HUMANITIES

OXFORD HUMS 8

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SECOND EDITION

VICTORIAN CURRICULUM

OXFORD
UNIVERSITY PRESS
AUSTRALIA & NEW ZEALAND

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CONTENTS

Contents by skill ix

Introducing Oxford Humanities 7–10 xii

PART 1
Geography

Concepts and skills

Chapter 1
The geography toolkit 4

1A What are the geographical concepts?

1.1 Geographical concepts 6

1B What are the geographical skills?

1.2 Geographical skills 12

1.3 Asking questions and conducting research 13

1.4 Conducting fieldwork 14

1.5 Interpreting geographical images 15

1.6 Analysing maps 16

1.7 Identifying patterns and relationships 26

1.8 Collecting and representing data 28

1.9 Communicating and reflecting 33

Landscapes and landforms

Chapter 2
Introduction to landscapes and landforms 38

2A What are landscapes and landforms?

2.1 The Earth's landscapes 40

2.2 The Earth's landforms 42

2.3 How we value landscapes and landforms 44

2.4 Spiritual value in Australia 46

2.5 Human impacts on landscapes 48

2A Rich task: Tourism in Australia 50

Chapter review 52

Chapter 3
Mountain landscapes 54

3A How are mountain landscapes formed?

3.1 Tectonic plates 56
3.2 How mountains are formed 58
3.3 Mountains of the world 62
3A Rich task: The mountains of the Kokoda Track 64

3B How are mountain landscapes used and managed?

3.4 Mountain resources 66
3.5 The impacts of farming on mountains 68
3.6 The impacts of climate change on mountains 71
3.7 Protecting the mountains 74
3B Rich task: Wolong National Nature Reserve, China 76

3C Are mountain landscapes hazardous places?

3.8 Volcanoes 78
3.9 Indonesia: Home of the volcano 80
3.10 Landslides 84
3.11 Landslides in Myanmar's jade mines 86
3C Rich task: Avalanches 88
Chapter review 90

Chapter 4
Coastal landscapes 92

4A How are coastal landscapes formed?

4.1 How coastal landscapes are formed 94
4.2 Erosional landforms 98
4.3 Depositional landforms 100
4.4 Coastal landforms of the world 102
4A Rich task: Hampton Beach 104

4B How are coastal landscapes used and managed?

4.5 The many uses of coastal landscapes 106
4.6 Gas exports 108
4.7 Pollution 110
4.8 Managing coastal landscapes 112
4B Rich task: Tweed Heads and bypassing 114

4C Are coastal landscapes hazardous places?

4.9 Coastal erosion 116
4.10 Tsunamis 118
4.11 Indian Ocean earthquake and tsunami (2004) 121
4C Rich task: The Twelve Apostles 124
Chapter review 126

Changing nations

Chapter 5
Urban life 128

5A Why do people live in cities?

5.1 The urban explosion 130
5.2 The rise of the megacity 132
5.3 Jakarta: Our closest megacity 134
5.4 Urbanisation in Indonesia 136
5.5 The advantages of living in cities 138
5.6 The disadvantages of living in cities 140
5A Rich task: Patterns of urbanisation 142

5B Where do people in different countries live?

5.7 Australia's cities 144
5.8 Why Australians live in cities 146
5.9 America's cities 149
5.10 Why Americans live in cities 152
5.11 New York: America's megacity 155
5B Rich task: The growth of Washington DC 158

5C How can we plan for and manage Australia's future?

5.12 Forecasting urban growth in Australia 160
5.13 Managing urban growth in Australia 162
5.14 Arguments for and against decentralisation 164
5C Rich task: Canberra – a decentralised city 166
Chapter review 168

Chapter 6
Migration 170

6A Why do people move?

6.1 Explaining population movements 172
6.2 Population movements in Australia 174
6.3 Australian mining towns 176
6.4 Population movement in China 178
6.5 Case study: Growth in Shenzhen 180
6A Rich task: Wealth and migration 182

6B How has international migration changed Australia?

6.6 International migration to Australia 184
6.7 The changing face of Australia 186
6.8 Migrant communities in Australian cities 190
6B Rich task: International migration and Aboriginal and Torres Strait islander peoples 192
Chapter review 194

PART 2
History

Concepts and skills

Chapter 7
The history toolkit.............................. 198

7A What are the historical concepts?

7.1 Historical concepts 200

7B What are the historical skills?

7.2 Historical skills 202
7.3 Asking questions and conducting research 203
7.4 Sequencing events 206
7.5 Analysing cause and effect 208
7.6 Identifying continuity and change 210
7.7 Determining historical significance 212
7.8 Analysing sources 213
7.9 Communicating and reflecting 218

The European and Mediterranean world

Chapter 8 Available on obook pro
Introduction to the European and Mediterranean world 220

8A Where and when did civilisations in the European and Mediterranean world develop?

8.1 The where and when of the European and Mediterranean world
8.2 The birth of the modern world in Europe

8B What were the key features of societies in the European and Mediterranean world?

8.3 Key features of societies across the European and Mediterranean world

Chapter 9
The Vikings.. 222

9A How was Viking society organised?

9.1 The Vikings: A timeline 224
9.2 Social classes and roles in Viking society 226
9.3 Viking home life and work 230
9.4 Viking laws and economy 233
9.5 Viking beliefs and mythology 235
9A Rich task: Brutal barbarians … or not? 238

9B What developments led to Viking expansion?

9.6 Viking raids 240
9.7 Viking skills and achievements 242
9B Rich task: Viking *berserkers* 246

9C How did Viking conquests change societies?

9.8 Changes within the Viking homeland 248
9.9 Changes in other societies 251
9.10 Significant individual: Leif Ericson 254
9C Rich task: The Viking legacy 256
Chapter review 258

Chapter 10
Medieval Europe 260

10A How were societies in medieval Europe organised?

10.1 Medieval Europe: A timeline 262
10.2 Feudalism in medieval Europe 264
10.3 Key social groups in medieval society 266
10.4 The feudal manor 268
10.5 Daily life in medieval Europe 270
10.6 Housing for the rich and poor 273
10.7 The medieval castle 276
10A Rich task: The achievements of medieval women 278

10B Why did societies in medieval Europe change?

10.8 A period of great change 280
10.9 Significant individual: Charlemagne 282
10.10 The spread of Christianity 284
10B Rich task: King Richard III 288

10C What developments influenced life in medieval Europe?

10.11 Cultural developments in medieval Europe 290
10.12 Developments in crime and punishment 292
10.13 Developments in military and defence systems 296
10.14 Developments in towns, cities and commerce 302
10C Rich task: Stained glass windows 304

10D How did the Black Death affect medieval Europe?

10.15 The Black Death 306
10.16 The spread of the Black Death 308
10.17 Medicine at the time of the Black Death 310
10.18 Religion at the time of the Black Death 312
10.19 The end of the world 314
10.20 The short-term effects of the Black Death 316
10.21 The long-term effects of the Black Death 319
10D Rich task: Morals, ethics and the spread of disease 322
Chapter review 324

Chapter 11 Available on obook pro
The Ottoman Empire 326

11A How was society organised during the Ottoman Empire?

11.1 The Ottoman Empire: A timeline
11.2 The origins of the Ottoman Empire
11.3 The rule of the sultan
11.4 Roles in Ottoman society

11.5 Daily life in the Ottoman Empire
11A Rich task: A day at the Topkapi Palace

11B What were the most significant achievements of the Ottoman Empire?

11.6 Expansion of the Ottoman Empire
11.7 The Ottomans and the people they conquered
11.8 Ottoman architecture, literature and art
11B Rich task: Ottoman power on land and sea

11C What challenges and developments influenced the Ottoman Empire?

11.9 The Black Death
11C The consequences of population loss
Chapter review

The Asia–Pacific world

Chapter 12 Introduction to the Asia–Pacific world .... 328 Available on obook pro

12A Where and when did civilisations in the Asia–Pacific world develop?

12.1 The where and when of the Asia–Pacific world

12B What were the key features of societies in the Asia–Pacific world?

12.2 Key features of societies in the Asia–Pacific world

Chapter 13 The Khmer Empire .... 330 Available on obook pro

13A How did the Khmer Empire rise to power?

13.1 The Khmer Empire: A timeline
13.2 The importance of geography for the Khmer Empire
13.3 Origins of the Khmer Empire
13.4 Significant individual: Jayavarman II
13.5 Expansion of the empire
13.6 Achievements in temple building
13.7 Angkor Wat
13A Rich task: The Khmer Empire's physical features

13B How was society organised during the Khmer Empire?

13.8 Village life in the Khmer Empire
13.9 The structure of Khmer society
13.10 Daily life for the rich and poor
13.11 Religion in the Khmer Empire
13B Rich task: Understanding daily life in the Khmer Empire

13C Why did the Khmer Empire come to an end?

13.12 Internal challenges for the Khmer Empire
13.13 External challenges for the Khmer Empire
13C Rich task: Conserving Khmer sites
Chapter review

Chapter 14 Mongol expansion .... 332 Available on obook pro

14A How was Mongol society organised?

14.1 Mongol expansion: A timeline
14.2 Traditional Mongol culture and society
14.3 Social roles in Mongol society
14.4 Significant individuals: Temujin (Genghis Khan)
14.5 The Mongol army
14A Rich task: Oaths, loyalty and rivalry

14B Why did Mongols expand their territory?

14.6 Expansion of the Mongol Empire under Genghis Khan
14.7 Expansion under Ogodei and his heirs
14.8 Kublai Khan and conquests in Asia
14.9 End of Mongol rule in Asia
14B Rich task: Mongol warfare

14C What were the consequences of Mongol expansion?

14.10 The impact of expansion on traditional Mongol life
14.11 The impact of Mongol expansion
14C Life in China under Mongol rule
Chapter review

Chapter 15 Japan under the shoguns 334

15A What led to the rise of the shoguns?

15.1 Japan under the shoguns: A timeline 336
15.2 Life before the shoguns 338
15.3 The rise of the emperor 340
15A Rich task: Religious beliefs 344

15B How was Japanese society organised during the rule of the shoguns?

15.4 The shogunates 346
15.5 Significant individual: Tokugawa Ieyasu 349
15.6 Social groups in Shogunate Japan 352
15.7 Women in Shogunate Japan 354
15.8 The life of a samurai 356
15.9 Towns and castles 358
15B Rich task: *The Pillow Book* 360

15C How did Japan change during the rule of the shoguns?

15.10 Changes to foreign policy 362
15.11 Changes to cities and the environment 364
15.12 Changes in culture and the arts 366
15.13 The end of the shogunate 369
15C The rise and fall of the shoguns 372
Chapter review 374

Chapter 16 The Polynesian expansion across the Pacific 376

Available on obook pro

16A How did Polynesians spread across the Pacific and where did they settle?

16.1 The Polynesian expansion across the Pacific: A timeline
16.2 The geography of Polynesia
16.3 Theories about Polynesian expansion
16.4 Polynesian journeys across the Pacific
16A Rich task: Origin myths of the Māori

16B How was society organised in Polynesian villages?

16.5 Polynesian societies
16.6 Māori society
16.7 Daily life in a Māori village
16B Rich task: Māori warrior culture

16C What developments influenced life in Polynesia?

16.8 Managing the environment
16.9 Polynesian arts
16C Rich task: Canoe building
Chapter review

Expanding contacts: Discovery, and exploration

Chapter 17 Introduction to expanding contacts: Discovery and exploration 378

Available on obook pro

17A What caused societies in Europe to begin a period of discovery and exploration?

17.1 The where and when of expanding contacts: Discovery and exploration

17B What were the key factors leading to discovery and exploration?

17.2 Key factors leading to the age of discovery and exploration

Chapter 18 Renaissance Italy 380

18A Why did the Renaissance develop?

18.1 Renaissance Italy: A timeline 382
18.2 Causes of the Renaissance 384
18.3 City-states of Renaissance Italy 386
18A Rich task: The Italian League 388

18B How was society organised during the Renaissance in Italy?

18.4 The social structure of Renaissance Italy 390
18.5 Women and children in Renaissance Italy 392
18.6 Society in Renaissance Florence 394
18B Rich task: Renaissance society 398

18C What were the greatest achievements of the Renaissance and how did they influence the rest of Europe?

18.7 Humanism 400
18.8 Renaissance art 402
18.9 Renaissance science and technology 406
18.10 The Northern Renaissance and the Reformation 408
18.11 The culture of the Northern Renaissance 410
18C Rich task: The evolving Renaissance 412
Chapter review 414

Chapter 19 The Spanish conquest of the Americas 416

Available on obook pro

19A How were societies organised in the Americas before the arrival of the Spanish?

19.1 The Spanish conquest of the Americas: A timeline
19.2 The major civilisations of the Maya, Inca and Aztec
19.3 Key groups in Aztec society
19.4 Religious beliefs in Aztec society
19.5 Life in Tenochtitlan
19A Rich task: Life in the Aztec Empire

19B Why did the Spanish colonise the Americas? How were they able to do so?

19.6 The Age of Exploration begins
19.7 The Spanish conquest of the Aztecs
19B Rich task: Why the Spanish won

19C What were the effects of Spanish conquest in the Americas and around the world?

19.8 The Spanish colonisation of Mexico
19C Rich task: Impact of the Spanish conquest of the Americas
Chapter review

PART 3 Economics and business

Skills

Chapter 20 The economics and business toolkit...420

20A What are the economics and business skills?

20.1 Economics and business skills 422
20.2 Asking questions and conducting research 423
20.3 Analysing sources 424
20.4 Reasoning and decision making 425
20.5 Communicating and reflecting 427

Economics and business

Chapter 21
The world of business 428

21A How do innovation and entrepreneurship help a business reach its goals?

21.1 Goals of a business 430
21.2 Entrepreneurship and innovation 432
21A Rich task: Social entrepreneurs: Thankyou 434

21B What does it mean to be a responsible business?

21.3 Responsible businesses 436
21B Rich task: Socially responsible business: The Body Shop .. 438
Chapter review 440

Chapter 22
The world of work 442

22A How will the way we work affect our lives in the future?

22.1 Why we work 444
22.2 The changing work environment 446
22A Rich task: Career goals 448

22B How and why are workplaces different around the world?

22.3 Workers of the world 450
22.4 Workers in Australia 452
22B Rich task: Minimum wages 454
Chapter review 456

PART 4
Civics and citizenship

Skills

Chapter 23
The civics and citizenship toolkit 460

23A What are the civics and citizenship skills?

23.1 Civics and citizenship skills 462
23.2 Asking questions and conducting research 463
23.3 Analysing sources 465
23.4 Evaluating and decision making 466
23.5 Communicating and reflecting 467

Government and democracy

Chapter 24
Democracy in Australia 468

24A How is Australia's system of democratic government shaped by the Constitution?

24.1 The Australian Constitution 470
24.2 Changing the Constitution 472
24A Rich task: Reforming the Constitution 474

24B What are the freedoms and responsibilities of citizens in Australia's democracy?

24.3 The freedoms of Australian citizens 476
24.4 Active participation 478
24B Rich task: Petitions 480
Chapter review 482

Laws and citizens

Chapter 25
Justice and the law 484

25A How does Australia's legal system protect the individual's right to justice?

25.1 Principles of Australia's legal system 486
25A Why is the Magna Carta important to Australia? 488

25B How are laws made and applied in Australia?

25.2 Common law 490
25.3 Statute law 492
25.4 Different types of law 495
25B Rich task: Bullying 498
Chapter review 500

STEAM project 1 502
STEAM project 2 506
Glossary 510
Index 523
Acknowledgements 528

CONTENTS BY SKILL

Throughout Humanities, you will study four distinct subjects: Geography, History, Economics & Business and Civics & Citizenship. Each of these subjects has its own set of key skill areas that you will learn about and develop through the course of your study. This table of contents shows where you can find the opportunities to practise these skills, both in the book and on obook pro. For more information on the key skill areas listed, visit the Toolkit for each subject.

Geography skills

	Key skill	Practise the skill	Chapter	Page number
Curriculum strand: Place, space & interconnection	ASKING QUESTIONS & CONDUCTING RESEARCH	Planning a geographical inquiry	1	13
		Ethically researching Aboriginal and Torres Strait Islander geography	2	obook
		Developing geographical inquiry questions about the coast	4	obook
	CONDUCTING FIELDWORK	Writing a basic fieldwork report	1	obook
		Measuring longshore drift	4	104
		Drawing sketch maps	4	114
		Creating a field sketch	4	124
	INTERPRETING GEOGRAPHICAL IMAGES	Comparing different types of geographical images	3	obook
		Using historical imagery	3	71
		Analysing change using satellite images	4	122
		Comparing vertical aerial images	5	166
	ANALYSING MAPS	Understanding BOLTSS features	1	obook
		Understanding direction	1	obook
		Understanding six-figure grid referencing and topographic maps	1	obook
		Reading map scales	3	obook
		Using a map legend	3	obook
		Reading dot distribution maps	5	obook
		Drawing conclusions from maps	6	182
		Reading a complex map	6	192
Curriculum strand: Data & information	IDENTIFYING PATTERNS & RELATIONSHIPS	Interpreting a cross section	3	64
		Interpreting contour lines	3	76
		Using maps to describe change	5	obook
		Interpreting choropleth maps	5	143
	COLLECTING & REPRESENTING DATA	Distinguishing between quantitative and qualitative data	1	obook
		Reading multiple-line graphs	2	50
		Constructing a cross-section	3	89
		Reading a scatterplot	5	138
		Creating column and line graphs	5	159
		Reading population pyramids	6	177
		Creating an infographic	6	obook
	COMMUNICATING & REFLECTING	Creating an annotated visual display (AVD)	1	34
		Answering ‘to what extent’ questions	5	obook

History skills

	Key skill	Practise the skill	Chapter	Page number
Curriculum strand: Chronology	SEQUENCING EVENTS	Creating a timeline	7	207
		Viking raids	9	obook
		The Crusades	10	obook
		The Black Death	10	obook
		The rulers of Japan during the Shogunate era	15	obook
		Plotting events on a timeline	18	413

continued

	Key skill	Practise the skill	Chapter	Page number
Curriculum strand: Cause and effect	ANALYSING CAUSE & EFFECT	Analysing the cause and effect of the Black Death	7	209
		Viking raids	9	obook
		The Viking Raids	9	obook
		The Crusades	10	obook
		The Shambles	10	obook
		Creating a concept map	11	11.34 (obook)
		Analysing a map	13	13.25 (obook)
		Population and resources	15	obook
		The Renaissance period	18	obook
		The Reformation	18	obook
Curriculum strand: Continuity and change	IDENTIFYING CONTINUITY & CHANGE	Identifying continuity and change in fighting pandemics	7	210
		Change in medieval Europe	10	obook
		Crime and punishment	10	obook
		Guilds	10	obook
		Japan's policies	15	obook
		Sumo wrestling	15	obook
Curriculum strand: Historical significance	DETERMINING HISTORICAL SIGNIFICANCE	Leif Ericson	9	obook
		The Magna Carta	10	obook
		The Yamato clan	15	obook
		Tokugawa Ieyasu	15	obook
		Commodore Matthew Perry	15	obook
		The Medici Family	18	obook
		The 5Rs of historical significance	19	19.15 (obook)
Curriculum strand: Historical sources as evidence	ASKING QUESTIONS & CONDUCTING RESEARCH	Generating questions	7	203
		Extracting information to answer research questions	9	257
		Using the internet to find relevant, credible and reliable sources	14	14.45 (obook)
		Earliest settlers in Japan	15	obook
		Summarising your research	15	344
		Identifying and locating relevant sources	16	16.15 (obook)
		The English Renaissance	18	obook
		Generating historical inquiry questions	19	19.31 (obook)
	ANALYSING SOURCES	Analysing primary sources	9	239
		Using Venn diagrams to compare information from a range of sources	10	279
		Analysing perspectives on Charlemagne	10	283
		Drawing conclusions about the usefulness of sources	10	289
		Identifying the origin and purpose of primary sources	10	305
		Health in the Khmer Empire	13	13.35 (obook)
		Analysing historical representations	13	13.40 (obook)
		Interpreting sources	14	14.16 (obook)
		Analysing a source using DAMMIT U	14	14.35 (obook)
		Shoguns on social order	15	obook
		Writing a source analysis	15	360
		Analysing perspectives	15	371
		Analysing primary sources	16	16.25 (obook)
		Locating, comparing, selecting and using information from a range of sources as evidence	16	16.33 (obook)
		Analysing primary sources	18	399
		Determining the usefulness and reliability of sources	19	19.21 (obook)
	COMMUNICATING & REFLECTING	Integrating evidence into your explanations	9	247
		The Medieval period	10	obook
		Preparing a speech	10	323
		Writing descriptions	11	11.17 (obook)
		Creating and presenting an audiovisual presentation	11	11.29 (obook)
		Developing a written historical argument	13	13.49 (obook)
		Writing an extended response	14	14.19 (obook)
		Writing a historical description	15	357
		Writing an evaluative essay	15	373
		Creating and delivering an audiovisual presentation	18	389
		Writing a historical discussion	19	19.37 (obook)

Economics & business skills

	Key skill	Practise the skill	Chapter	Page number
Curriculum strand: Reasoning & Interpretation	ASKING QUESTIONS & CONDUCTING RESEARCH	Interviewing an entrepreneur Setting SMART career goals Developing questions and researching	21 22 22	435 448 451
	REASONING & DECISION MAKING	Evaluating options Pros and cons of working from home	20 22	425 obook
	ANALYSING SOURCES	Product safety Analysing economic data from a bar graph	21 22	obook 455
	COMMUNICATING & REFLECTING	Presenting research Creating a concept map	21 21	obook 439

Civics & citizenship skills

	Key skill	Practise the skill	Chapter	Page number
Curriculum strand: Reasoning & Interpretation	ASKING QUESTIONS & CONDUCTING RESEARCH	Freedom of movement in a pandemic Collecting information	24 25	obook 489
	EVALUATING & DECISION MAKING	Evaluating Australia's Constitution Creating a classroom constitution Drafting a bill	24 24 25	474 obook 499
	ANALYSING SOURCES	Reaching an informed opinion Weighing up the evidence	24 25	obook obook
	COMMUNICATING & REFLECTING	Creating a petition Using direct action	24 24	481 obook

INTRODUCING OXFORD HUMANITIES 7–10

Oxford Humanities Victorian Curriculum has been developed to meet the requirements of the *Victorian Curriculum: Humanities* across Years 7–10. As well as offering complete coverage of *Geography, History, Economics and Business,* and *Civics and Citizenship*, this new edition ensures that students build their Humanities skills across all four subjects, preparing them for success in Humanities in VCE.

The series offers a completely integrated suite of print and digital resources to meet your needs, including:

- Student Book
- Student obook pro
- Teacher obook pro.

Key features of Student Books

- The Student Books combine complete curriculum coverage with clear and engaging design.
- Each print Student Book comes with complete access to all of the digital resources available on Student obook pro.

Focus on skill development

Key skills

- Key skill activities enable students to practise and master skills in each subject. More key skill activities are available via Student obook pro to provide comprehensive coverage of Humanities skills.

Visible thinking prompts

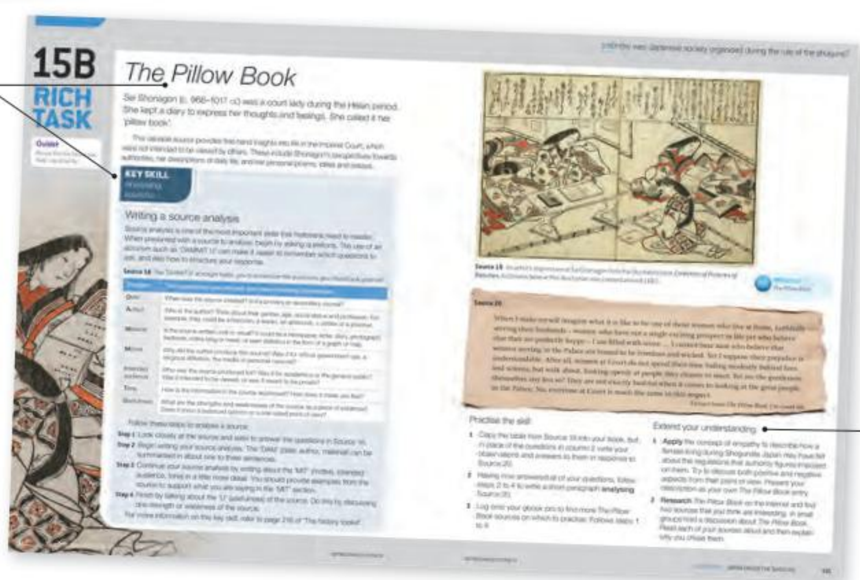
- Visible thinking prompts encourage students to develop their critical thinking and analysis skills.

Check your learning

- Each topic finishes with a set of questions that enables students to consolidate their learning.

Task words

- Questions are generally phrased using bolded task words, which state what is expected of a student and help develop their understanding of questions beyond 'who, what, when, where and why'.



Rich tasks

- Rich tasks provide in-depth skills practice, encouraging students to apply the knowledge and skills they have learned to a new case study, event or issue.

Extend your understanding

- These activities challenge students to conduct further research or complete group work to deepen their understanding of an issue or skill.

Focus on engagement

Topic-based approach
- Chapter content is sequenced in numbered topics to support teaching and learning.

Learning outcomes
- Each topic begins with a statement of the learning outcomes, which link the content to the curriculum.

Integrated digital resources
- Digital icons signpost a range of engaging resources that can be accessed via Student obook pro, including drag-and-drop activities, video quizzes, virtual field trips and quick quizzes. These resources are directly integrated with the topic being covered.

Source materials
- A variety of source materials such as photographs, maps, illustrations, text extracts and graphs will spark students' curiosity and provide rich learning opportunities.

Focus on support for mixed-ability classrooms

Margin glossary terms
- On-page glossary definitions are provided for key terms, supporting students at their point of learning. Key terms also appear in a glossary at the end of the book, and can be revised in a fun Quizlet game via Student obook pro.

Easy-to-access text and design
- The text is written in clear and concise language and the text design is engaging and easy to navigate.

Structured questions
- Questions for each topic are graded according to Bloom's taxonomy, catering for a range of abilities.

Customisable chapter review section
- Each chapter ends with a chapter review that gives students the chance to consolidate their knowledge and apply the skills they have learnt throughout. A marking rubric and customisable version of the Chapter review is available via Teacher obook pro to support differentiation.

Focus on STEAM

Integrated STEAM projects
- Take the hard work out of cross-curricular learning with engaging STEAM projects. Two fully integrated projects are included at the end of each book in the series, and are scaffolded and mapped to the Humanities, Science and Maths curricula. The same projects also feature in the corresponding Oxford Science and Oxford Maths series to assist cross-curricular learning.

Problem solving through design thinking
- Each STEAM project investigates a real-world problem that students are encouraged to problem solve using design thinking.

Full digital support
- Each STEAM project is supported by a wealth of digital resources, including student booklets (to scaffold students through the design thinking process of each project), videos to support key concepts and skills, and implementation and assessment advice for teachers.

Key features of Student obook pro

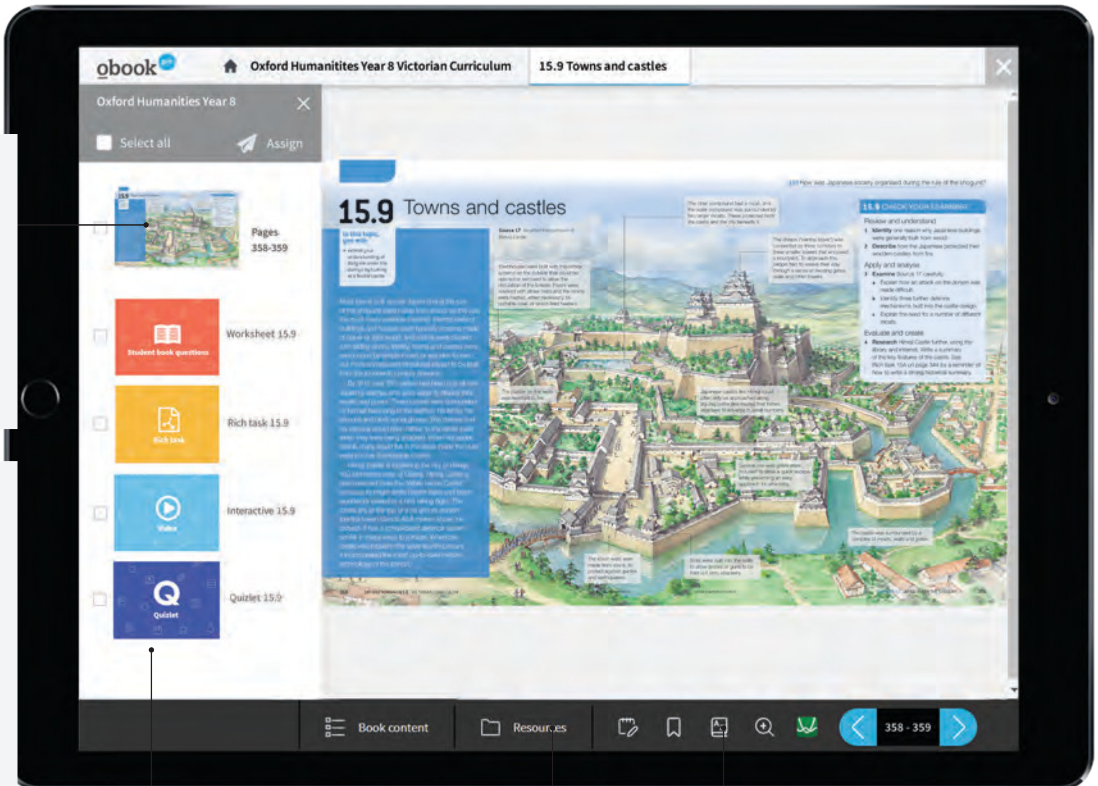
obook pro

> Student obook pro is a completely digital product delivered via Oxford's online learning platform, **Oxford Digital**.

> It offers a complete digital version of the Student Book with interactive note-taking, highlighting and bookmarking functionality, allowing students to revisit points of learning.

> A complete ePDF of the Student Book is also available for download for offline use and read-aloud functionality.

Focus on eLearning



Complete digital version of the Student Book

- This digital version of the Student Book is true to the print version, making it easy to navigate and transition between print and digital.

Interactive assessments

- Each topic in the Student Book is accompanied by an interactive assessment that can be used to consolidate concepts and skills and for formative assessment.
- These interactive assessments are autocorrecting, with students receiving instant feedback on achievement and progress. Students can also access all their online assessment results to track their own progress and reflect on their learning.

Quizlet

- Integrated Quizlet sets, including real-time online quizzes with live leaderboards, motivate students by providing interactive games that can be played solo or as a class. Quizlet can be used for revision or as a warm-up activity when a chapter is introduced.

Additional resources

- A rich variety of additional resources such as interactive layered maps, videos, worksheets, quizzes and weblinks are linked to individual topics in the book so they can be accessed at the point of learning.

Integrated dictionary

- Each digital Student Book provides an integrated Australian Concise Oxford Dictionary look-up feature, so students can quickly access any terminology they aren't sure of and continue their learning.

Benefits for students

> integrated Australian Concise Oxford Dictionary look-up feature
> interactive assessments to consolidate understanding
> integrated Quizlet sets including real-time online quizzes with live leaderboards
> additional resources available at the point of learning
> access to their online assessment results to track their own progress

Key features of Teacher obook pro

obook pro

> Teacher obook pro is a completely digital product delivered via **Oxford Digital**.
> Each chapter and topic of the Student Book is accompanied by full teaching support. Teaching programs clearly direct learning pathways throughout each chapter and provide ideas for differentiation.
> Teachers can use their Teacher obook pro to share notes and easily assign resources or assessments to students, including due dates and email notifications.

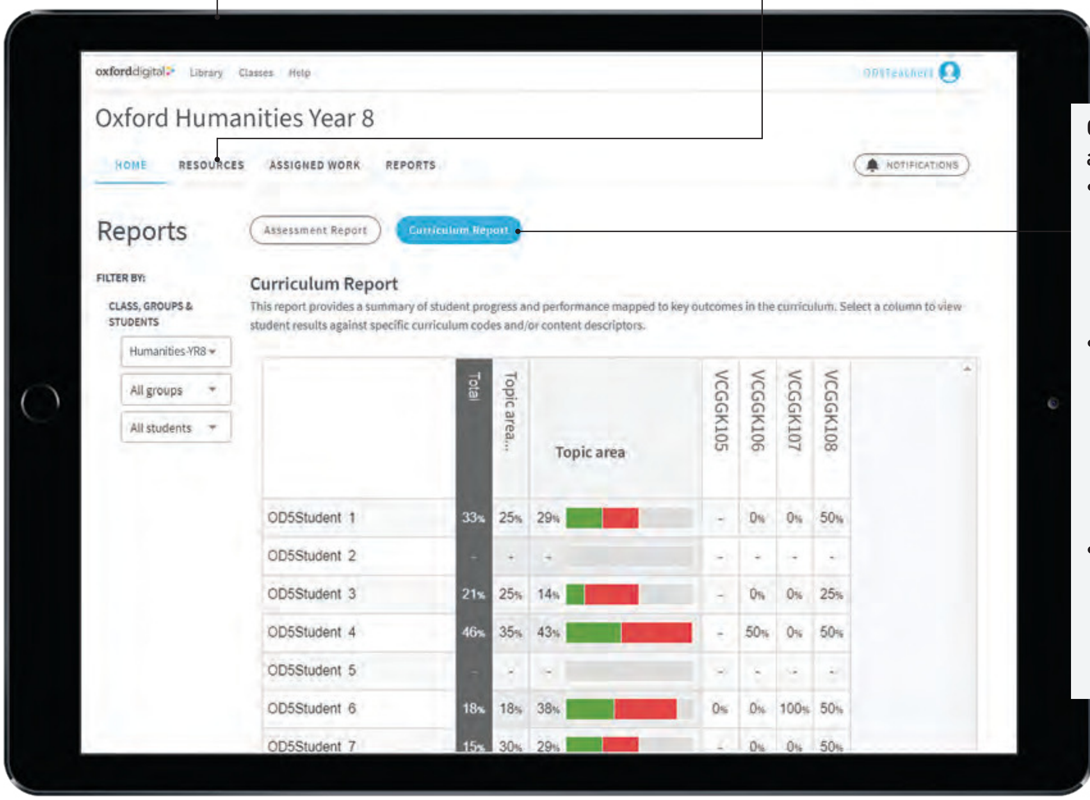
Focus on assessment and reporting

Complete teaching support

- Teaching support provides full lesson and assessment planning, ensuring there is more time to focus on students.

Additional resources

- Each chapter of the Student Book is accompanied by additional resources, including answers to every Student Book question, differentiated worksheets and class tests to monitor student progress.



Curriculum and assessment reports

- Teachers are provided with clear and tangible evidence of student learning progress through curriculum and assessment reports.
- Assessment reports directly show how students are performing in each online interactive assessment, providing instant feedback for teachers about areas of understanding.
- Curriculum reports summarise student performance against specific curriculum content descriptors and curriculum codes.

Benefits for teachers

> Teachers have access to all student resources.
> As well as online assessment, teachers have access to editable class tests that are provided at the end of each chapter. These tests can be used as formative or summative assessment and can be edited to suit the class's learning outcomes.
> As students complete online assessments, their results are measured against curriculum outcomes through the curriculum report. This allows easy understanding of how students are progressing, and where they may need support.

PART 1

Geography

Concepts and skills

Chapter 1 The geography toolkit 4

Landscapes and landforms

Chapter 2 Introduction to landscapes and landforms 38
Chapter 3 Mountain landscapes 54
Chapter 4 Coastal landscapes 92

Changing nations

Chapter 5 Urban life 128
Chapter 6 Migration 170

CHAPTER 1

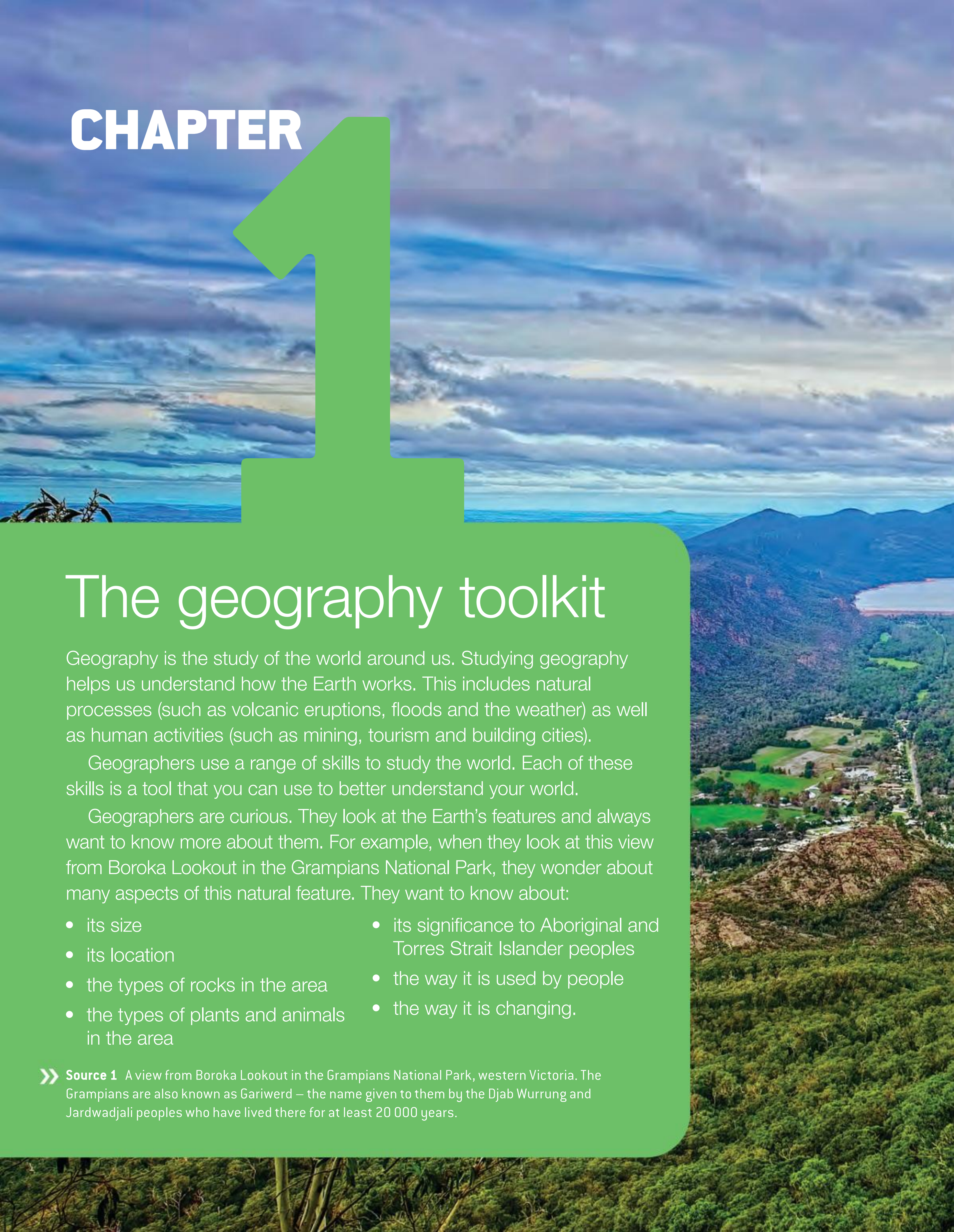
The geography toolkit

Geography is the study of the world around us. Studying geography helps us understand how the Earth works. This includes natural processes (such as volcanic eruptions, floods and the weather) as well as human activities (such as mining, tourism and building cities).

Geographers use a range of skills to study the world. Each of these skills is a tool that you can use to better understand your world.

Geographers are curious. They look at the Earth's features and always want to know more about them. For example, when they look at this view from Boroka Lookout in the Grampians National Park, they wonder about many aspects of this natural feature. They want to know about:

- its size
- its location
- the types of rocks in the area
- the types of plants and animals in the area
- its significance to Aboriginal and Torres Strait Islander peoples
- the way it is used by people
- the way it is changing.



Source 1 A view from Boroka Lookout in the Grampians National Park, western Victoria. The Grampians are also known as Gariwerd – the name given to them by the Djab Wurrung and Jardwadjali peoples who have lived there for at least 20 000 years.

1A
What are the geographical concepts?

1B
What are the geographical skills?

1.1 Geographical concepts

Geographers use seven key concepts to help them investigate and understand the world. As you learn to use each of the concepts, you will begin to think like a geographer. At times you will use several of these at once, while at other times you may focus on just one.

The seven key concepts in geography are:

- place
- space
- environment
- interconnection
- sustainability
- scale
- change.

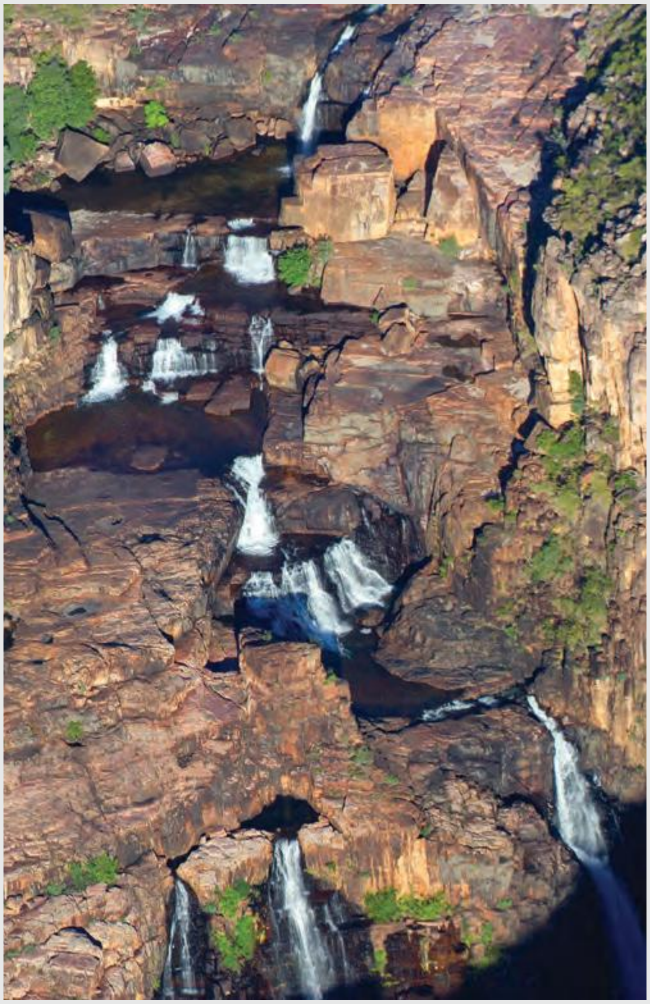
Place

Places are parts of the Earth's surface that are identified and given meaning by people. A place can be as small as your bedroom or as large as the entire planet! The life of every person and animal on the Earth is influenced by place. Places can be natural (shaped by the environment and largely unchanged by humans) or built (constructed by humans). Places determine our relationships with one another (for example, our closest relationships are likely to be with people in the same place). The environmental and social qualities of a place also influence the way we live. Climate, landscapes, types of plants and resources, transport networks, entertainment venues and workplaces all have a major impact on the way we live.

For Aboriginal and Torres Strait Islander peoples, place also has a deeper spiritual meaning and can provide a sense of identity. Aboriginal and Torres Strait Islander peoples see themselves as custodians of the land and believe that they have a responsibility to look after it.

Geographers use the concept of place when conducting any geographical inquiry. Just as place influences people, people also influence place. The ways in which we live, and the actions we take, change the places in which we live. Geographers investigate the outcomes of these changes.

For more information on place, read the key concept box 'Place' in topic 2.4 on page 47.



Source 1 An aerial view of Twin Falls, Kakadu National Park, Northern Territory; Aboriginal people have lived in the Kakadu region of the Northern Territory for over 50 000 years, and Kakadu National Park is World Heritage listed due to its cultural significance.

Space

To a geographer, the concept of space is the way that things are arranged on the Earth's surface. Geographers investigate spaces, look for patterns and try to find an explanation. The concept of space helps them to do this. It has three main elements:

- *location* – where things are located on the Earth's surface
- *spatial distribution* – the shapes and patterns in which things are arranged on the Earth's surface
- *organisation* – how and why things are arranged and managed on the Earth's surface by people.

Geographers investigate the way that people use and change the space in which they live. They recognise that different groups of people use space in different ways and that this changes over time. Geographers also investigate the ways that improvements in transport and communication have made links between places quicker and easier, and the ways in which this is changing the world.

The concepts of place and space can be difficult to separate, but it will help if you remember that places can be divided into spaces. For example, a small place, such as your school, has different spaces. Each of these spaces has its own purpose. There are spaces for learning (such as classrooms and computer rooms), playing (such as playgrounds and play equipment), eating (such as the cafeteria or canteen) and running the school (such as staffrooms and administration buildings).

Source 2 A house is an example of a place with many different spaces. For example, the kitchen is a space for cooking, the bathroom is a space for washing and the bedroom is a space for resting.

Larger places (such as your suburb, town or city) are also organised into different spaces. There are spaces for housing (such as homes for families), businesses (such as shops and offices), industry (such as factories and warehouses), entertainment (such as concert halls and theatres), and sport and recreation (such as stadiums, parks and gardens).

For more information on space, read the key concept box 'Space' in topics 4.10 on page 119 and 5.9 on page 149.

Environment

Our world is made up of many different environments. Some environments are natural (or physical), such as deserts, grasslands, mountains, coral reefs, forests, oceans and ice caps (thick layers of ice that cover areas of land). In order for an environment to be considered natural, its soils, rocks, climate, plants and animals must remain largely untouched by humans. Today, there are very few truly natural environments left on the Earth.

Other environments have been so altered by humans that hardly any natural features remain. These environments are known as built (or human) environments and include large cities, towns, suburbs and vast areas of farmland. Human environments not only affect the natural features, they also affect the climate. For example, a large city will often be a few degrees hotter than the surrounding areas because concrete in the buildings traps the sun's heat. Most environments on the Earth are now a combination of natural and human features.

Source 3 This glacial environment in Antarctica is an example of a natural environment, untouched by humans.

The study of different environments helps geographers to better understand and appreciate natural processes, such as how weather works, how mountains are formed, and how rainforests and coral reefs grow. The concept helps geographers to analyse the changes humans make to natural environments and better appreciate their impact, so that these environments can be managed more wisely.

Source 4 An aerial view of the Gold Coast strip in Queensland; this example of a built environment is contrasted against the natural environment of the ocean and beach.

Interconnection

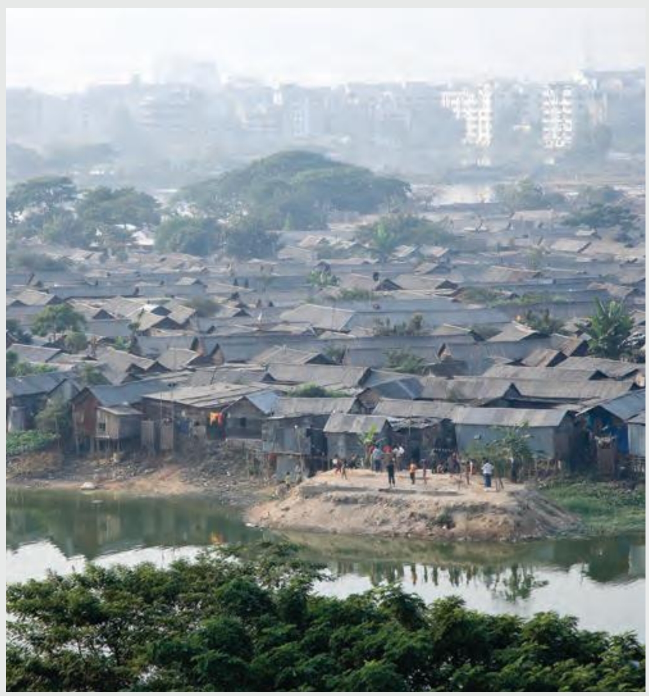
No place or thing on the Earth exists in isolation. All environments and every living and non-living thing found within them are connected. These connections can be on a local, national or global level.

Geographers use the concept of interconnection to better understand the complex links between natural and human processes that shape our Earth. Places and people can be linked in many different ways. These can be categorised as:

- *natural processes* – such as the water cycle and food chain
- *human activities* – such as the movement of people, the production and trade of goods, and the flow of investment and money linked within and between different countries.

Think of the Earth as a single living organism, much like the human body. Your brain, heart, lungs, stomach, arms and legs all work together as a single system to keep you alive and healthy. In much the same way, the Earth's living systems (such as climate, plants, animals, oceans, soils, atmosphere and energy) all function together and are interconnected. Even a slight rise in the Earth's temperature, for example, will have an effect on the oceans (such as damaging coral reefs and affecting the populations of fish and other sea creatures), the land (such as failure of crops and drought) and the polar ice caps (such as increasing sea levels and forcing millions of people to relocate their homes).

For more information on interconnection, read the key concept box 'Interconnection' in topics 3.11 on page 87 and 4.6 on page 108.



Source 5 In Bangladesh, a number of interconnected processes are causing sea levels to rise. It is estimated that 15 million of the poorest people living in Bangladesh, like those living in this slum, will be affected by a 1-metre rise in sea levels.

Sustainability

The concept of sustainability relates to the ongoing capacity of the Earth to maintain all life. In order to live sustainably, we must manage the Earth's resources so that they can be used to meet our own needs without compromising these resources for future generations.

Sustainability is an important concept for geographers. They use it to investigate how natural and human systems work, and to understand how resources can be managed in such a way that means they will be sustained into the future.

Many of the world's resources (such as oil, coal and natural gas) are non-renewable. This means that if we continue to use them, they will one day run out. Other resources (such as wind, forests, solar and water) are renewable. This means that they replace themselves naturally, or can be replaced to meet the needs of society. Sustainability encourages us to think more closely about these different types of resources – the ways in which they are formed and the speed at which they are being used. It also encourages us to look more closely at renewable options and take greater care of the Earth. Actions to improve sustainability can operate at any scale: local, national, international or global.

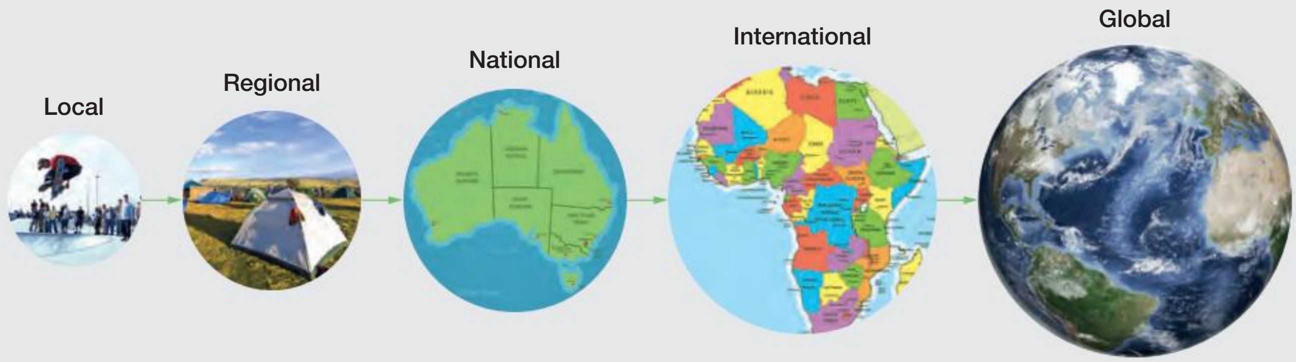
For more information on sustainability, read the key concept box 'Sustainability' in topic 3.5 on page 70.

Source 6 A wind farm – a source of renewable energy – near the town of Albany in Western Australia

Scale

The concept of scale is used to guide geographical inquiries. Geographers study things that take place on many different spatial levels – from small areas (such as a local park) to very large areas (such as the use of oil and coal all over the world). They use the concept of scale to look for explanations and outcomes at these different levels. A geographic inquiry of the ways in which people use parks, for example, may be carried out at a range of scales (from smallest to largest):

- *local* – such as an inquiry into the number of daily visitors to a neighbourhood skate park
- *regional* – such as an inquiry into the types of visitors staying at campsites in the Grampians/Gariwerd region of Victoria
- *national* – such as an inquiry into the numbers of tourists visiting national parks across Australia each year
- *international* – such as an inquiry into animal poaching in national parks and wild game reserves in different countries across Africa
- *global* – such as an inquiry into the use of all marine parks around the world and their effectiveness in protecting different species of marine animals.



Source 7 Geographical inquiries can be carried out on a number of different spatial levels: local, regional, national, international and global.

Change

Changes are constantly happening on the Earth. Some changes occur very rapidly and are obvious, while others take place over millions of years and are almost undetectable to us. The concept of change is important because it helps us to understand what is happening around us and how the Earth has been shaped and changed by natural forces, such as climate, earthquakes, volcanoes, running water and storms, to name just a few. In recent times, humans have shaped and changed the Earth to suit their own needs, but events such as volcanic eruptions and tsunamis are a reminder that powerful natural forces continue to alter the face of the Earth, regardless of what humans do.

Changes take place on many different levels, from personal and local right through to national and global. Small local changes that happen quickly, such as a tree falling over on your street, are often easy to observe and explain. Larger regional or national changes, such as an earthquake, can happen quickly, and their effects can be widespread and have devastating impacts on places and people. Changes that take place on a global scale can take much longer. Global warming, for example, is a long-term change that happens slowly. Its widespread effects are becoming clearer every year.

Observing and understanding natural and human-made changes is an important part of any geographical inquiry. Geographers need to look at different types of changes, why they have occurred, over what time period they have occurred and what further changes may take place as a result. Sometimes changes can be positive, such as the conservation of plants and animals in national parks, while other changes can have negative consequences, such as the deforestation of native rainforests. Geographers play an important role in ensuring that change is managed in a sustainable way.

For more information on change, read the key concept box 'Change' in topic 4.1 on page 95.

Source 8 Aerial images are a good tool for geographers to use to observe the impact of natural disasters, as well as the change over time. The changes that took place in Wallabi Point, New South Wales in December 2020, when a bushfire raged over much of the area, were devastating and rapid. The top image shows the area before the fire and the bottom image shows the same area after the fire.

Check your learning
Log onto your obook pro to complete the questions for topic 1.1.

1.2 Geographical skills

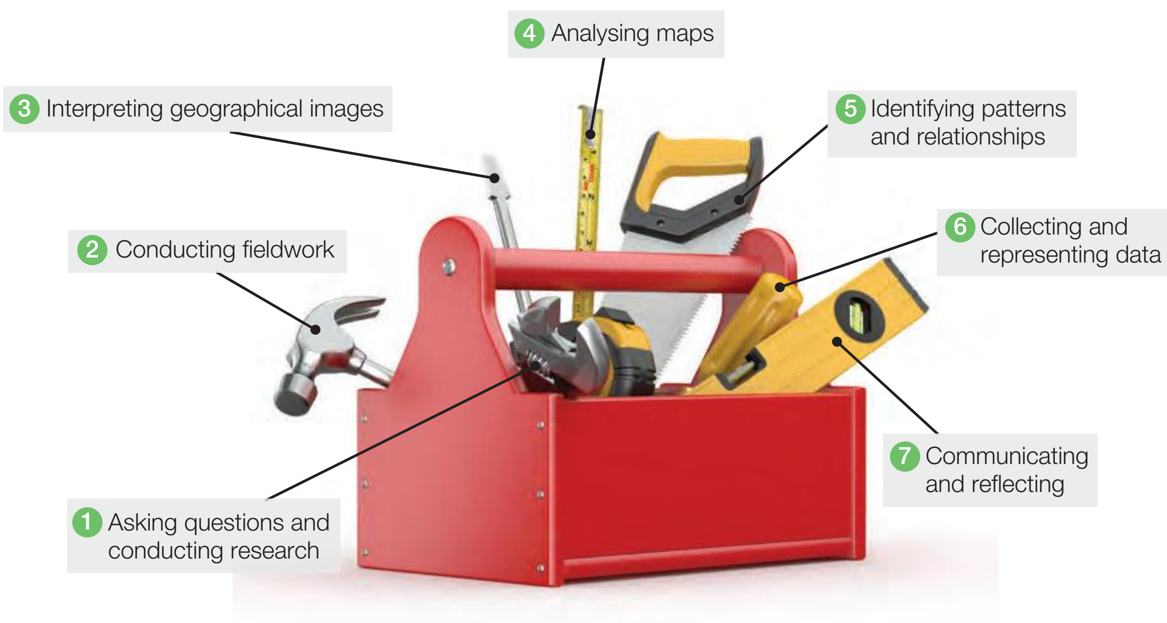
Geography has been described as the 'why of where'. Geographers examine the world and try to explain what they see. Like a detective at the scene of a crime, they follow a line of inquiry; and to do so, they need a range of skills.

As shown in Source 1, there are five stages in any geographical inquiry. Each stage has a number of specific skills that you will be learning. The stages are:

1. Asking questions and conducting research
2. Conducting fieldwork
3. Interpreting geographical images
4. Analysing maps
5. Identifying patterns and relationships
6. Collecting and representing data
7. Communicating and reflecting.

Each of the skills you will learn over the course of this year is explained in this chapter, and by studying geography you will gradually master each one. You will learn some of them quickly; others may take a little longer. As you develop each new skill, you will have gained another important tool for explaining the natural processes and human activities that shape our amazing planet.

It might help you to think of each of these skills as individual tools in your toolkit. For some geographical inquiries, you may only need to use one tool; for others, you may need to use many.



Source 1 There are five stages in any geographical inquiry. At each stage, geographers use different skills. Each of these skills is like a tool in a toolkit.

1.3 Asking questions and conducting research

geographical inquiry the process that geographers use to guide their investigations of people, places and things

If you look out the window of your classroom, you could ask some simple questions to form the basis of a geographical investigation, also known as a **geographical inquiry**. If the sun is shining, you could begin an inquiry into the hours of sunlight and the pattern of temperatures in your area. If you can see lots of trees or buildings, you could begin an inquiry into what type of environment you are in and the different forces that have shaped it.

Once you have observed what is around you, the next stage is to develop some geographical questions to focus your inquiry. Geographical questions can be as simple as 'What is it?' and 'Where is it?'; or more complex, such as 'What is the connection between these two things?' and 'How and why have things changed over time?'

KEY SKILL Asking questions & conducting research

Planning a geographical inquiry

Look at the image of Uluru in Source 3. As a geographer, no longer will you look at something in your world, such as Uluru, and only think of it as an interesting place to visit. Instead, you will begin to ask questions about how it was formed and came to look the way it does. You will also start to ask questions about the area in which it is located, its vegetation, how it is managed and its significance for Aboriginal and Torres Strait Islander peoples.

Here is an example of how to begin planning a geographical inquiry into Uluru. You can see that this geographer has chosen one key inquiry question to focus on, and made some notes about how they might begin to find answers.

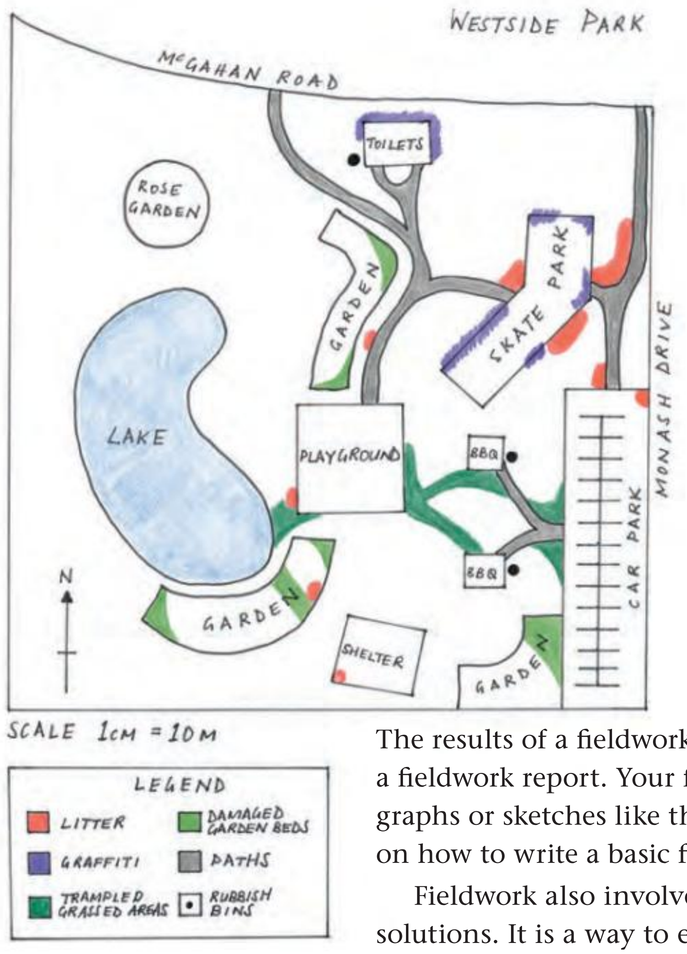
Source 2 A guide for planning the direction of a geographical inquiry

Key inquiry question	Data needed	Possible sources of data
Is it a good thing that so many tourists visit Uluru–Kata Tjuta National Park?	• Information on the importance and significance of Uluru to the Anangu, who are the Aboriginal people in the area • Information on the management and maintenance of the park	• Conduct fieldwork into visitor numbers • Create surveys and questionnaires for visitors to complete • Contact Parks Australia and Uluru–Kata Tjuta National Park for information on how the park is managed • Download resources from the Parks Australia website, e.g. podcasts, maps, visitor guides, geological reports, audio tours and images

Source 3 Uluru

Check your learning
Log onto your obook pro to complete the questions for topic 1.3.

1.4 Conducting fieldwork



Source 4 This sketch map has been completed by a student conducting fieldwork at Westside Park.

Conducting fieldwork is a skill that you will develop over time as you study geography. Fieldwork is any geographical study that takes place outside the classroom or office – or, as geographers say, 'in the field'. The 'field' is the source of geographical information (primary data). It can be conducted at a number of scales – in your school grounds, within your local community, in another state or even in another country. Fieldwork is an essential part of geography because the world outside the classroom is the geographer's 'laboratory'.

Fieldwork provides the opportunity for first-hand investigation of both natural and built environments, and the development of skills associated with observing, measuring and recording. Different forms of geographical data can be collected and analysed to find relationships between the natural and human environments. The results of a fieldwork investigation are presented and communicated in a fieldwork report. Your fieldwork report might include geographical images, graphs or sketches like the one in Source 4. You can find a key skill worksheet on how to write a basic fieldwork report on your obook pro.

Fieldwork also involves identifying issues or problems and finding possible solutions. It is a way to engage with the real world and make a contribution to developing more sustainable and fair ways to manage the Earth's resources.

Key skill worksheet
Conducting fieldwork: Writing a basic fieldwork report

Different types of fieldwork

Most topics you learn about in class can also be studied during fieldwork. The types of fieldwork you conduct will differ according to the topic and the places you visit, but all these activities will help you to better understand your world. Source 5 provides examples of fieldwork locations and activities for a range of topics.

Source 5 Examples of fieldwork locations and activities for a range of topics

Topic	Possible location	Sample fieldwork activity
Water in our environment	Local river or stream	Water sampling
Water as a resource	Water treatment plant, desalination plant or dam	Taking geographic photographs
Growing cities	Edge of a large city	Observing and describing
Changing cities	Urban renewal project	Land use mapping

Check your learning
Log onto your obook pro to complete the questions for topic 1.4.

1.5 Interpreting geographical images

Check your learning
Log onto your obook pro to complete the questions for topic 1.5.

Like maps and graphs, geographers use geographical images as sources of data. These include a range of geographical photos. Such photos are different to those that you take for fun; in fact geographical photos are taken to depict and present a place or particular feature of the landscape that is being studied. The different types of photos are explained below.

Ground-level photograph

The camera is held by someone at the same level as the landscape being photographed.

This angle allows you to clearly see the height of any object and the detail in vertical surfaces.

However, objects such as the trees on the left-hand side of the image hide the landscape behind them.

Oblique aerial photograph

The camera is positioned above the landscape and angled towards the scene being photographed.

This angle allows you to see both the foreground and the background of the scene. You can also see both the height of an object and its width or area.

Vertical aerial photograph

The camera is positioned directly above the landscape. This vertical (or plan) view allows you to see the extent of any feature.

However, it is difficult to judge the height of the trees or the depth of the water from this view.

Satellite image

This image is taken from space. It allows us to see large areas of the Earth's surface. These images are often used to investigate patterns. It is difficult, however, to see smaller features of the environment.

1.6 Analysing maps

map
a simplified plan of an area shown from directly above

An important skill in geography is the ability to identify and explain patterns in the world around you (see page 26). Often these patterns appear on a **map**. In fact, you will also create your own maps to display data you have found during fieldwork or through research.

Before doing so, it is important to develop an understanding of the essential features that appear on maps and how to read them. You will develop your skills in map reading and analysis over time. You can refer to these pages throughout your study of geography if you need help understanding the features of simple and complex maps.

Essential features of maps

plan view
a way of showing something as if the viewer is looking down on it from above; a bird's-eye view

Maps are drawn in the **plan view** (directly from above) because this ensures the scale will be the same across the entire area. If maps were drawn from an angle, some parts of the mapped area would look distorted and so it would not be an accurate representation of the area. When properly used, maps can reveal a great deal about our planet and the ways in which we use it.

BOLTSS

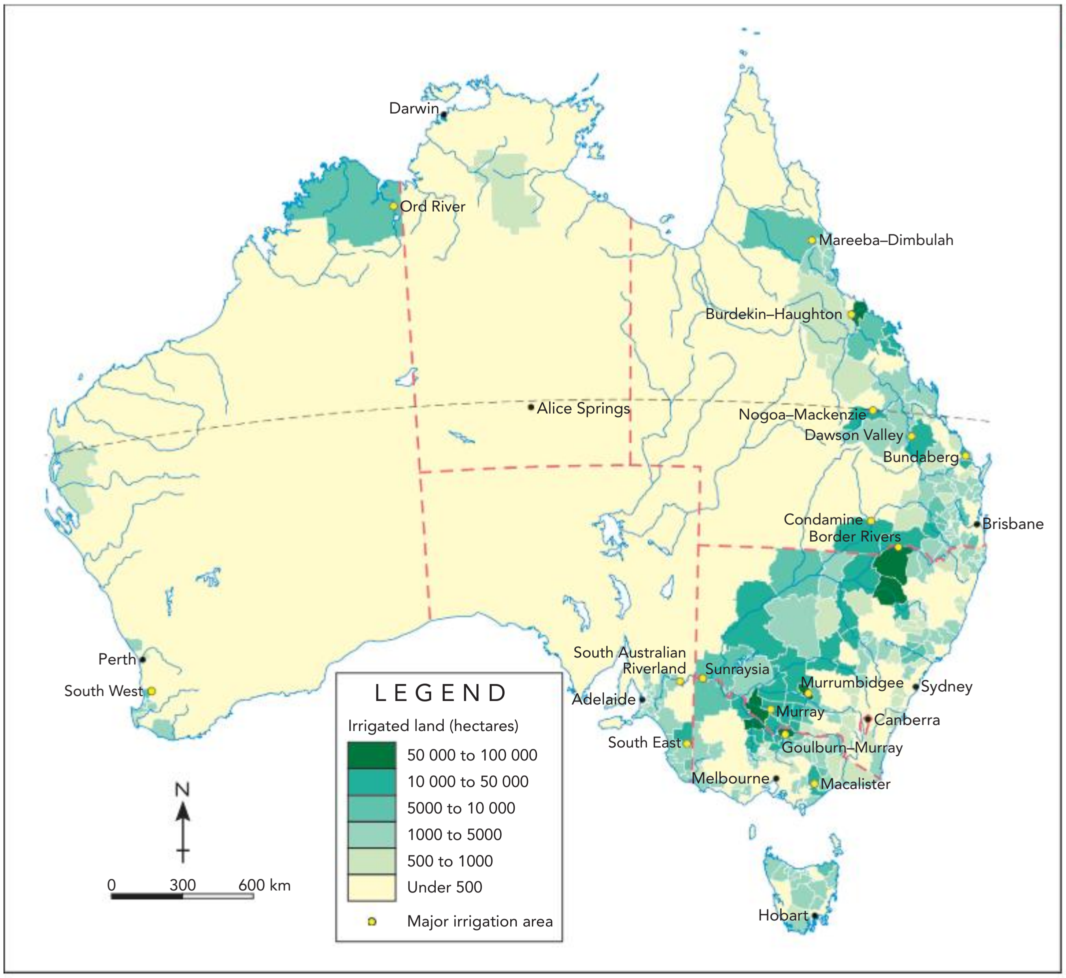
Key skill worksheet
Analysing maps: Understanding BOLTSS features

Regardless of the type of maps you are creating or analysing, all will share some common features. There are six features that ensure every map is drawn in a clear, concise and accurate way. To help you remember these features, you can use a mnemonic (memory aid) that consists of the first letter of each of the features: border, orientation, legend, title, scale and source. Together, these six letters make up the acronym BOLTSS.

B	Border – an outline or box drawn around the map
O	Orientation – an indication of direction, usually shown with a north arrow or compass rose
L	Legend – an explanation of the symbols, colours and patterns used on the map (also known as a key)
T	Title – a heading that describes the map and what it is showing
S	Scale – a way of indicating what distances on the map represent in the real world. Scale can be shown in three different ways: as a written scale, a line scale or a ratio. Source 9 on page 18 shows the three ways a scale can be represented on a map.
S	Source – where the information used to create the map came from. If these details are not known, simply write 'Source: unknown'. If you have created the map from your own data, simply write 'Source: own map' or 'Source: [add your name]'.

Source 6 The six features of BOLTSS

AUSTRALIA: IRRIGATED LAND



Source 7 A map of Australia showing all the features of BOLTSS Source: Oxford University Press

Key skill worksheet
Analysing maps: Understanding direction

Direction

Direction must always be shown on maps because it enables the user to work out the location of features shown. Direction is shown on maps by the use of compass points. A compass is an instrument, used for navigation, with a magnetised needle that will always point to the Earth's magnetic field near the North Pole, known as **magnetic north**. The face of a compass shows a circle made up of 360 degrees (see Source 8).

The four main directions on a compass are north, south, east and west, and these are called the **cardinal points**. Most maps are oriented to north. Once north has been established, you can find the other points of the compass. Using compass points is an accurate way of giving directions because the compass always points to magnetic north no matter which direction you are facing.

Compass bearings provide an even more precise way to give directions. A bearing is an angle that is measured clockwise from magnetic north. The bearing of magnetic north can be either 0 degrees or 360 degrees, the bearing of south is 180 degrees, the bearing of east is 90 degrees and the bearing of west is 270 degrees. These bearings are also shown in Source 8.

Source 8 A compass face, showing cardinal points and compass bearings

direction
a way of orienting a map, usually shown by the use of compass points, such as north

magnetic north
the physical place on the Earth, near the North Pole, to which a magnetised needle points

cardinal points
the four main directions: north, south, east and west

compass bearings
a precise way of giving compass directions, such as '135° south-east'

Scale

Maps are scaled representations of real areas. These representations have been designed to fit on a piece of paper or on a computer screen. Maps look the same as the real areas they are representing, just reduced to a size you can work with. Scale on maps allows you to work out the distances in the real world.

Look at the map of Tasmania in Source 9. In the bottom left-hand corner it shows the three types of scale that can be used on maps and how they work:

- A *written scale* tells you how much a distance on the map represents on the ground. The written scale on Source 9 is: 'One centimetre on the map measures 30 kilometres on the ground.' Using this information, we can easily work out that 5 centimetres on the map would be equal to 150 kilometres on the ground, and so on.
- A *line scale* is a numbered line that acts like a ruler. You can use it to measure distances on the map. The Source 9 line scale shows that 1 centimetre is equal to 30 kilometres.
- A *ratio scale* shows scale in numbers. The ratio scale for Source 9 is 1:3 000 000, so 1 unit (that is, 1 centimetre) on the map represents 3 000 000 centimetres on the ground. Of course, 3 000 000 centimetres is equal to 30 kilometres.

TASMANIA

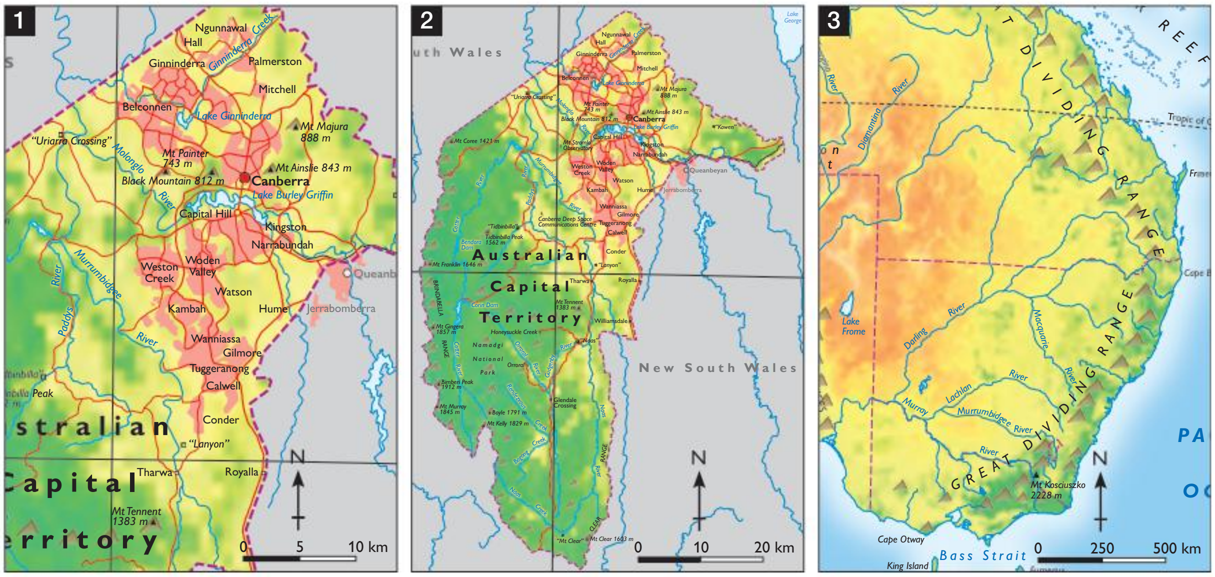
Source 9 Source: Oxford University Press

Comparing map scales

Maps are often shown at different scales, depending on the amount of detail they need to show. Source 10 shows three maps at different scales:

- Map 1 is a large-scale map. It shows a large amount of detail, but only a small area. You can see the Canberra city area (in pink) and Lake Burley Griffin.
- Map 2 is a medium-scale map. It shows a medium amount of detail and a medium area. You can see the whole of the Australian Capital Territory.
- Map 3 is a small-scale map. It shows a small amount of detail, but a large area. You can only just see the border of the Australian Capital Territory.

AUSTRALIAN CAPITAL TERRITORY AND EASTERN AUSTRALIA



Large-scale maps show detailed information about a small area.

Small-scale maps show general information about a large area.

Source 10

Source: Oxford University Press

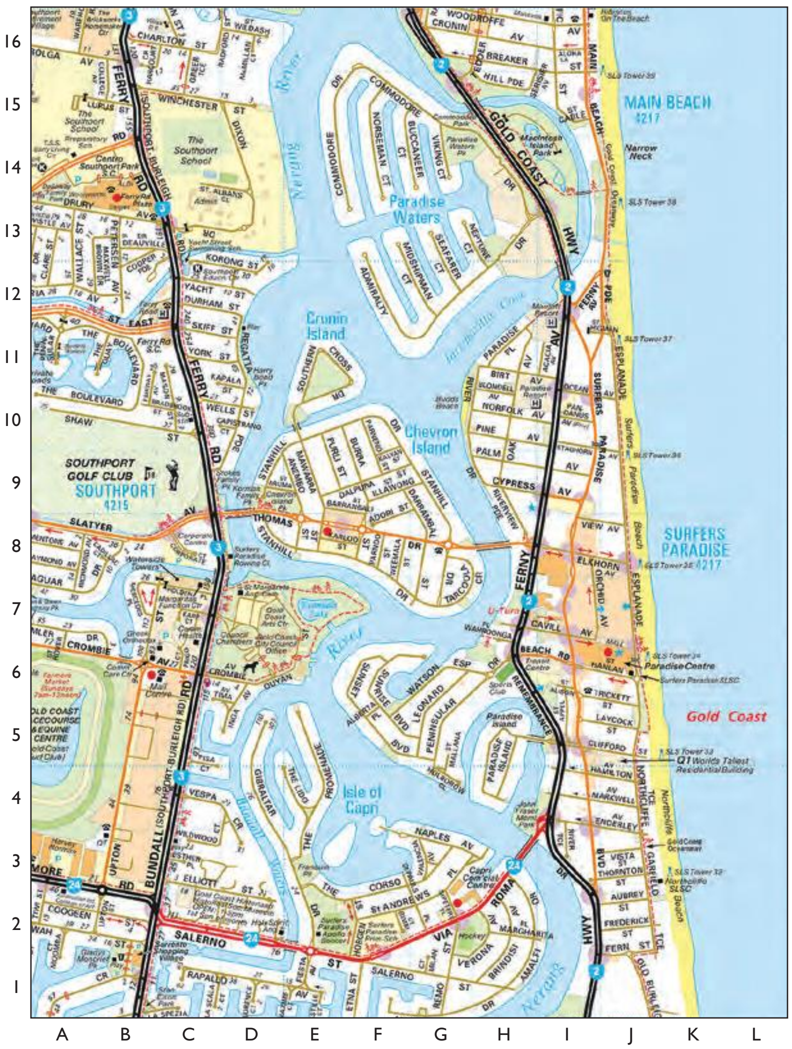
Locating places on maps

alphanumeric grid referencing
a coordinate system on a grid in which each cell is identified by a combination of a letter and number; using this system makes it easy to locate a specific position on a map

Maps are used for many different purposes, but the most commonly used maps help us to find things we are looking for. These maps are often overlaid with a set of lines that form a grid. The gridlines divide the map into smaller areas and help us find places more easily.

There are a number of ways in which you can locate things on maps, and a number of methods you can use to help other people find these places. Some of these methods will give you a general idea of where something is, while others can help you pinpoint the exact location of something.

SURFERS PARADISE STREET MAP



Source 11 Source: *Brisway*

topographic map
a map that shows the shape of the land, its relief and landforms

Grid and area referencing

Alphanumeric grid referencing

In maps that use **alphanumeric grid referencing**, the spaces between gridlines are labelled with letters and numbers. The letters appear along the bottom (or top and bottom) of the map while the numbers appear down the left-hand side (or both sides) of the map. For example, in Source 11 the grid reference for the Paradise Centre is J6.

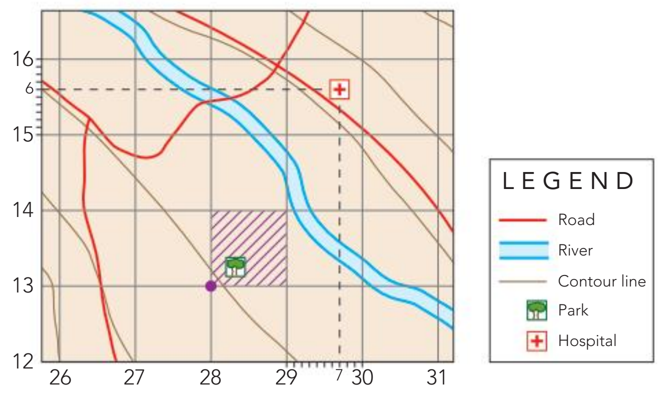
Area referencing (AR)

The area referencing (AR) method is used on **topographic maps** that have gridlines. Each line is given a two-digit number. The lines that run up and down the map (that is, vertically) are known as eastings (because the numbers increase as you move east). The lines that run across the map (that is, horizontally) are known as northings (because the numbers increase as you move north). A four-figure AR will pinpoint the bottom left-hand corner of the grid square in which you will find the feature. The eastings are given first, then the northings. For example, in Source 11 the park is located in AR2813.

Six-figure grid referencing (GR)

The six-figure grid referencing (GR) method helps locate exact points on a topographic map. The area between each easting is divided into ten further parts (tenths), as is the area between each northing. This is just like adding a finer set of gridlines over the existing gridlines, allowing you to be very specific about where things are within each grid square. As with AR, the eastings are given first, then the northings. The difference is that one more figure is added to the easting and one more figure is added to the northing. This makes six figures in total. For example, in Source 12 the hospital is located at GR297156.

TOPOGRAPHIC MAP EXTRACT SHOWING AR AND GR



Source 12 Source: Oxford University Press

Latitude and longitude

Maps that show large areas of the Earth's surface (such as world maps) use a set of imaginary lines that form a grid. These gridlines, known as **latitude** and **longitude**, help us to locate places accurately.

- Lines that run from east to west are known as lines (or parallels) of latitude.
- Lines that run from north to south are known as lines (or meridians) of longitude.

Each of the lines is separated by degrees rather than distance, because the world is round, not flat.

The line of latitude midway between the North Pole (90 degrees north) and the South Pole (90 degrees south) is known as the **Equator**, which is located at 0 degrees latitude. It divides the Earth into the Northern Hemisphere and the Southern Hemisphere.

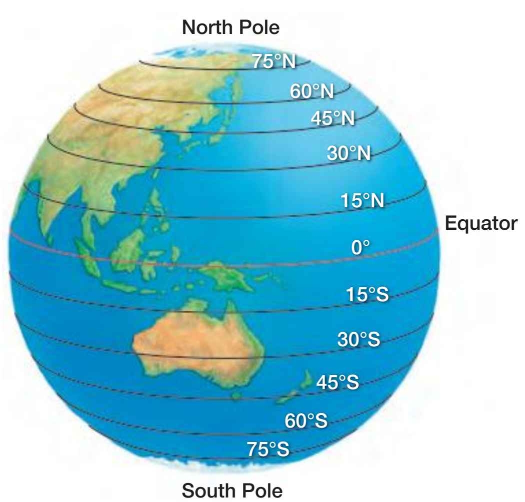
- Lines of latitude are measured in degrees north and south of the Equator.
- Lines of longitude are measured east and west of the **prime meridian** (also known as the Greenwich meridian), which is located at 0 degrees longitude.

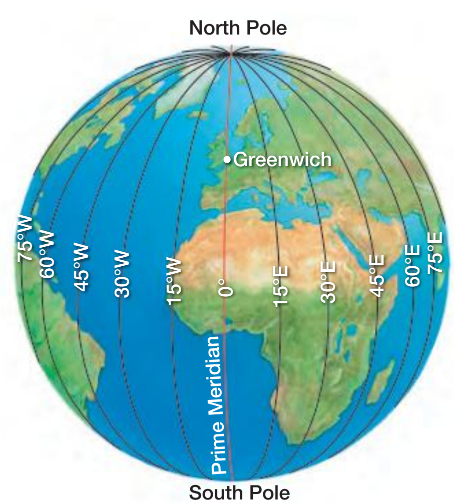
latitude
imaginary lines running east–west around the Earth's surface, parallel to the Equator, used to work out location and direction

longitude
imaginary lines running north–south around the Earth's surface, from the North Pole to the South Pole, used to work out location and direction

Equator
an imaginary line that runs around the middle of the Earth, separating the Northern Hemisphere from the Southern Hemisphere

prime meridian
an imaginary line of longitude that runs from the North Pole to the South Pole; longitude is defined as 0 degrees at the prime meridian





Source 13 Left: lines (or parallels) of latitude; right: lines (or meridians) of longitude

Key skill worksheet
Analysing maps: Understanding six-figure grid referencing and topographic maps

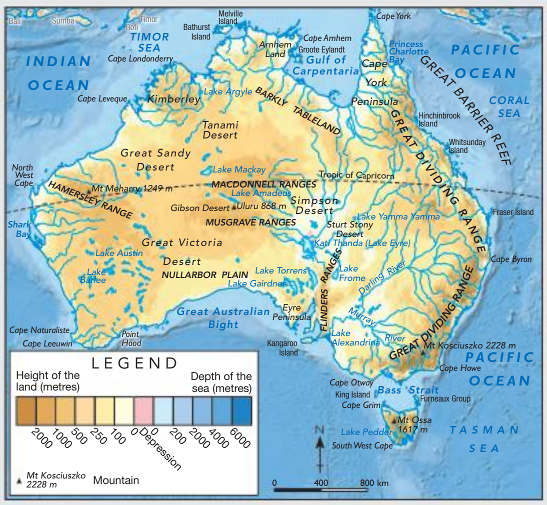
Simple maps

Geographers use different types of maps to show a whole range of different natural and built features – and to analyse the connections between them.

Physical maps

Physical maps show the locations and names of natural features of the Earth. These may include deserts, mountains, rivers, plains, oceans, reefs, volcanoes and lakes.

PHYSICAL MAP OF AUSTRALIA SHOWING OCEANS AND MAJOR MOUNTAIN RANGES, RIVERS, LAKES AND DESERTS



Source 14 Source: Oxford University Press

Political maps

Political maps show the locations and names of built features of the Earth. These may include country borders, state and territory borders, cities and towns.

POLITICAL MAP OF AUSTRALIA SHOWING STATE AND TERRITORY BORDERS, CITIES AND TOWNS

Source 15 Source: Oxford University Press

Dot distribution maps

Dot distribution maps use dots (or shapes) to represent (and sometimes compare) a range of different features. The dots show the location of the chosen feature. The size and colour of the dots on the map can show different characteristics of that feature. For example, in Source 16, small towns are shown as small green dots and big cities are shown as big purple squares. Other dot distribution maps show the location of a single feature (for example, see Source 11 on page 191 of topic 6.8). Dot distribution maps help to show patterns and links between features – geographers refer to this as spatial distribution.

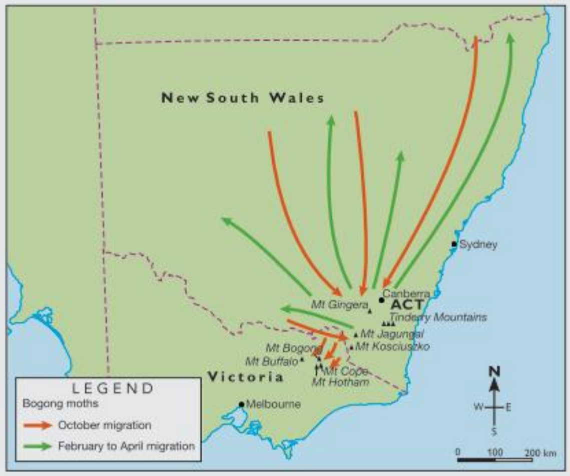
DOT DISTRIBUTION MAP OF AUSTRALIA SHOWING POPULATION

Source 16 Source: Oxford University Press

Flow maps

Flow maps show movement from one place to another. Arrows of different thicknesses or colours are used to show where different things (such as people, goods or animals) are moving to and from, and to compare the numbers involved in the movement.

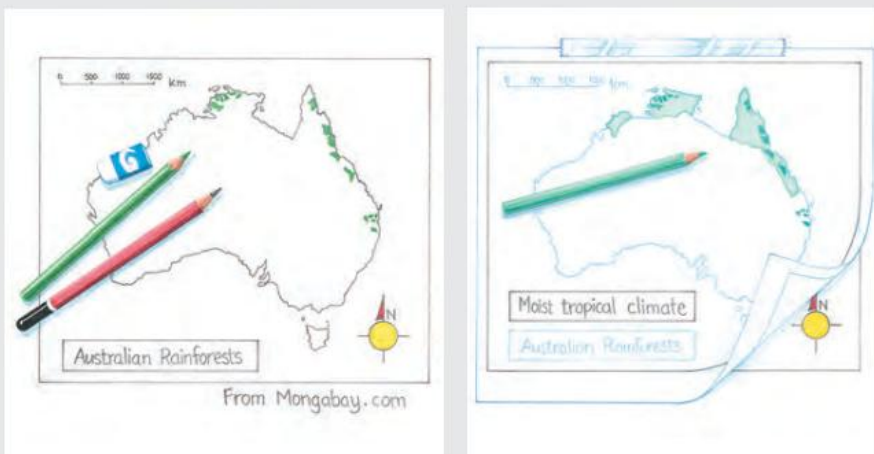
FLOW MAP SHOWING BOGONG MOTH MIGRATION ROUTES



Source 17 Source: Oxford University Press

Overlay maps

Overlay maps show how features on the Earth's surface may be related to each other. To create an overlay map, you first need to produce a base map showing one feature (such as the location of Australian rainforests) and then place a piece of tracing paper or plastic sheet over this base map showing the other feature you are investigating (such as areas with a moist tropical climate).

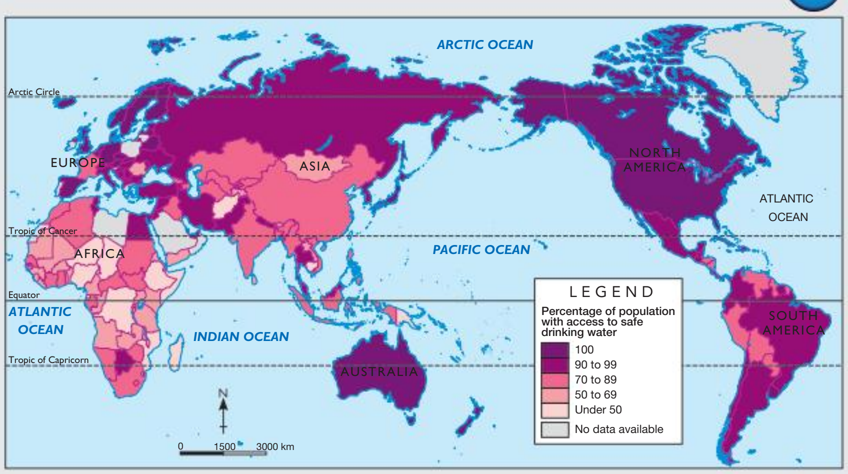


Source 18 An overlay map showing the location of Australian rainforests on a base map (top) and areas with a moist tropical climate on an overlay (bottom)

Choropleth maps

Choropleth maps use different shades of the same colour to give a quick impression of the pattern formed by the data being shown. Darker shades show the highest values or the greatest amounts, while lighter shades show the lowest values or the least amounts.

CHOROPLETH MAP SHOWING WORLD ACCESS TO SAFE DRINKING WATER



Source 19 Source: Oxford University Press

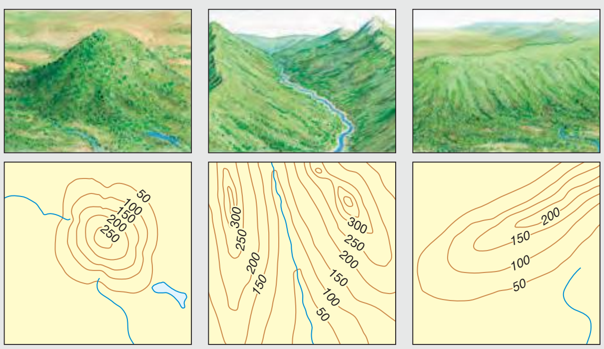
contour lines
lines drawn on a map that connect points at the same height to show the height and steepness of land

More complex maps

Geographers also use a number of more complex maps to represent information. Some of these are outlined below.

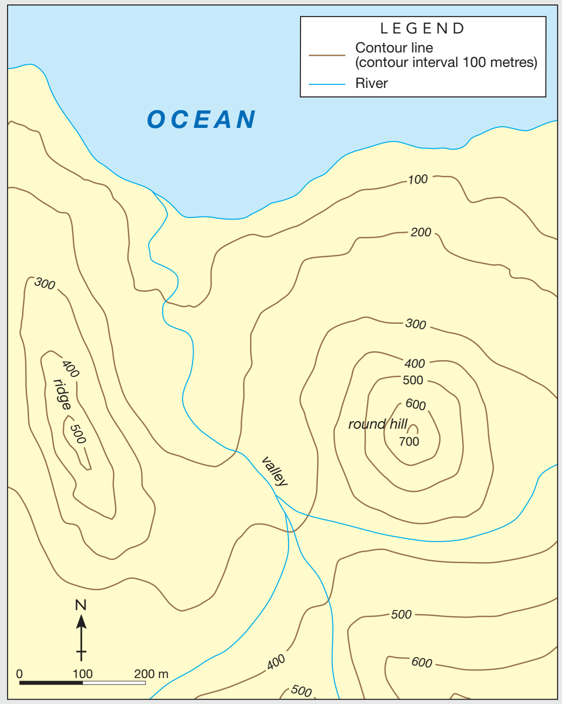
Topographic maps

Topographic maps show the shape of the land (such as the shapes formed by valleys, hills and ridges) by using **contour lines**. Numbers on some of the contour lines show the height of the land above sea level. The closer together the contour lines are, the steeper the land. Symbols and colours are also used on topographic maps to show other natural features (such as forests, rivers and lakes) and built features (such as towns, roads and mines). The contour patterns of three common features are shown below.



Source 20

TOPOGRAPHIC MAP SHOWING A ROUND HILL, A VALLEY AND A RIDGE



Source: Oxford University Press

Weather maps

Weather maps show conditions in the atmosphere, such as air pressure, wind speed and wind direction. They also show the size and location of warm and cold fronts. Weather maps are also known as synoptic charts. They are most commonly seen on the nightly television news.

Source 21 Weather maps feature on the nightly news on television.

Thematic maps

Thematic maps show a particular theme or topic; for example, the distribution of resources (such as coal and gas), the different types of forests around the world, access to safe drinking water, or the types of animals and crops farmed in Australia.

THEMATIC MAP OF AUSTRALIA SHOWING TYPES OF ANIMALS AND CROPS FARMED

Source 22 Source: Oxford University Press

Geographic Information Systems (GISs)

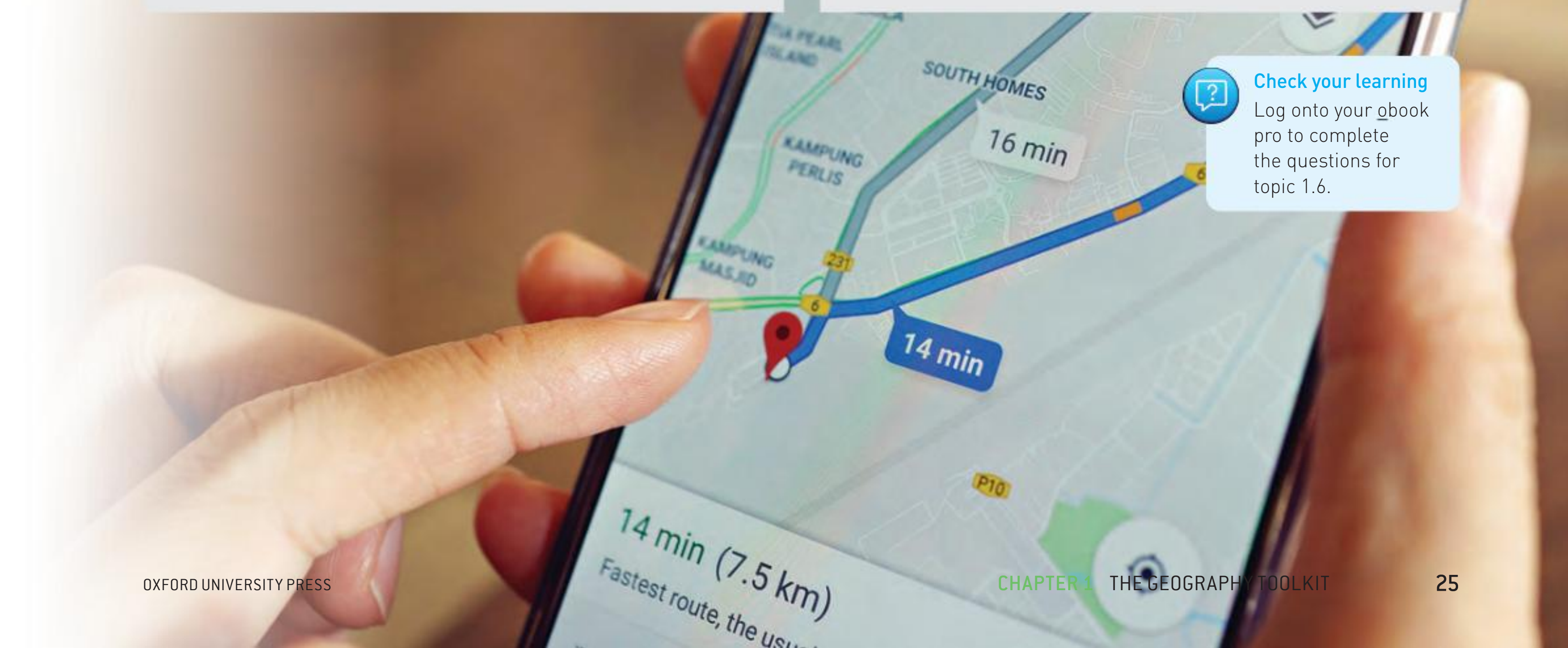
Geographic Information Systems (GISs) are a way of creating, viewing, organising and analysing geographical information with the use of an app. GIS allows geographers to access and share an incredible amount of data and look at the world in new ways.

GISs are made up of three elements:

- digital base maps
- data that is layered over the base map (such as a chart, overlay or table)
- a software app or platform that links these elements and allows the user to interact with all of this information.

GISs combine satellite images, graphs and databases to allow you to identify patterns and trends so that you can gain a better understanding of the world around you. They allow you to turn different layers of data on and off to isolate exactly what you are looking for. You can even create and share your own maps, look at 3D models of areas and record video simulations, known as flyovers.

GISs are already a part of many people's everyday life. Governments, companies and individuals all around the world use GISs. There are a number of GIS platforms available today, but one of the most commonly used and free GISs is Google Earth.



Check your learning
Log onto your obook pro to complete the questions for topic 1.6.

1.7 Identifying patterns and relationships

In geography, an important skill to master is that of identifying trends, patterns and relationships in the information you are looking at. There are two main ways to do this: the PQE method and the SHEEPT method.

PQE method

PQE is a tool used by geographers to analyse the data they have gathered (such as maps, tables, graphs and diagrams) and reach conclusions. The letters PQE stand for:

- *pattern* – when looking at data, look for things that stand out or form patterns; a pattern may be a group of similar features on a diagram, a concentration of a particular feature on a map, or a particular shape that is created by data on a column graph
- *quantify* – in this step, read the map closely to try to quantify (measure) statistics, amounts, sizes and locations to find a pattern (or patterns)
- *exceptions* – often you may find that there are things in your data that do not fit into a pattern you have identified; these are called exceptions. They also need to be identified and quantified.

Source 23 shows how the PQE method can be used to describe the distribution of major cities on a physical map of Australia (Source 24). Read the highlighted sections closely. These are sentence starters that can be used to structure your response whenever you use the PQE method.

If you can identify the type of map that you are looking at, make sure that you name it. See topic 1.6 on pages 16 to 25 of the toolkit for an overview of different types of maps.

The uneven pattern of this political map shows that Australia's most populated cities are located along the east coast and in the south-east of the country.

The evidence that quantifies this pattern is the coastal location of capital cities and other major cities on the continent. These large cities include Cairns, Townsville, Brisbane, Gold Coast, Newcastle, Sydney, Melbourne, Geelong, Hobart and Adelaide.

The exception to this pattern is Darwin and Perth. While both of these cities are located in coastal areas, they are in the north and the west respectively, and are isolated from the concentration of the cities on the other side of the country.

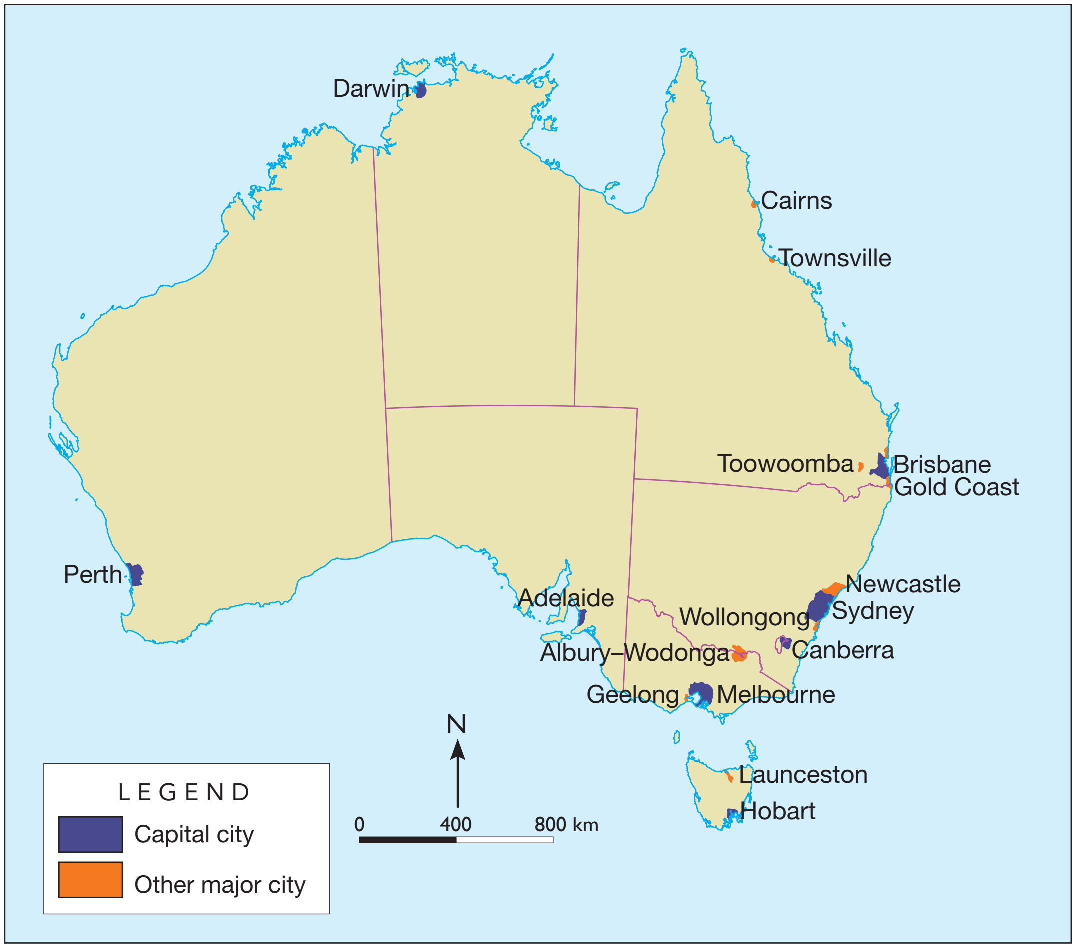
Pattern – in this step, you need to give a general overview of any patterns you may identify.

Quantify – in this step, you need to add specific and accurate information to define and explain the pattern.

Exception – in this step, you need to identify anything that does not fit the pattern.

Source 23 Example of how to use the PQE method

PHYSICAL MAP OF AUSTRALIA SHOWING MAJOR CITIES WITH POPULATIONS OVER 100 000



Source 24

Source: Oxford University Press

Check your learning

Log onto your obook pro to complete the questions for topic 1.7.

SHEEPT method

SHEEPT is a tool used by geographers to help them consider the many factors that may contribute to the patterns identified in their data. When you are examining issues related to your inquiry, it is useful to think about them in terms of these six factors (see Source 25), and rank them in order of importance. This will help you reach your conclusions.

S	Social – factors relating to culture and people
H	Historical – factors relating to past events
E	Environmental – factors relating to the natural environment (including climate, landforms and vegetation)
E	Economic – factors relating to the earning or spending of money (including income earned from industry and tourism and the cost of building a dam or highway)
P	Political – factors relating to governments (including laws, regulations and policies)
T	Technological – factors relating to the availability and use of different types of technology (including the development of greener technologies, alternative energy sources and GIS)

Source 25 The six factors that make up SHEEPT

1.8 Collecting and representing data

In geography, an important skill to master is that of collecting and representing data. In any geographical inquiry, you will collect data that helps you answer your key question.

Geographers find answers to their questions in many places. They may collect information themselves by interviewing people, taking photographs, making sketches out in the field or conducting surveys and questionnaires. This kind of information will generally only be relevant to a particular inquiry and is called **primary data**.

Often, a geographer collects information that supports their inquiry but has not been specifically collected or designed by the geographer for the inquiry. This type of information is called **secondary data**.

primary data
data for a geographical inquiry that was collected in the field by the geographer conducting the inquiry (e.g. survey data, hand-drawn maps and photographs)

secondary data
data for a geographical inquiry that was not collected by the geographer conducting the inquiry (e.g. textbooks, atlases and government websites)

census
a 'head count' or audit of the number of people living in a particular place at a particular time

Source 26 Examples of primary and secondary data

Some examples of primary data	Some examples of secondary data
• Hand-drawn maps and field sketches • Photographs and images taken for the inquiry • Questionnaires and surveys designed and created for the inquiry • Graphs created from data (such as number of visitors, number of cars counted, and temperature and wind statistics) gathered by the geographer for the inquiry	• Information from textbooks, atlases, maps, graphs, reports and websites that were not created specifically for the inquiry • Data that was collected by a government department (such as census data), the media, companies and other organisations, and not collected specifically for the inquiry

Distinguish between quantitative and qualitative data

Key skill worksheet
Collecting & representing data: Distinguishing between quantitative and qualitative data

Primary and secondary data provide either quantitative data or qualitative data.

- *Quantitative data* includes anything that can be recorded as numbers – for example, 'Uluru is 3.6 kilometres long and 1.9 kilometres wide, and has a circumference of 9.4 kilometres'.
- *Qualitative data* includes anything that can be recorded in words – for example, 'Uluru, one of Australia's best-known natural landmarks, is very large'.

Source 27 Examples of quantitative and qualitative data

Some examples of quantitative data	Some examples of qualitative data
• Climate and temperature statistics • Tourist numbers • Population figures • Types and amounts of food grown • Plant and animal species in certain areas • Numbers of people killed in natural disasters • Numbers of volcanic eruptions and earthquakes	• Opinions • Points of view • Personal stories • Likes and dislikes • Feelings

Good geographical inquiries will always be based on a combination of primary and secondary data that is both quantitative and qualitative. Even though qualitative data is an important part of any geographical inquiry, quantitative data is considered to be more valuable because it is less open to personal interpretations and can be more accurately represented in graphs and charts.

It is also important to check that you have recorded all your data without errors, and that it is balanced and fair. Your data should not reflect your personal opinions or emotions; instead it should present the facts.

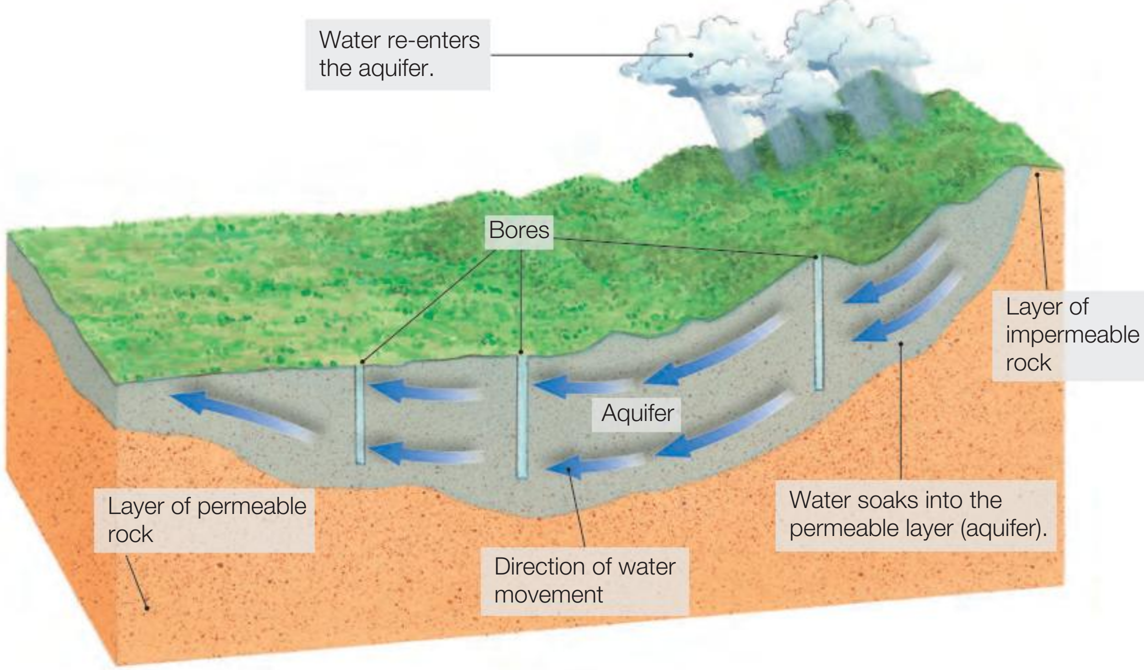
Create maps and other graphic representations

In addition to maps, geographers use a range of other visual representations to communicate information they have collected.

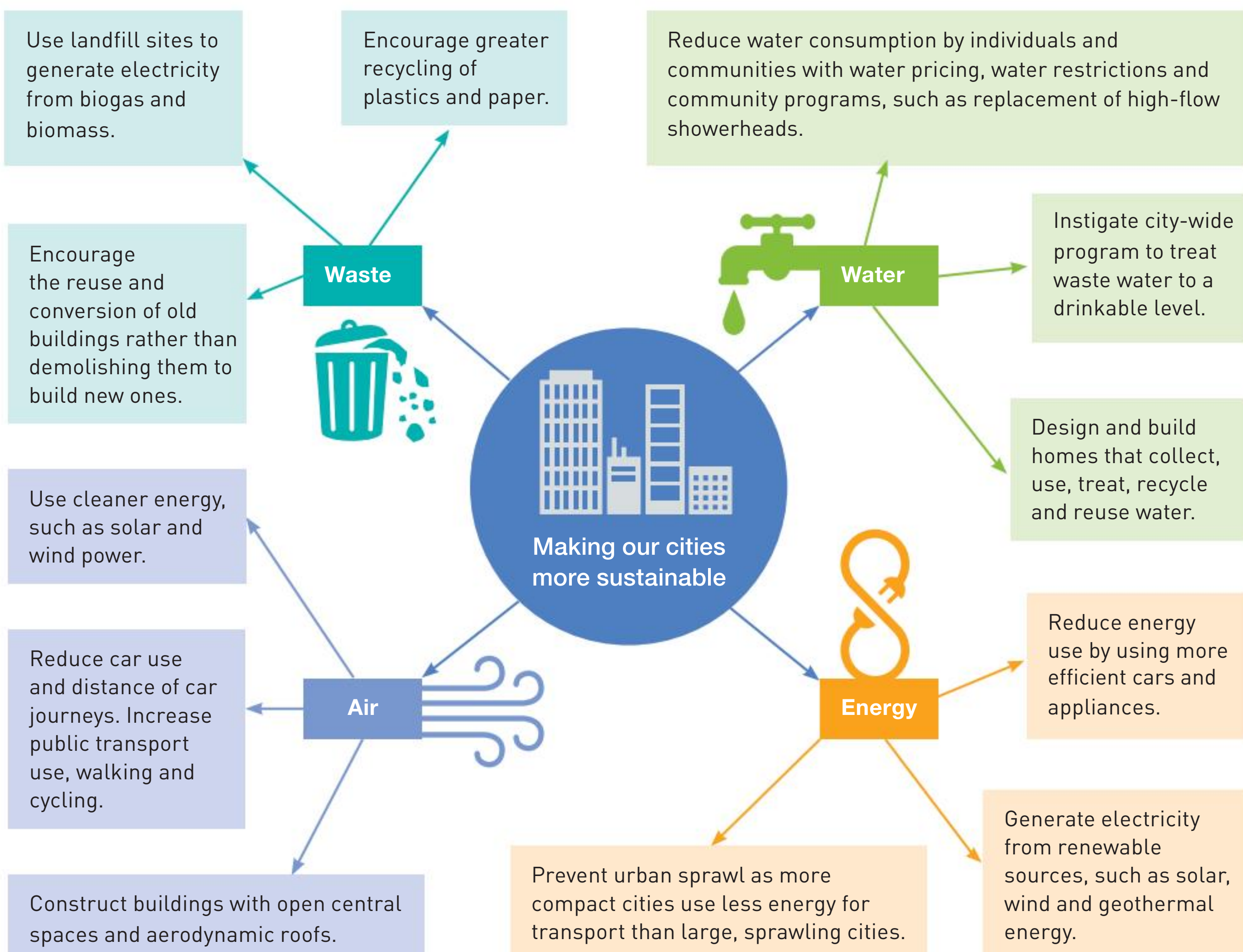
- *Tables* allow geographers to represent and compare data by organising it under different headings (see Source 28).
- *Diagrams* allow geographers to show the features or characteristics of some places or things much more effectively than describing them in words (see Source 29 on the following page). A concept map is a handy tool that you might use to show a complex idea, such as strategies for sustainability (see Source 30 on the following page).
- *Graphs* allow geographers to compare data and represent it in an interesting and attractive way. There are a number of different types of graphs used by geographers for different purposes. Some kinds of graphs are simple, while others are more complex. The most common ones are explained on the following pages.

Source 28 A table showing the populations of Australian states and territories in 2020

State/territory	Population	Percentage of Australia's population
New South Wales	8 166 400	31.8%
Victoria	6 680 600	26.0%
Queensland	5 184 800	20.1%
Western Australia	2 667 100	10.4%
South Australia	1 659 800	6.9%
Tasmania	541 100	2.1%
Australian Capital Territory	246 500	1.7%
Northern Territory	431 200	1.0%
Australia	**25 577 500**	**100%**



Source 29 A diagram can be an effective way of explaining a complex idea. This diagram shows how bores can be drilled to enable access to underground water.



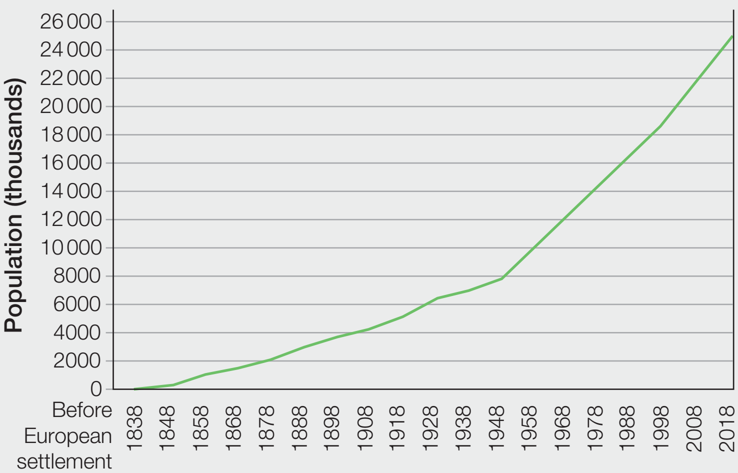
Source 30 A concept map showing strategies for a more sustainable city

Simple graphs

Graphs are one of the most effective visual representations when it comes to showing numerical (or quantitative) data. This year you will be learning how to create a number of different types of graphs and interpreting the information that they provide. Some simple graphs are described below.

Line graphs

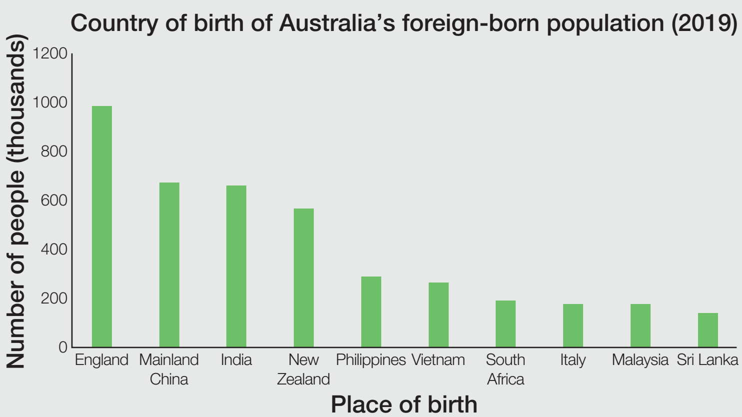
Line graphs show information as a series of points that are joined up to form a line. The line shows a trend or change over time. The horizontal axis (*x*) will usually show units of time and the vertical axis (*y*) will usually show amounts.



Source 31 A line graph showing the increase in Australia's population, 1838–2018

Column graphs

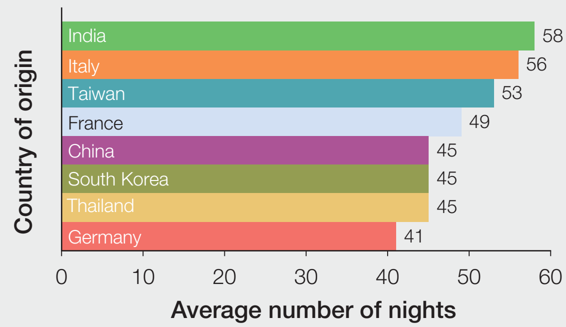
Column graphs are similar to bar graphs, but they show information as a series of vertical columns that are arranged side by side. They are also usually used to compare quantities.



Source 33 A column graph showing the top 10 countries of birth for Australia's overseas-born population in 2019

Bar graphs

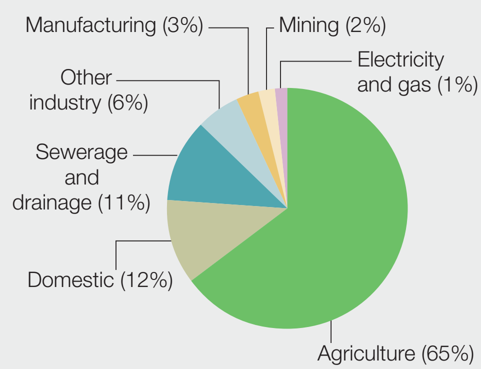
Bar graphs show information as a series of bars that run in a horizontal direction and are stacked one on top of the other. They are usually used to compare quantities.



Source 32 A bar graph showing the average number of nights spent in Australia by tourists from different countries, 2009

Pie graphs

Pie graphs (or pie charts) are shaped like a circle and are divided up so that the information is shown in slices – like the slices of a pie. The circle of 360 degrees represents 100 per cent and each of the slices is a percentage of that. The slices of the 'pie' are usually organised from largest to smallest in a clockwise direction starting from 12 o'clock.



Source 34 A pie graph showing the different uses for water throughout Australia

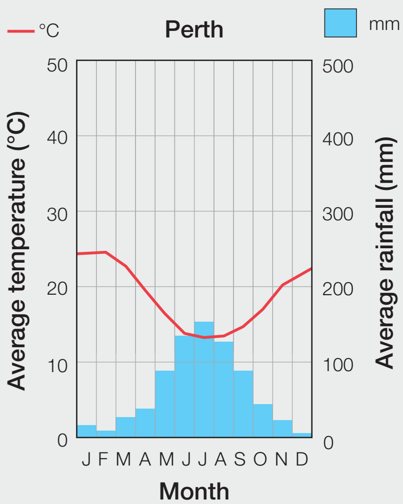
Check your learning
Log onto your obook pro to complete the questions for topic 1.8.

More complex graphs

Over the course of the year you will also be working with a number of more complex graphs. You will not necessarily be creating these yourself, but you will be learning how to make sense of the information they provide. Some of these graphs are described below.

Climate graphs

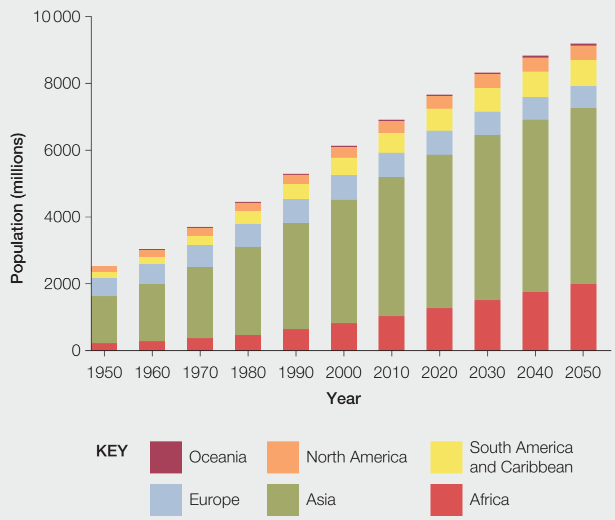
Climate graphs show the average monthly temperature and rainfall for a place over a year. Climate graphs combine line and column graphs. Temperature is recorded as a line graph and rainfall is recorded as a column graph.



Source 35 A climate graph showing the average monthly temperature and rainfall in Perth

Compound column graphs

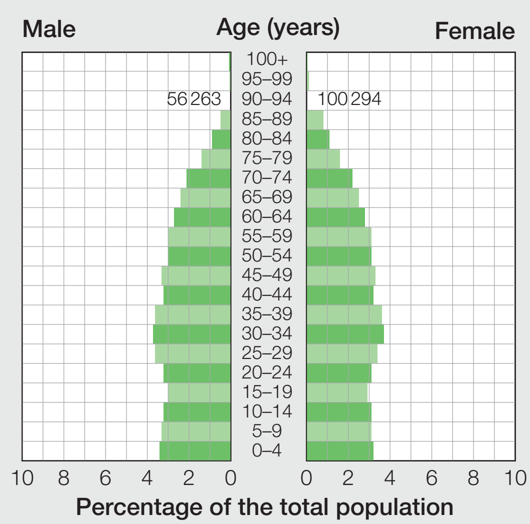
Compound column graphs are a more complex type of column graph in which each column is split into sections, so results can be more easily compared.



Source 36 A compound column graph showing the increase in world population by region, 1950–2050

Population pyramids

Population pyramids are bar graphs that show the percentage of males and females in different age groups in a population. They help geographers identify trends in population growth in a country or other area. Population pyramids are organised so that younger age groups are at the bottom and older age groups are at the top. Percentages of males are placed on the left-hand side and percentages of females are placed on the right-hand side.



Source 37 A population pyramid for Australia in 2020. From it you can see, for example, that there are more females than males over the age of 80.

1.9 Communicating and reflecting

Quizlet
Become familiar with geographical terms by reviewing them on Quizlet.

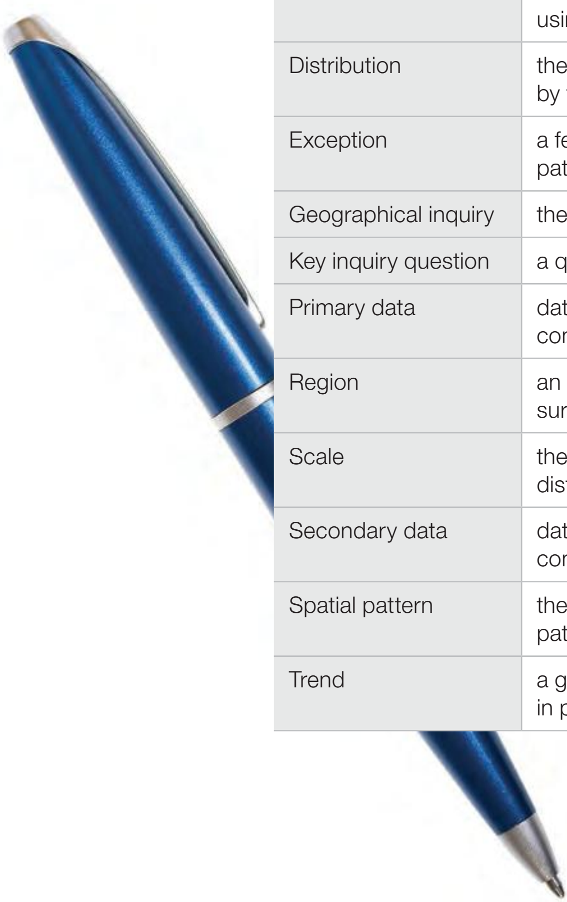
An essential skill for you to develop in geography is that of communicating your findings. Having looked at maps, graphs and other representations of data, it is important for you to be able to put your findings into words.

Use correct geographical terminology

Just like scientists, geographers share a common language. They use geographical terminology to clarify what they are talking about and to share their findings. Source 38 lists and defines some commonly used geographical terms. Additional geographical terms can be found in the glossary definitions throughout the chapters and at the end of this book.

Source 38 Some useful geographical terms

Term	Definition
BOLTSS	a mnemonic (memory device) for remembering the essentials of a map: border, orientation, legend, title, scale and source
Direction	a way of orienting a map, usually shown by the use of compass points, such as north
Distance	the amount of space between two objects or places, generally measured by using the scale on a map
Distribution	the way in which things are arranged on the Earth's surface; the pattern formed by the way objects or places are distributed across a space
Exception	a feature that falls outside a usual pattern or does not follow an observed pattern
Geographical inquiry	the stages that geographers follow to guide their investigations
Key inquiry question	a question that helps geographers to plan and focus their geographical inquiry
Primary data	data for a geographical inquiry that was collected in the field by the geographer conducting the inquiry (e.g. survey data, hand-drawn maps and photographs)
Region	an area of the Earth's surface with a feature that makes it different from surrounding areas
Scale	the relationship (or ratio) between distance on a map and the corresponding distance in the real world
Secondary data	data for a geographical inquiry that was not collected by the geographer conducting the inquiry (e.g. textbooks, atlases and government websites)
Spatial pattern	the distribution of features on the Earth's surface that may form particular patterns, such as linear (in lines), clustered or radial (like spokes on a wheel)
Trend	a general direction in which something is developing or changing (e.g. the trend in population in Australia is positive because the population is growing)



Present findings using a range of communication forms and digital technologies

Geographers use a wide range of methods to inform other people about what they have found over the course of a geographical inquiry. After carefully considering their audience and the purpose of the inquiry, they may choose to communicate their conclusions in one of the following ways:

- written methods, such as essays or reports
- oral forms, such as oral reports, presentations, discussions and debates
- graphic forms, such as maps, graphs and diagrams
- visual forms, such as **annotated visual displays (AVDs)**, photographs, sketches, satellite images and posters
- digital forms, such as Wikis, GISs, databases, 3D models and simulations, and multimedia presentations.

annotated visual display (AVD)
a way of presenting the final results of a research project, incorporating images, graphs, notes and explanations in a poster-style format

KEY SKILL
Communicating & reflecting

Creating an annotated visual display (AVD)

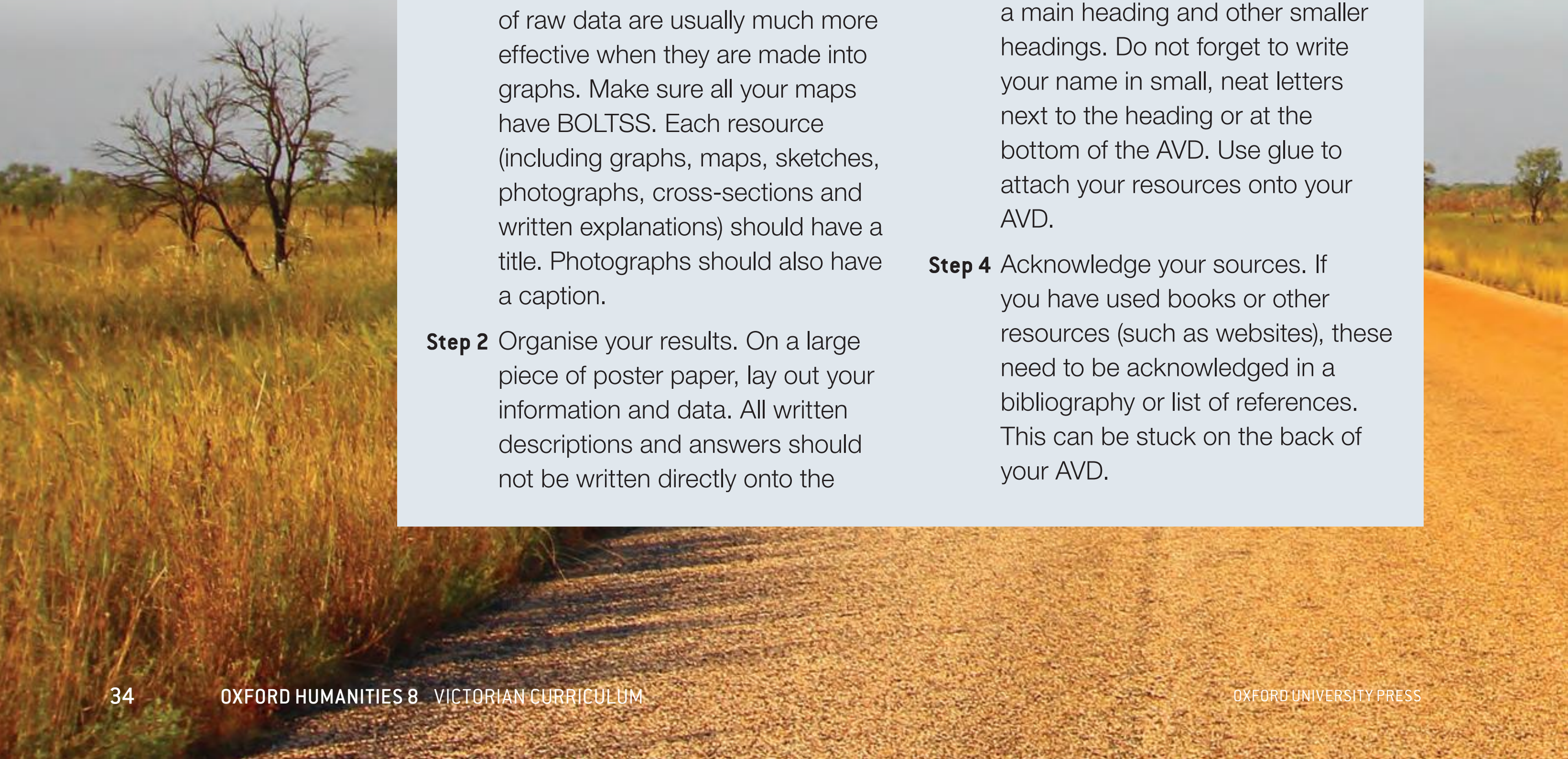
An AVD combines written text with visual images (such as photographs) and other graphic representations (such as maps, graphs, tables, sketches and diagrams). To create a successful AVD, follow these steps:

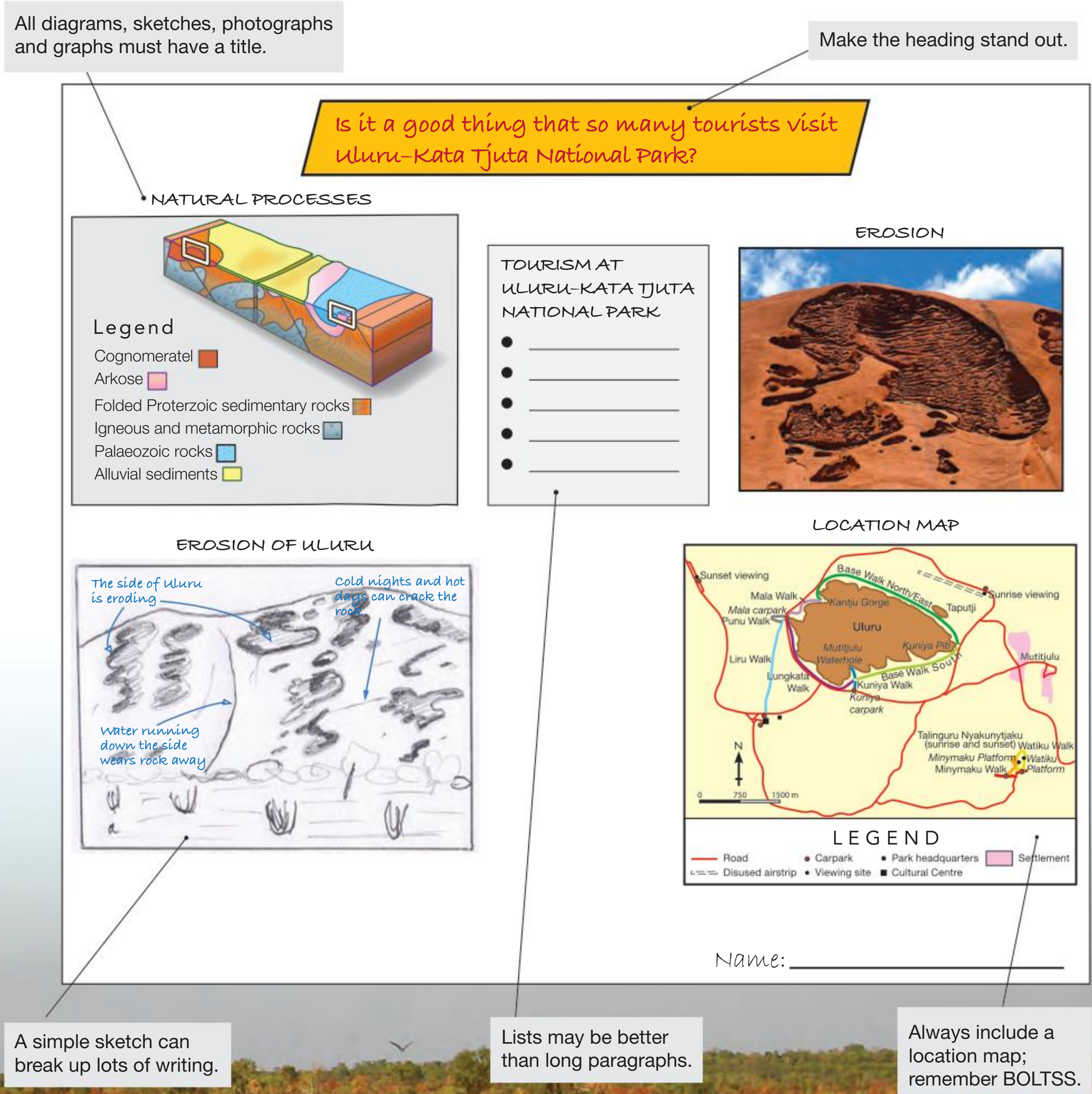
Step 1 Gather your data. Print your photographs, refine your sketches and tidy up any information and data that you have collected. Tables of raw data are usually much more effective when they are made into graphs. Make sure all your maps have BOLTSS. Each resource (including graphs, maps, sketches, photographs, cross-sections and written explanations) should have a title. Photographs should also have a caption.

Step 2 Organise your results. On a large piece of poster paper, lay out your information and data. All written descriptions and answers should not be written directly onto the poster paper, but should be typed or neatly printed on separate sheets of white paper. This will allow you to arrange them on the poster in the most logical and relevant way before you glue them down. The key inquiry question that began your geographical inquiry may guide your final layout. In the example in Source 39, this question acts as the heading for the poster.

Step 3 Present your results. When you are happy with your layout, design a main heading and other smaller headings. Do not forget to write your name in small, neat letters next to the heading or at the bottom of the AVD. Use glue to attach your resources onto your AVD.

Step 4 Acknowledge your sources. If you have used books or other resources (such as websites), these need to be acknowledged in a bibliography or list of references. This can be stuck on the back of your AVD.





Source 39 An AVD

Source: Natural processes illustration © Director of National Parks (Parks Australia) www.parksaustralia.gov.au

Reflect on what you have learnt

Reflecting involves not only looking at *what* you have learnt, but also *how* you have learnt it. It involves asking critical questions about the way in which your geographical inquiry was conducted and your role in it. One of the best ways to reflect on your progress is to complete a self-evaluation checklist like the one in Source 40 – rating your performance and adding comments.

Source 40 A self-evaluation checklist

The title of my geographical inquiry is:		
My geographical inquiry set out to investigate:		
General points	**My rating**	**Comments**
I was able to complete all stages of my geographical inquiry.	1 2 3 4 5	
I was able to answer all my key inquiry questions.	1 2 3 4 5	
I was able to plan my inquiry effectively.	1 2 3 4 5	
My maps, graphs, tables and diagrams were clear and accurate.	1 2 3 4 5	
I was able to analyse my data and reach a conclusion.	1 2 3 4 5	
I was able to communicate my findings in an interesting and appropriate way.	1 2 3 4 5	
Areas of strength		**Comments**
My areas of strength are:		
I'm getting much better at:		
Areas needing improvement		**Comments**
The part I found most difficult was:		
I need the most help with:		

Justify possible methods of response

After reflecting on what you have learnt, you may discover that action is needed in order to respond to the issue you have been investigating. There are a number of different ways that geographers can take action to make a change. These include:

- creating a fact sheet or multimedia presentation to inform your school or community
- using social media to raise awareness and gather support
- emailing your local government representative or member of parliament about the issue
- inviting an expert speaker to give a presentation at your school assembly
- planning a campaign to raise money for the issue.

For example, our geographical inquiry into Uluru – based around the key inquiry question 'Is it a good thing that so many tourists visit Uluru–Kata Tjuta National Park?' (see topic 1.3 on page 13) – may lead us to actively campaign for tourism at Uluru to be managed in a more sustainable way so that this important landmark can be enjoyed by future generations.

Another example is a geographical inquiry into litter that was undertaken at Tilden High School. The inquiry found that green waste, such as food scraps, was a leading cause of recycling contamination at the school, as students and staff were consistently putting waste into the wrong bins. One of the responses was the introduction of bright, clear labelling on existing bins ('Landfill' and 'Recycle') and the introduction of four dedicated compost bins in different locations around the school.

Check your learning
Log onto your obook pro to complete the questions for topic 1.9.

Source 41 One response to the findings of a geographical inquiry

CHAPTER 2

Introduction to landscapes and landforms

The Earth's surface is made up of a vast number of elements that together create amazing shapes and formations. To study and understand all these formations, geographers organise them into groups based on characteristics that are similar. These different groups are referred to as landscapes. There are many different types of natural landscapes on Earth, including mountain, coastal, river and desert landscapes. Landscapes created by people are called human landscapes.

Source 1 This image shows Kirkjufell Mountain in Iceland. This type of landform is a nunatak, which is a mountain that protrudes through a glacier or ice sheet. Iceland is a land of fire and ice. Straddling the boundary between two giant tectonic plates that drift in opposite directions, it is being slowly torn apart. This has produced a series of volcanic mountains that regularly erupt, creating new land. In turn, this new land is slowly worn away by other forces of nature: waves, rivers, rain and moving ice. This is the story of all landscapes: there are some forces that build them up and others that wear them down.

2A

What are landscapes and landforms?

2.1 The Earth's landscapes

In this topic, you will:

» identify and describe different types of landscapes around the world.

landscape
a section of the Earth's surface made up of a variety of geographical features (known as landforms) that define and characterise it; landscapes can be natural (e.g. coastal and mountain landscapes) or human (e.g. neighbourhoods and cities)

tectonic plates
immense, slowly moving pieces that make up the Earth's surface (or crust)

mountain ranges
series of mountains or hills ranged in lines and connected by high ground

Explore it!
A virtual field trip to the Himalayas

A **landscape** is a part of the Earth's surface. It consists of a variety of geographical features that are distinct from other parts of the Earth. Each landscape has been created by a mix of factors, including natural processes and human activities. Landscapes are divided into two main categories – natural and human. Natural landscapes (for example, mountains and deserts) are mainly unaffected by human activity whereas human landscapes (for example, cities and farms) have been created and modified by people. Some different types of landscapes are described below.

Mountain landscapes

Mountain landscapes are formed by movement of the **tectonic plates** that make up the Earth's surface. As they move, they push against each other and force land upwards, forming **mountain ranges**. These mountain ranges are made up of ridges and valleys. In some places, the hot rock below the plates is forced upwards, creating volcanic mountains. Their eruptions create distinct landscapes, such as much of Iceland (see Source 1 on the previous page). We will explore mountain landscapes in more detail in Chapter 3.

Source 1 The Himalayas are the world's highest mountain range. They were formed by the collision of two of the Earth's tectonic plates. The range includes Mount Everest, the highest mountain on Earth, which rises almost 9 kilometres above sea level.

Source 2 The sea cliffs of Ireland are under constant attack from storms in the Irish Sea, which produce large waves.

Coastal landscapes

The coast is where a land mass meets the sea. Coastal landscapes are constantly shaped by the natural forces of the wind and waves. These geographical forces erode (wear away) or construct (build up) the natural environment, constantly changing its shape. Features of coastal landscapes include beaches, dunes, bays, cliffs, platforms, spits and lagoons. We will explore coastal landscapes in more detail in Chapter 4.

River landscapes

Rivers shape the land over which they flow. Fast-flowing rivers wear away rocks and soil, and carry them downstream. In slower-moving parts of the river, these rocks and soil are deposited and create distinctive **landforms**. River landscapes (or riverscapes) are often excellent for agricultural uses such as farming because the land is rich and fertile. They are a valuable resource for growing food, and often support large human populations in cities and towns.

Source 3 The Li River in China flows through a distinctive landscape of limestone formations. The river supports many farming communities.

Desert landscapes

A desert is an area of land that receives no more than 250 millimetres of rain per year. Deserts cover about one-third of the Earth's surface and contain some of the most uninhabitable regions on the planet. There are two types of deserts – hot deserts and cold deserts. Hot deserts are located along the Tropics of Cancer and Capricorn (the latitude lines to the north and south of the Equator) and are shaped by heat and wind. Cold deserts are located closer to the poles and are shaped by the movement of ice in large **glaciers** and **ice sheets**.

landform
a natural geographic feature or shape that appears on the Earth's surface (e.g. dune, hill, valley, beach or cave)

glacier
a river of ice in mountain and polar landscapes

ice sheet
a layer of ice covering a large area of land for a long period of time

Source 4 Uluru is located in the Central Australian Desert. Its distinctive shape is the result of different rates of **erosion** on hard and soft rocks.

erosion
the wearing away of the Earth's surface by water, wind and ice

2.1 CHECK YOUR LEARNING

Review and understand

1 In your own words, **define** 'landscape'.
2 **Identify** the type of landscape that is typically found along the Tropics of Cancer and Capricorn.

Apply and analyse

3 For each of the four landscapes pictured, **describe** the forces responsible for creating or changing them.
4 Researchers have recently added almost a metre to the official height of Mount Everest. **Explain** how it is possible for a mountain to grow taller.
5 **Distinguish between** a natural and human landscape. Remember, when you distinguish between two things you should talk about how they are different.

Evaluate and create

6 **Research** one landscape that interests you. Your chosen landscape might be on the World Heritage List (such as the Uluru–Kata Tjuta National Park) or in your local area. Find out what makes this landscape unique, and provide information about how it is used. Present your research in the form of a brochure, poster or webpage.

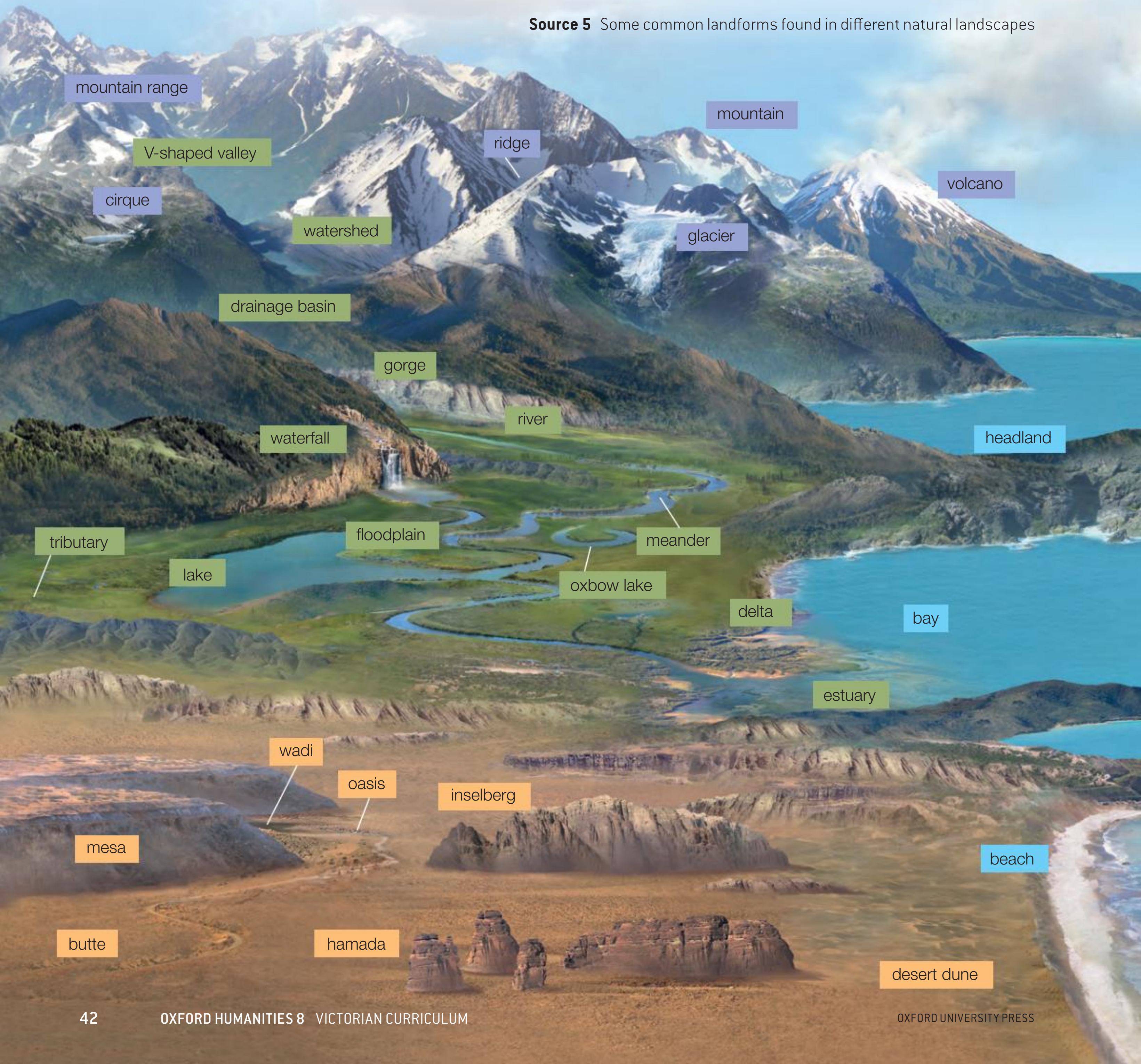
2.2 The Earth's landforms

In this topic, you will:

» identify and describe the features of different landforms on Earth.

You have already discovered that the Earth has a great range of natural landscapes, including mountain, coastal, river and desert landscapes. Within these landscapes, distinctive landform features can be found. A landform is a specific shape or physical feature of the Earth's surface that has been produced by a geomorphic process. These are natural processes that shape the Earth's surface. Some of these processes, such as volcanic eruptions and plate movements, build up the Earth's surface. Others wear it away. Some common landforms are shown in Source 5.

Source 5 Some common landforms found in different natural landscapes



MOUNTAIN LANDSCAPES

Cirque
Bowl-shaped hollow at the head of a valley or on a mountainside, formed by glacial erosion

Glacier
Large frozen river of ice that slowly moves down a valley in response to gravity

Mountain
Steep-sided, lone peak rising over 600 metres above the surrounding land

Mountain range
Chain of connected mountains

Ridge
Long, narrow elevation of land

Volcano
Opening in the Earth's crust where molten rock, ash and gas can escape

DESERT LANDSCAPES

Butte
Flat-topped hill

Desert dune
Wind-blown particle formation

Hamada
Area covered in boulders and large stones

Inselberg
Isolated, steep-sided hill of resistant rock on a plain

Mesa
Flat-topped, steep-sided plateau

Oasis
Desert area with a water supply provided by groundwater

Wadi
Dry watercourse in a narrow valley that divides a plateau

RIVER LANDSCAPES

Delta
Fan-shaped, low-lying area of deposits at the mouth of a river

Drainage basin
Area providing water to a river system

Estuary
River mouth broadening into the sea

Floodplain
Flat area over which water spreads in times of flood

Gorge
Deep, narrow, steep-sided valley

Lake
Large body of water surrounded by land

Meander
Bend in a river

Oxbow lake
Crescent-shaped lake on a river floodplain

River
Natural waterway that takes water downhill by gravity to the sea

Tributary
Small river that joins a larger river

V-shaped valley
Narrow, steep-sided valley carved out by the upper reaches of a river

Waterfall
River-water spill over resistant rock

Watershed
High point from which water flows into a drainage basin

COASTAL LANDSCAPES

Archipelago
Group or chain of islands

Atoll
Ring-shaped coral reef or a string of closely spaced small coral islands encircling a shallow lagoon

Bay
Broad, curved indentation in the coastline

Beach
Deposited rock particles – such as sand, gravel or pebbles – along the coastline

Cliff
Steep rock face formed by the action of the waves

Coral reef
Underwater ridge formed by the growth and deposit of coral

Headland
Narrow, high land jutting out from a coastal cliff into the sea

Island
Area of land surrounded by water

Isthmus
Narrow strip of land or sand that connects an island to the mainland

Spit
Narrow strip of sand protruding into the sea

Stack
Tall pillar of rock formed by wave action eroding a cliff

Quiz me!
A quick quiz on the Earth's landforms

2.2 CHECK YOUR LEARNING

Review and understand

1 **Identify** three landforms that you could find in desert landscapes.

2 **Identify** the landscape where you could find a delta, an estuary and a gorge.

Apply and analyse

3 a **Examine** Source 1 on page 40. What type of landscape is shown in this source?

b **Identify** three landforms you can see in this source.

Evaluate and create

4 **Create** a travel brochure for the Victorian Government tourism agency promoting one Victorian landform. Your brochure should point out the special features of the landform that would encourage people to visit.

2.3 How we value landscapes and landforms

In this topic, you will:

- compare the different ways that people value landscapes and landforms, including spiritually, culturally and aesthetically.

Landscapes and landforms around the world are valued by many different people for many different reasons. In general, geographers divide the ways in which people value landforms and landscapes into four categories:

- spiritual value
- cultural value
- aesthetic value
- economic value.

Spiritual value

For Aboriginal peoples, the spiritual value of land is expressed through the concept of **Country**. They believe that the stories of their **Dreaming** bind them to the land. They also believe that their ancestors live on through the land, and ensure their continued connection with it.

As a result, Australian landscapes contain many sacred sites of spiritual importance for Aboriginal peoples. For example, the Adnyamathanha people believe that the walls of Wilpena Pound (Source 6) were formed by two large serpents.

Source 6 Spiritual value: Wilpena Pound is a landform in the Flinders Ranges mountain landscape of South Australia. The traditional landowners, the Adnyamathanha people, regard it as an important part of their Creation Stories. By contrast, many people visit this landform as a tourist site.

Country
for Aboriginal peoples, Country is both a place of belonging and a way of believing; Country includes all living things and embraces creation stories

Dreaming
the belief system central to all Aboriginal cultures; the Dreaming also provides a moral code and guidance on interacting with Country; the Dreaming is not fixed in time – it is in the past, present and future

Cultural value

Cultural value is linked to the importance of landforms and landscapes as expressed by people through creative means, such as literature, art and films. Australia's landscapes and landforms have shaped Australian culture and identity. Many films, such as *Tracks*, were filmed in the Flinders Ranges. In *Tracks*, as in many Australian films, the landscape has a profound impact on the characters.

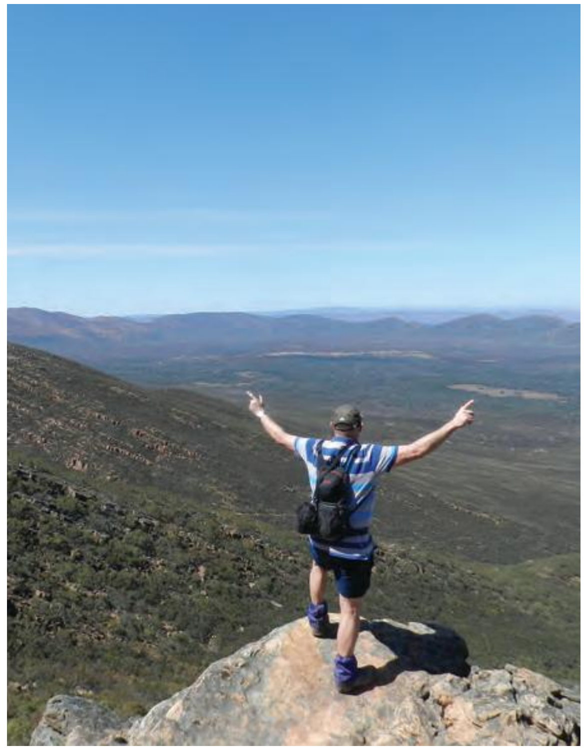
Aboriginal peoples express the importance of the land to them through Dreaming stories, song and dance, and art. Aboriginal art often relates to important landscapes and landforms.

Source 7 Cultural value: An image from the 2013 film *Tracks*, which tells the true story of a young woman who trekked across the Australian outback with camels

Aesthetic value

The aesthetic value of a landscape is closely linked to its beauty and uniqueness, and is always subjective (personal). People are drawn to places for many reasons. Being surrounded by the beauty of the landscape may give someone a sense of freedom and well-being.

Hundreds of thousands of tourists visit Wilpena Pound each year and many climb the highest nearby mountain, St Mary Peak (Ngarri Mudlanha).



Source 8 Aesthetic value: A visitor enjoys the view across Wilpena Pound, from near the top of St Mary Peak (Ngarri Mudlanha).

Economic value

Economic value is a measurement of how financially important landscapes and landforms are. Income can be generated from landscapes in many ways. The mining industry, for example, attaches economic value to landscapes that contain sought-after metals and minerals, such as coal and gold.

Tourism is an important industry in the Flinders Ranges. More than 700 000 people visit the region each year, contributing $450 million to the local economy. Businesses such as tour operators, hotel owners and service stations all benefit from this income.

Competing values

The same landscape can be valued by different people for different reasons. To a mining corporation, the most important thing might be the economic value of a landscape; while to an Aboriginal community, it may the spiritual value. Then again, an artist might appreciate the aesthetic value of a landform. All these values are important to consider when deciding on how a landscape is best used.

Quiz me!
A quick quiz on how we value landscapes and landforms

2.3 CHECK YOUR LEARNING

Review and understand

1 What type of landscape is the Flinders Ranges?

2 Using Source 5 on pages 42 to 43 as a guide, **identify** the landform in Source 7.

Apply and analyse

3 **Distinguish between** economic value and cultural value. Remember, when you distinguish between two things you must talk about how they are different.

4 **Rank** the values of landscapes and landforms in order of importance to you. **Justify** (give reasons for) your top choice.

5 There is a sign near the top of St Mary Peak (Ngarri Mudlanha) at Wilpena Pound from the Adnyamathanha people requesting that visitors do not climb to the top.

a Why do you think this request has been made?

b Many visitors ignore the sign and climb to the top. **Explain** how this is an example of competing values.

Evaluate and create

6 Research a book, poem, movie or website that has cultural value for Australia, or a country or place that you feel connected to. **Create** a poster to present your findings. Include the title of the work, its creator, a blurb about it and an image to represent it. Most importantly, provide three reasons why you feel it has particular cultural significance.

2.4 Spiritual value in Australia

In this topic, you will:

» explore the significance of landforms and landscapes to Aboriginal peoples.

For Aboriginal peoples, land is much more than soil, rocks and ridges. Each person belongs to a piece of land in the same way each of us belongs to a family. As such, Aboriginal peoples care for the land in a way that is known as 'Caring for Country'. In doing so, Aboriginal peoples look after the stories, places, resources and culture of their land.

CASE STUDY

The Glasshouse Mountains

The Glasshouse Mountains in south-east Queensland have been home to the Jinibara, Gubbi Gubbi and Kabi Kabi peoples for thousands of years.

We know this from their oral history and songs. We also know this from physical evidence, such as axe-grinding grooves and rock art sites.

oral history
a mix of oral traditions and written history – allowing people to share their memories and ensure their stories are never forgotten

The Gubbi Gubbi Creation story of the Glasshouse Mountains

Mount Tibrogargan (the father) and Mount Beerwah (the mother) had many children, the eldest of whom was Mount Coonowrin. One day, Tibrogargan saw a great wave approaching from the sea. He called on Coonowrin to help Beerwah, who was pregnant at the time.

In the meantime, Tibrogargan gathered up his other children and ran towards higher land. Tibrogargan looked back to see that Coonowrin was not helping his mother, but running off alone. He chased his son and hit him in a great rage.

When the floods had dried up, Coonowrin begged Tibrogargan for forgiveness, but instead Tibrogargan wept in shame. By crying, Tibrogargan created the streams that still run in the region today. He asked Coonowrin why he had not helped his mother. Not knowing his mother was pregnant, Coonowrin replied that Beerwah was the biggest of all of them and could look after herself. As a result, Tibrogargan turned his back and vowed never to look at his son again.

Today, Tibrogargan gazes out to sea, while Coonowrin hangs his head and cries, his tears running off to the sea. His mother Beerwah is still pregnant, as it takes a long time to birth a mountain.

Spiritual significance today

The Glasshouse Mountains continue to be a place of strong spiritual value for the local Aboriginal peoples. As Mount Beerwah is a mother mountain, she holds particular significance.

Jinibara Elder Ken Murphy tells us why Beerwah needs to be respected by the tourists who visit the mountain: 'It is a sacred site. It's where the birthing places

Key skill worksheet
Asking questions & conducting research: Ethically researching Aboriginal and Torres Strait Islander geography

Source 9 The Glasshouse Mountains – the large broad mountain on the left is Tibrogargan (the father), to the right of centre is the pyramid-shaped Beerwah (the mother), and Coonowrin (the son) is the tall, narrow mountain on the right.

were, that's the main thing, not for people to climb and take videos up.'

Elders have asked that climbing Beerwah be banned out of respect for its spiritual significance. The Queensland Government, however, has no plans to do so. In fact, it has recently upgraded walking tracks in the area.

Meanings of place

It is important to remember that not all people think about place in the same way. Geographers see mountains as places to be studied so that they can learn more about how they are formed.

For many Aboriginal peoples, however, mountains are much more than rocks to be studied. They believe that the mountains were alive in the time before humans walked the Earth, and that the shapes and locations of mountains can tell us about the ancient events that have led to us being here today. Learning these stories helps geographers to appreciate that we do not all see the same place in the same way. It also prompts them to ask questions about which perspective should be considered as most important, and why.

For more information on this key concept, refer to page 6 of 'The geography toolkit'.

Source 10 Members of the Gubbi Gubbi clan lead a group of Aboriginal and Torres Strait Islander rugby league players on a cultural retreat in the Glasshouse Mountains.

KEY CONCEPT
Place

I used to think, now I think

Reflect on the spiritual value of the natural landscape in Sources 9 and 10, and complete the following sentences.

- I used to think …
- Now I think …

What has changed in your understanding?

2.4 CHECK YOUR LEARNING

Review and understand

1 **Identify** three pieces of evidence that tell us that the Glasshouse Mountains have been inhabited for tens of thousands of years.

2 What is oral history?

Apply and analyse

3 **Explain** how the Glasshouse Mountains case study shows us the different ways in which people value landscapes.

4 Indigenous peoples in many countries have stories to explain the creation of landscapes. Why do you think this is the case?

Evaluate and create

5 'Mount Beerwah should be open to anyone who wants to climb it.' **To what extent** (how much) do you agree with this statement, and why?

6 In October 2019, Uluru was permanently closed to climbers. **Research** why this decision was made. What were the differing points of view about this decision?

2.5 Human impacts on landscapes

In this topic, you will:

» explore the causes and effects of landscape degradation.

Humans have been changing landscapes for thousands of years. We clear forests and change the shape of the land to graze animals and grow crops. We move mountains and divert rivers to build towns. We even create new land from the sea in coastal areas. In fact, humans have changed the Earth so much that today very few truly natural landscapes remain.

Landscape degradation

landscape degradation
a process that occurs when the productivity of land is lost

Landscape degradation affects 33 per cent of the Earth's land surface. It reduces the quality of the land and its capacity to produce food. Human activities are the main cause of landscape degradation. Examples of this include overgrazing, crop growing without resting the fields, deforestation, collection of wood for fuel, and mining.

Mining and landscape degradation

Through the ages, people have extracted minerals from rocks (ores) to use for different purposes. The discovery of ores, and people's ability to extract the metals within them, has been crucial for the technological development of society. Today our lifestyle depends on the use of a large range of minerals; for example, the batteries in our phones and laptops are made from lithium.

Minerals come from the rock in the Earth's crust. If the rock containing the mineral is close to the Earth's surface, it can be dug up by open-cut mining (see Source 11). Mining and the processes used to extract minerals from the ore damage our environment. Even where mining occurs underground, crushed rock is dumped in piles around the mine after the valuable minerals have been extracted from it.

Source 11 This open-cut coal mine in the Hunter Valley, New South Wales, illustrates how mining and quarrying dramatically change natural landscapes. First, the natural vegetation has been cleared; then the top layer of soil and rock has been removed so the minerals can be accessed, leaving a huge open-air pit. Sometimes, the mining process may also release dangerous chemicals into the environment.

Video
Industry erosion and disappearing islands in the Bayou

The shrinking wilderness

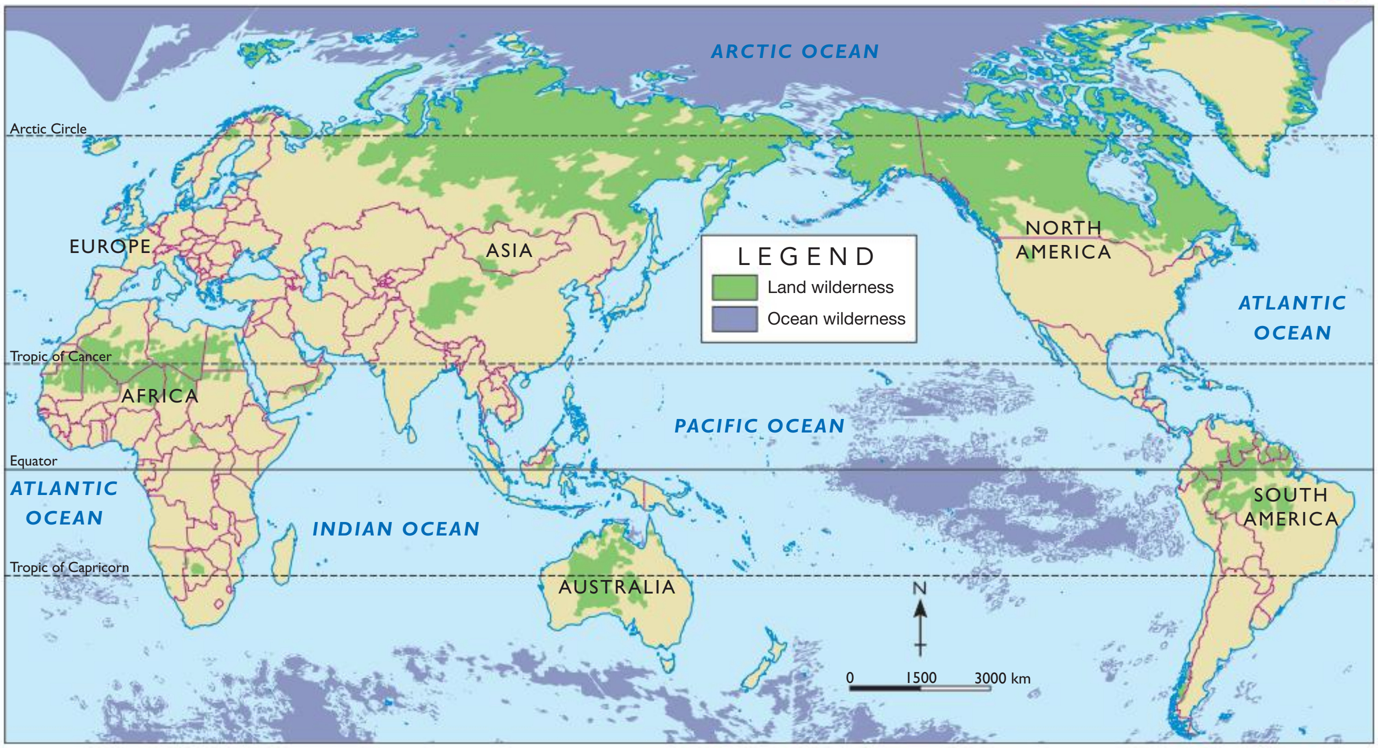
Recent studies have shown that there are very few intact areas of wilderness left on Earth. More than three-quarters of the Earth's **ecosystems** have been changed by human activities. While this topic has so far focused on changes on land, the world's oceans are also undergoing change.

Climate change is responsible for much of this change as it raises the temperature of the water and makes the ocean slightly more acidic. This can have devastating impacts on fragile ecosystems, such as coral reefs. The world's largest reef, Australia's Great Barrier Reef, for example, has lost half of its corals since 1995.

ecosystem
a community of organisms that live together and interact with each other in a specific environment

climate change
the long-term change in the average weather patterns of Earth

WORLD: THE EARTH'S REMAINING WILDERNESS



Source: Oxford University Press/AFP

Source 12 Only 23 per cent of the land and 13 per cent of the oceans is considered wilderness today.

2.5 CHECK YOUR LEARNING

Review and understand

1 How does mining contribute to landscape degradation?

2 **Describe** the changes that have been made to the landscape in Source 11.

Apply and analyse

3 How does climate change degrade the ocean?

4 Examine Source 12.

a **Identify** and **describe** the purpose of this type of map (see page 23 of 'The geography toolkit').

b Use the world map at the back of the book to **list** the countries where the Earth's wilderness is located.

c **Describe** the distribution of wilderness in Australia.

Evaluate and create

5 Which of the sources in this topic would you use to convince a friend that the Earth's landscapes are under threat? **Justify** (give reasons for) your answer.

6 Which of the threats described in this topic do you consider the most difficult to overcome? **Discuss** this as a class.

2A RICH TASK

Tourism in Australia

Every local and international tourists visit Australia's unique landscapes and landforms. These include the Great Ocean Road in Victoria, Sydney Harbour in New South Wales, Uluru in Central Australia and the Bungle Bungle Range in Western Australia.

Quizlet
Revise the key terms you have learnt so far.

Source 13 Reefworld at Hardy Reef, where tourists can snorkel, dive or even stay the night

These places not only have cultural, spiritual and aesthetic value, but they also have economic value to Australia. This is because of the money brought in by tourism. Each year, tourism generates around $60 billion for the Australian economy. Tourism provides jobs for many people, such as travel agents and tour guides. When tourists visit sites, they also spend money on food and souvenirs, as well as public transport and accommodation.

One of Australia's most famous landscapes is the Great Barrier Reef. It is the world's largest reef system, made up of 2000 individual reefs and islands, and stretching for 2300 kilometres along the Queensland coast. It is estimated that about 2 million people visit the reef each year, although it is difficult to know the exact number. Most of these visitors are Australians who stay at least one night in towns and cities nearby, such as Cairns. Visitors generate around $6 billion a year in the region. The reef is also responsible for more than 60 000 jobs in many different industries.

KEY SKILL
Collecting & representing data

Reading multiple-line graphs

Line graphs are used to show changes in data so that we can readily identify trends. In order to compare trends in different sets of data, geographers use multiple-line graphs (that is, line graphs with more than two lines) like the one shown in Source 14.

To interpret these types of graphs, follow the steps below.

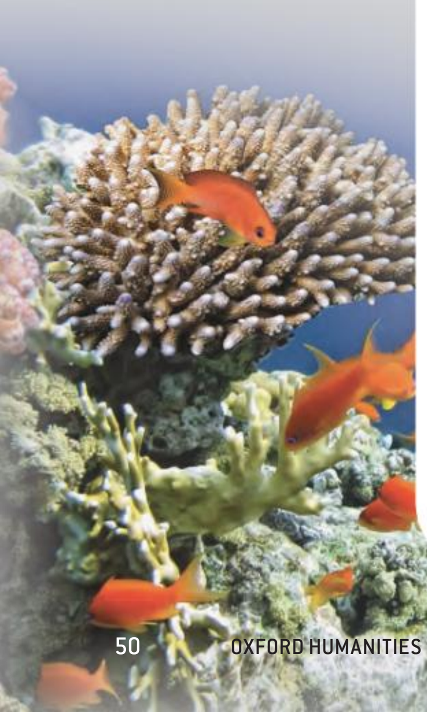
Step 1 Read the title carefully so that you understand what type of data is being shown on the graph.

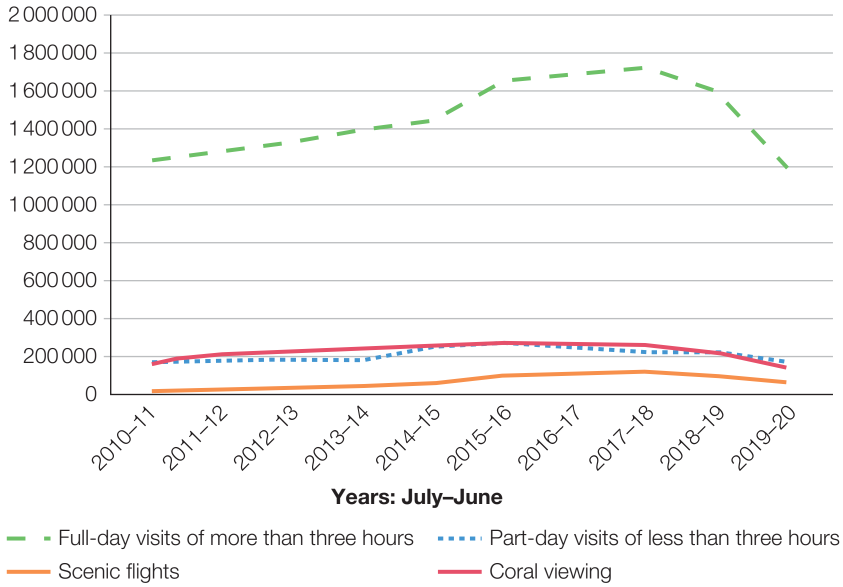
Step 2 Look closely at each scale. In Source 14, you will notice that the vertical axis shows the numbers of visitors of each type, while the horizontal axis shows the years from 2010 to 2020.

Step 3 Look closely at the legend and colours so that you understand the different sets of data being graphed.

Step 4 Look for major patterns. In this graph, there has been an obvious decline in all types of tourism to the Great Barrier Reef in 2019–20.

For more information on this key skill, refer to page 28 of 'The geography toolkit'.





Source: Statistics from Great Barrier Reef Marine Park Authority, Australian Government

Source 14 Visitation data, Great Barrier Reef, 2010–20

Month	Number of visitors in 2019	Number of visitors in 2020
January	731 100	766 600
February	927 200	685 400
March	836 000	331 900
April	700 400	0
May	668 300	0

Source: Data provided by Budget Direct Travel Insurance

Source 15 The number of overseas tourists in Australia from January to May in 2019 and 2020

Practise the skill

1 Identify the type of graph used in Source 14 and **describe** its purpose.

2 **Describe** the trend over time in full-day visits as shown in Source 14.

3 **Compare** the trends in the number of visitors to the landscape who listed 'coral viewing' as their main activity to the number of visitors who undertook a scenic flight. Remember, when you compare two things you must talk about how they are similar and different.

4 Give reasons for the decline in tourist numbers in 2019–20. What events were happening at the time that might have discouraged tourism?

5 Imagine that a friend visiting from overseas has asked your opinion on how they should see the Great Barrier Reef. Although you might not have been to the reef yourself, you can use the data from Source 14 to give recommendations. **Determine** (decide) how they should visit the reef and explain how you found your answer.

Extend your understanding

1 Using the data provided in Source 15, **create** a multiple-line graph of your own.
   a Plot the number of tourists on the vertical axis and the months of the year on the horizontal axis.
   b Use different-coloured lines to represent the different sets of data.
   c Give your graph a title and legend.

2 Now that you have created your graph, answer the following questions to interpret the data:
   a **Identify** the number of visitors to Australia in January 2019.
   b **Calculate** the difference between the number of visitors to Australia in March 2019 and the number of visitors in the same month in 2020.
   c In a paragraph (around 200 words), **discuss** the impact of the COVID-19 pandemic on tourism in Australia. In your paragraph, talk about one economic impact, one social impact and one environmental impact that the pandemic has had on tourism in Australia. These can be either positive or negative impacts. Remember, the best discussions always include more than one point of view.

2 CHAPTER REVIEW

Review questions

2A What are landscapes and landforms?

1 **Outline** the difference between a landscape and a landform. (2 marks)

2 Choose a natural landscape and **describe** one human threat to this landscape. (2 marks)

3 Many landscapes are under threat in different places around the world. **Propose** (put forward) one strategy that humans could use to change their behaviour in order to protect the Earth in the future. (6 marks)

(Total: 10 marks)

Source 16 Many of the world's rivers have been greatly changed by humans. In Tasmania, the Gordon River (shown here) has been dammed to provide electricity for towns and cities. In other places, dams provide water to irrigate farms and supply people in towns with a reliable source of water.

Review activity

Examine the photos and answer the questions.

Geographical photos

Geographical photos are taken at a specific angle to show the geography of a particular landscape. There are many different types of geographical photos, including vertical (bird's-eye) and oblique photos.

1 For Landscapes A, B and C, identify two landforms in each image. (2 marks)

2 **Identify** the type of landscapes shown in Landscapes A–D. (4 marks)

3 **Compare** Landscape A with Landscape C. How are they similar and how are they different? (4 marks)

4 Look closely at Landscape D.

  a **Identify** two ways that human activities have changed this landscape. (2 marks)

  b **Explain** why these changes have taken place. (3 marks)

5 Landscape degradation is one of the most serious threats to our landscape.
Suggest two types of changes that would happen to Landscape D if all the forest was cleared.
What type of impact do you think this would have on the natural environment? (5 marks)

(Total: 20 marks)

Source 17 Landscape A

Source 18 Landscape B

Source 19 Landscape C

Source 20 Landscape D

Check your Student obook pro for these digital resources and more:

Student book questions
Chapter 2

Key skill worksheet
Communicating and reflecting: Chapter 2

Quizlet
Play a game of Quizlet on Introduction to landscapes and landforms.

Chapter review quiz
Chapter 2

CHAPTER 3

Mountain landscapes

A mountain is an elevated landform that rises above the surrounding landscape. Mountain landscapes appear on every continent on Earth and are created by the movement of the Earth's tectonic plates. Human activities – such as mining, tourism, farming and the damming of rivers – have changed mountain landscapes in many places. In response to these changes, some communities have developed ways to protect these landscapes.

Mountains can be harsh, dangerous and unforgiving landscapes. Weather conditions can change quickly, bringing flash flooding and snow, and the risk of avalanches and landslides. In some places, volcanic eruptions are an ever-present threat.

In this chapter we will explore mountain landscapes and the forces that shape them, both natural and human.

Source 1 Indonesia is one of the most volcanic countries on Earth. This is because of its location on a boundary between several of the Earth's tectonic plates. Nearly 200 million Indonesians live within 100 kilometres of a volcano. The rich volcanic soils have allowed them to grow plentiful food, but they live in the knowledge that an eruption could occur at any time.

3A
How are mountain landscapes formed?

3B
How are mountain landscapes used and managed?

3C
Are mountain landscapes hazardous places?

3.1 Tectonic plates

In this topic, you will:

» develop an understanding of the Earth's tectonic plate boundaries, and how they can impact mountain landscapes around the world.

magma
the hot, liquid (molten) rock beneath the surface of the Earth

plate boundaries
the edges where two tectonic plates meet; most geologic activities take place here, including volcanoes and earthquakes

converge
come together from different directions

diverge
move apart in different directions

subduction
when two tectonic plates meet, and one is forced under the other

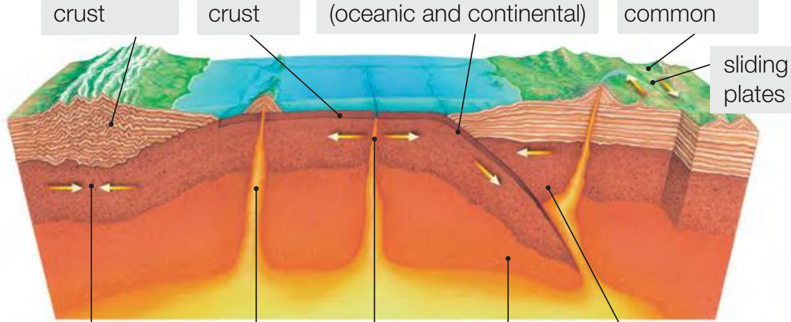
transform boundary
when two tectonic plates scrape sideways past each other, often causing an earthquake

The outer layer of the Earth's surface (known as the crust) is broken into large pieces called tectonic plates. These plates are around 100 kilometres thick and fit together like enormous pieces of a jigsaw puzzle. Currents in the red-hot molten material (**magma**) under these tectonic plates cause them to move about. The places where tectonic plates meet are known as **plate boundaries**. Here, plates will do one of three things: collide (**converge**), separate (**diverge**) or slide past each other.

When plates converge, the edge of the more dense plate is usually forced below the other in a process called **subduction**. Plates beneath oceans are denser than plates beneath land, so they tend to be pushed downwards in the collision. This creates a line of mountains along the crumpled edge. Volcanoes can also be created in this way, as hot magma rises through cracks in the crust created in the plate collision (see Source 10 on page 60).

When plates diverge, magma rises to fill the space. This can also create a line of mountains, as magma spreads upwards into a ridge.

Where plates slide past each other, this is known as a **transform boundary**. By sliding past, these plates do not create any new land. However, they can scrape against each other and, in doing so, often cause earthquakes.



Source 1 Tectonic plate movement

3.1 CHECK YOUR LEARNING

Remember and understand

1 In your own words, summarise three ways that the Earth's tectonic plates move.

Apply and analyse

2 **Explain** why most of the world's mountains are located on converging plate boundaries.

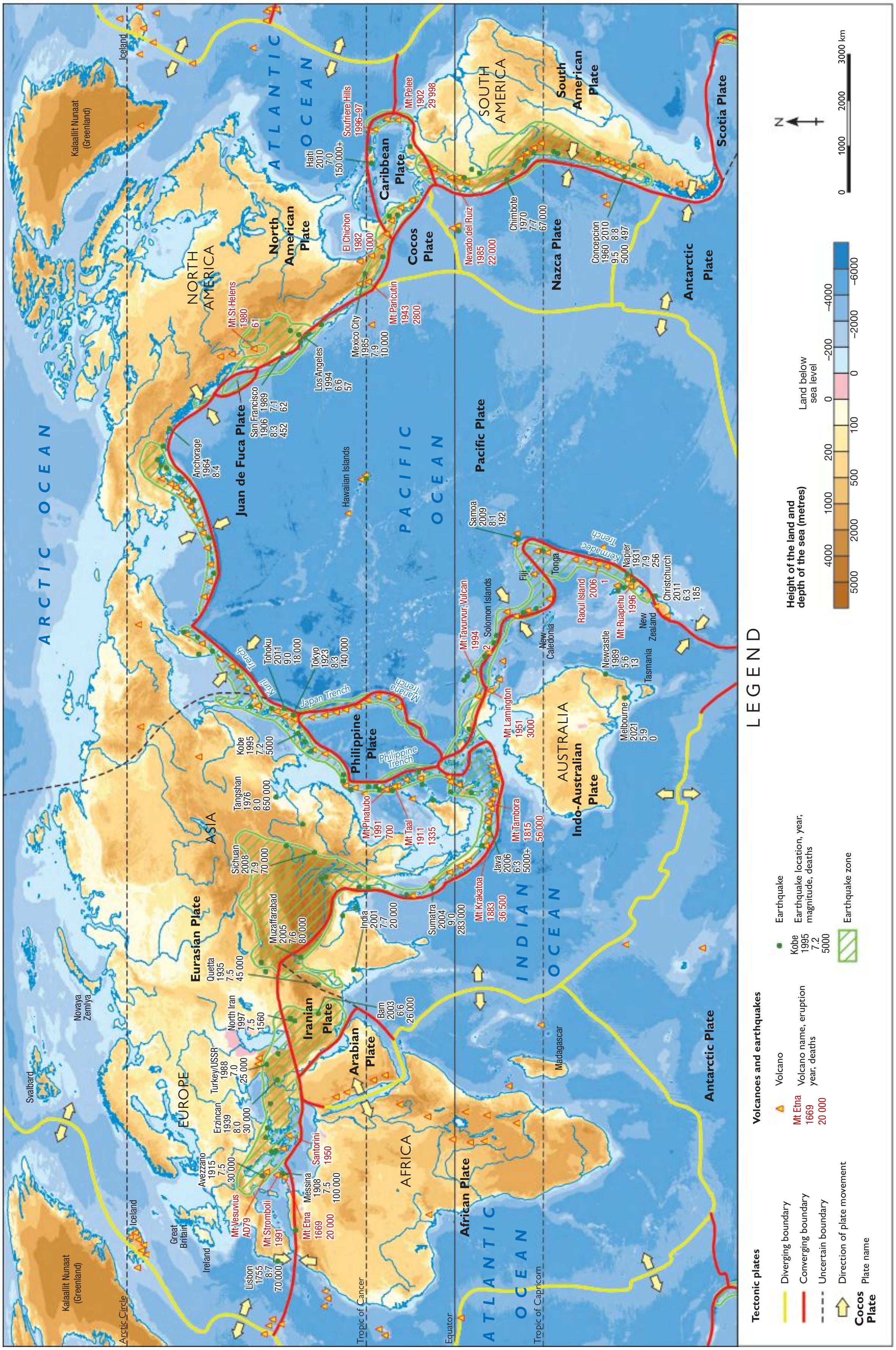
3 Examine Source 2.

a **Identify** the links (also known as the 'spatial association') you can see between plate boundaries and mountain ranges.

b Australia is the flattest continent on Earth. Use evidence from the map to **explain** why this is the case.

Evaluate and create

4 **Research** tectonic plates to explain the difference between 'continental' and 'oceanic' plates.



Source 2 World: Major tectonic plates

Source: Oxford University Press

Interactive
World: major tectonic plates

3.2 How mountains are formed

In this topic, you will:

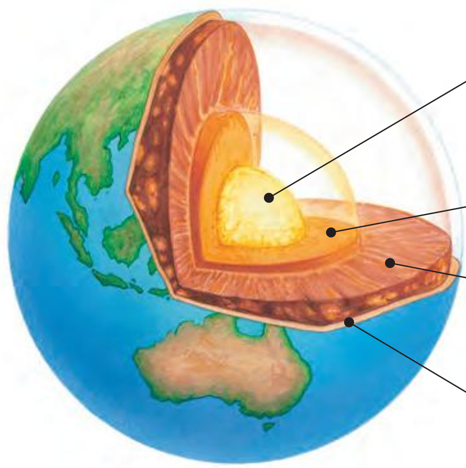
» explore the processes that produce mountains, including fold mountains, fault-block mountains and volcanic mountains.

Worksheet Mountain facts

Mountains are formed where the surface of the Earth has been pushed upwards. Tremendous forces inside the Earth can crumple the surface into long mountain chains, such as the Himalayas in Tibet; or punch through the surface to create volcanoes, such as Mauna Kea on the island of Hawaii. To understand how this happens, you need to know about the world beneath your feet.

You may be used to thinking of the Earth as a solid ball, like a giant shot-put, but this is far from the reality. The Earth is more like a giant peach, with a thin skin and a core at the centre surrounded by soft flesh. Scientists believe that the Earth is made up of four layers (see Source 3).

mantle
the soft layer of hot rock between the crust and the core of the Earth



Source 3 The Earth's layers

CASE STUDY

Victoria's 2021 earthquake

On Wednesday, 22 September 2021, Victoria experienced a magnitude-5.9 earthquake. Shocks rippled through Melbourne and regional Victoria, and reached as far as Sydney, Canberra, Adelaide and Launceston. There were no fatalities, but several buildings in the Mansfield area and in Melbourne were damaged. Scientists believe it may have been the largest recorded earthquake in eastern Australia.

Dr Trevor Allen, a seismologist with Geoscience Australia, uses the metaphor of a pavlova to explain why we have earthquakes here in Australia:

> Imagine that a tectonic plate is a pavlova – with a thin brittle crust [and a] mostly solid meringue mantle. The Australian continent would sit in the middle of our pavlova. If you put your hands on the edge of the pavlova and start to squeeze, the crust around your hands will be the first to break, like those earthquakes at the boundaries of tectonic plates. But if you continue to squeeze, eventually strain builds up in the centre of the crust, and cracks will begin to appear. This is similar to how we get earthquakes in Australia.

It is very unlikely Australia would ever experience a magnitude-8 or magnitude-9 earthquake, because the forces responsible for them only occur at the plate boundaries.

Types of mountains

Mountains are classified according to how they were formed. There are three main types of mountains:

1 fold mountains
2 fault-block mountains
3 volcanic mountains.

Source 4 The folded rocks of the Himalayas are clearly visible in this view of the mountains in Tibet.

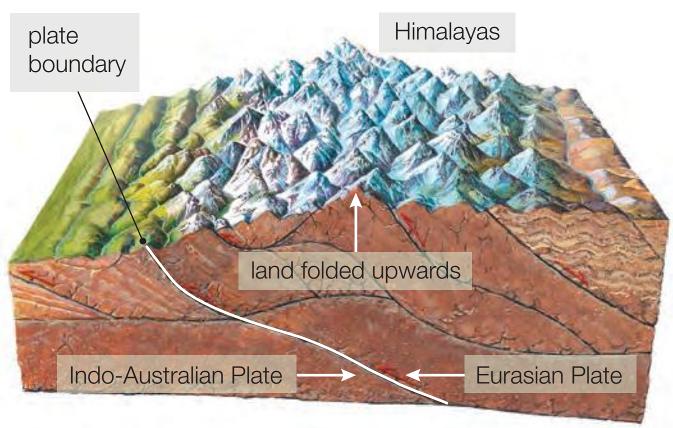
Source 5 Steens Mountain in the state of Oregon, United States, is an example of a fault-block mountain range.

Source 6 Mauna Kea on the island of Hawaii is an example of a shield volcano.

Fold mountains

Fold mountains are created by upward pressure where two tectonic plates collide. As the plates converge, layers of rock are buckled and pushed upwards, creating fold mountains (see Source 7).

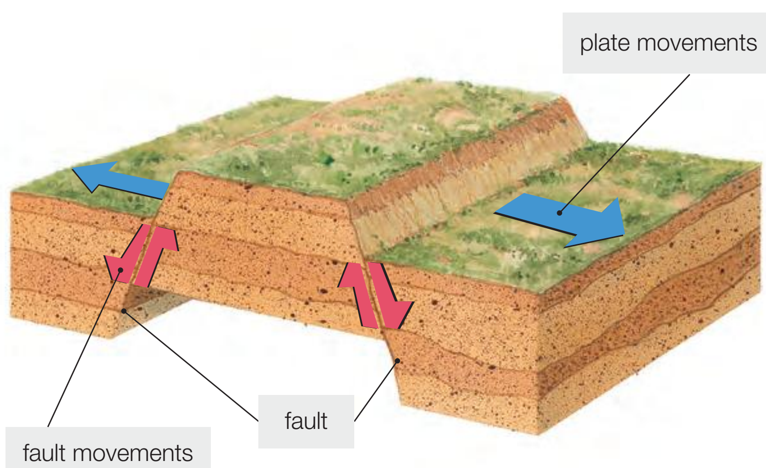
The world's largest fold mountains are the Himalayas, which separate southern Asia from central Asia, and include the world's highest mountain, Mount Everest. The Himalayas have been formed by the collision between the Indo-Australian Plate and the Eurasian Plate over the last 55 million years. Currents within the mantle are moving the Indo-Australian Plate northwards, and its front edge is bulldozing into the Eurasian Plate, folding the edges of both plates upwards.



Source 7 The collision of tectonic plates caused the formation of the Himalayas. This diagram shows us how fold mountains are created.

Fault-block mountains

Fault-block mountains are created when cracks in the Earth's crust – known as faults – force blocks of land upwards (see Source 8). Unlike fold mountains, which tend to have gently sloping sides, fault-block mountains usually have steep sides and flat summits. Some of the best-known examples are the Swiss Alps in Europe, the Grampians in Victoria and the Teton Range in the United States.



Source 8 Creation of a fault-block mountain

hot spots
points where there is volcanic activity, but the hot spots are not on a plate boundary

ash
very fine rock and mineral particles, less than 2 millimetres in diameter

lava
the molten material that flows from a volcano

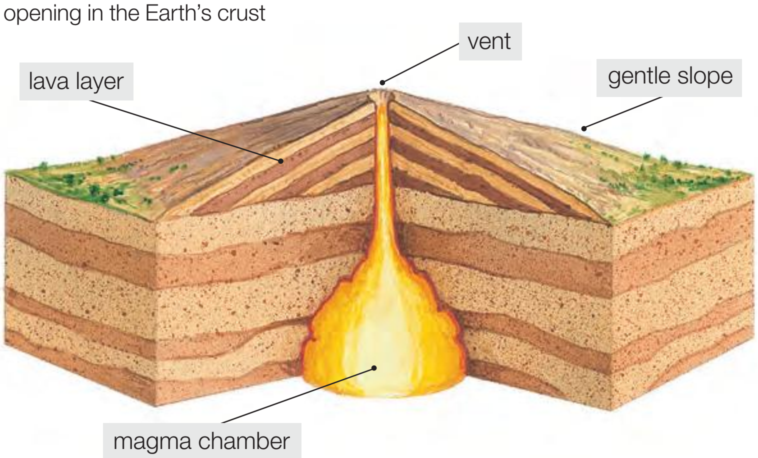
shield volcano
a volcano characterised by gentle eruptions that emit runny lava over a wide area

volcanic cone
a triangle-shaped mountain formed as material from volcanic eruptions piles up around the volcanic vent or opening in the Earth's crust

Volcanic mountains

There are two ways volcanic mountains can form. The first is through the process of subduction, where plates collide, and the more dense plate is forced downwards into the mantle (see Source 1 on page 56). This is how most of the world's volcanoes are formed and explains why most volcanoes are located on or near plate boundaries. Volcanoes also form in **hot spots**, which are areas far from the plate where the mantle is particularly hot.

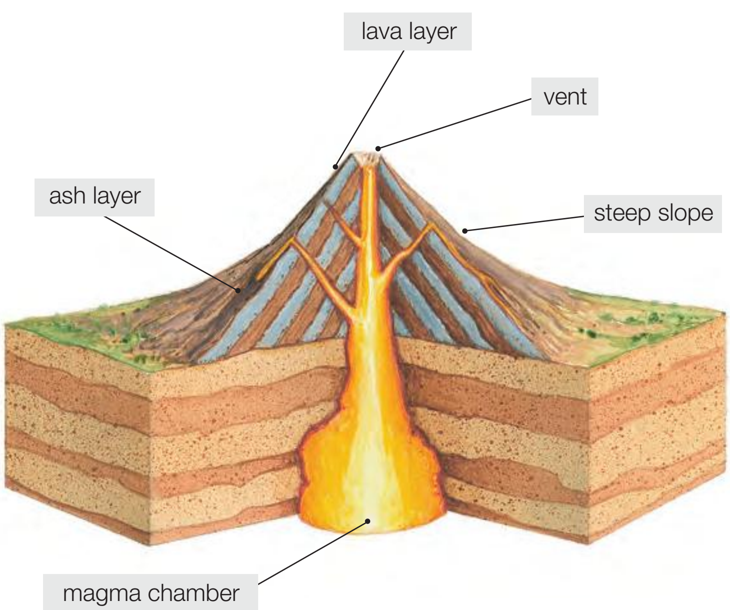
Volcanoes are prone to eruption. An eruption occurs when pressure sends hot magma upward and it forces its way out through a weakness in the crust. Each eruption brings new material to the surface, as **ash** or **lava** or both. As lava flows across the surface, it covers the rocks from previous eruptions and builds up the height of the land in layers. Runny lava can travel many kilometres from the crater and leave behind a shallow layer of new rocks over a wide area. These types of volcanoes are known as **shield volcanoes** (see Source 9). The Hawaiian volcanoes and Mount Kilimanjaro in Tanzania are examples of shield volcanoes.



Source 9 A cutaway diagram of a shield volcano

The more familiar steep-sided **volcanic cones** (see Sources 10 and 11), such as New Zealand's Mount Taranaki and Japan's Mount Fuji, are formed when lava and ash do not travel far from the crater. These materials are then left as a new layer on the sides of the cone, building it higher.

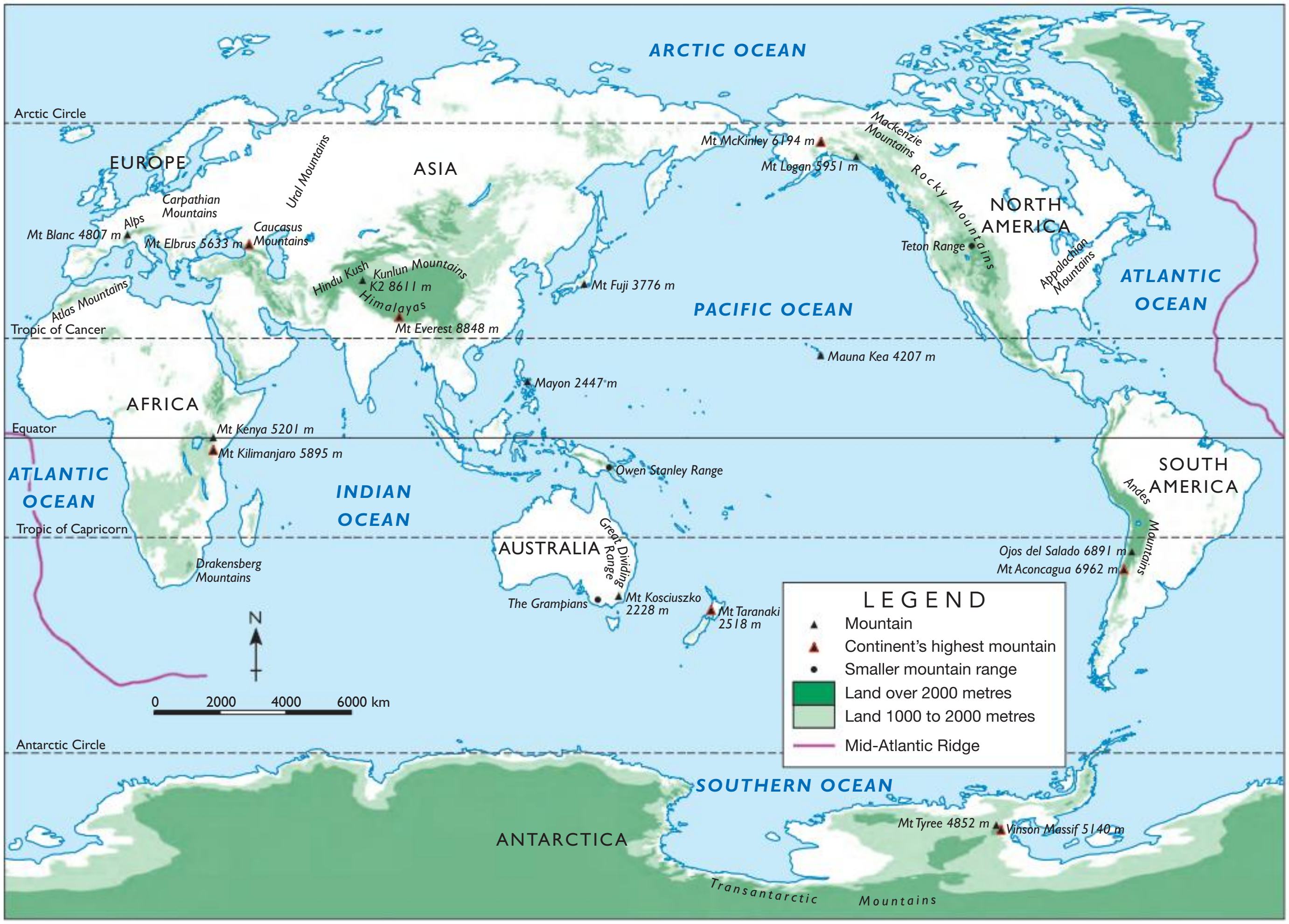
The Hawaiian Islands have been formed above a hot spot. As the Pacific Plate moves over the hot spot, a line of volcanoes has been created. The oldest volcanoes have been eroded so that little remains above sea level. The newest island, Hawaii, has many active volcanoes and is increasing in size every year.



Source 10 A cutaway diagram of a volcanic cone

Source 11 The Mayon volcano in the Philippines is an example of a volcanic cone.

WORLD: MAJOR MOUNTAINS AND MOUNTAIN RANGES



Source 12 This choropleth map shows land over 1000 metres and 2000 metres.

Source: Oxford University Press

3.2 CHECK YOUR LEARNING

Review and understand

1 **Identify** the three main types of mountains.

2 **List** the four layers of the Earth and write a brief description for each.

3 Why do some volcanoes have steep sides while others have gently sloping sides?

Apply and analyse

4 There are four mountain landforms shown in the photos in this topic. **Explain** how the shape of each landform is a result of the way it is created.

5 **Examine** Source 12:

a What type of scale has been used on this map?

b Use the legend to find the highest mountain on each continent. **Rank** these mountains from highest to lowest.

c Use the PQE method to **describe** the distribution of mountains in Asia. You can find sentence starters to help get you started on page 26 of 'The geography toolkit'.

Evaluate and create

6 Read the case study on Victoria's 2021 earthquake and conduct further research on the event. You might even like to speak with friends and family members to find out how they experienced it. Report your findings back to the class.

3.3 Mountains of the world

In this topic, you will:

- » identify and describe the features of the glaciers in the Swiss Alps
- » outline the impact of weathering and erosion on the Swiss Alps
- » compare the glaciers of the Swiss Alps with Cradle Mountain in Australia.

Like all landforms, mountains are worn down by the forces of **erosion**, including wind, water and ice. In high mountain landscapes or in cold places near to the poles, ice is the key agent of erosion. Ice and snow collect in large rivers of ice known as **glaciers**.

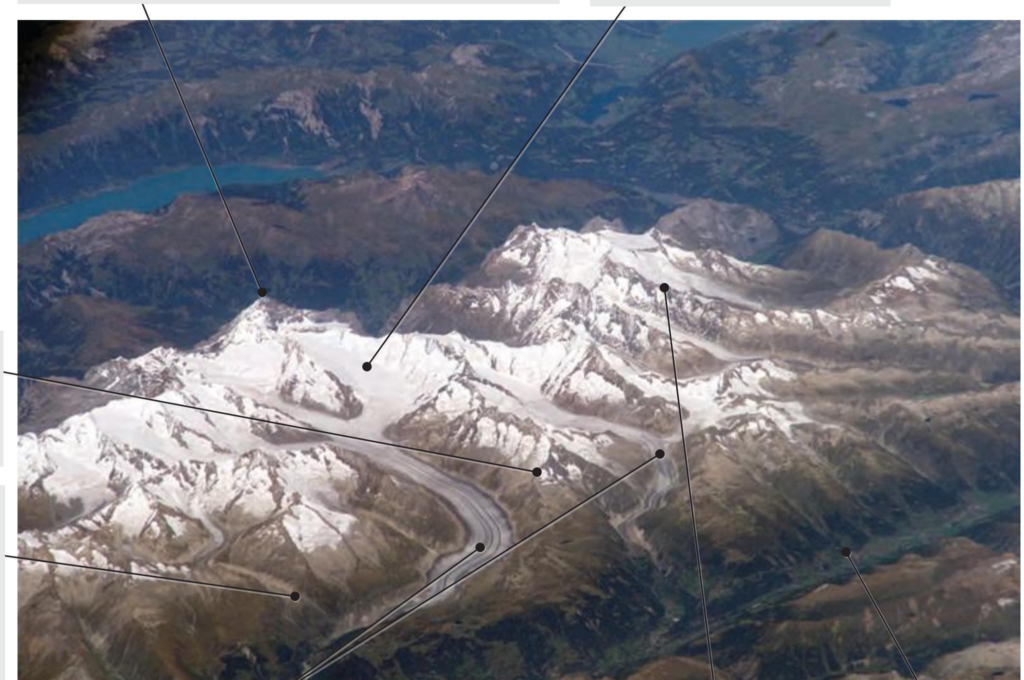
As glaciers move downhill, they grind rocks into small pieces and carry them away. Harder rocks take longer to erode than soft rocks, so they remain longer as distinctive landforms in the mountains. Glaciers melt when temperatures rise, leaving behind a landscape that they have changed greatly.

Source 13 shows the Alps. The Alps are a mountain range in Europe that stretches across France, Switzerland, Germany, Liechtenstein, Italy, Austria and Slovenia. They are most commonly referred to as 'the Swiss Alps', as the section in Switzerland includes the highest peaks in the entire mountain range.

The image in Source 13 was taken by an astronaut on board the International Space Station. It shows many of the key features of a mountain landscape shaped by glaciers, and includes the iconic Mount Eiger.

erosion
the wearing away of the Earth's surface by water, wind and ice

glaciers
rivers of ice in mountain and polar landscapes



Source 13 Glacial landforms of the Swiss Alps

Cradle Mountain: An iconic Australian mountain

Source 14 Cradle Mountain and Dove Lake

Today, the temperature near the top of Australia's mountains is not cold enough to support large glaciers. However, this was not always the case. Over thousands of years, the Earth's temperature has changed, and there have been **ice ages** when it was cold enough for large glaciers to cover much of the mountain landscapes of mainland Australia and Tasmania.

Cradle Mountain is located in the central highlands of Tasmania. It has many of the same glacial formations we see in the Swiss Alps, including cirques and u-shaped valleys. During the last of the ice ages, about 20 000 years ago, Cradle Mountain was covered by a large **ice cap** that geographers estimate was about 6 kilometres deep. Glaciers flowed from its edge, shaping the landscape into what we see today.

Dove Lake, which sits at the base of Cradle Mountain, is a glacial lake. As glaciers moved, they eroded the soil and sediment around them. This created grooves in the land, which the melted water from the glacier filled up. This is how Dove Lake was formed.

ice ages
cooler periods in the Earth's history when ice covered much of the northern hemisphere and sea levels were much lower than they are today

ice cap
a thick layer of ice that covers an area of land

3.3 CHECK YOUR LEARNING

Review and understand

1 What type of landform is Mount Eiger?

2 **Outline** the role glaciers play in eroding high mountains.

3 In your own words, **define** 'glacial lake.'

Apply and analyse

4 **Examine** Source 13.
- a **Identify** as many aretes as you can. **Describe** their position.
- b **Identify** as many horns as you can. **Describe** their position.
- c What evidence is there that there were once many more, larger glaciers in this region? Explain your answer.

5 **Examine** Source 14.
- a What glacial landforms can you identify in this landscape?
- b **Predict** two ways human activities have altered this landscape.

6 **Compare** the geographical features of the Swiss Alps with those of Cradle Mountain. What are the similarities and what are the differences?

Evaluate and create

7 Use Google Earth to explore Mount Eiger and each of its faces. Which side do you think would be the most challenging to climb? Why?

8 Download an image of Mount Eiger or Cradle Mountain from ground level. Label and annotate the landform features you can identify.

Explore it!
A virtual field trip to Mount Eiger

3A

RICH TASK

Quizlet

Revise the key terms you have learnt so far.

The mountains of the Kokoda Track

Papua New Guinea lies on the converging plate boundary between the Pacific and Indo-Australian Plates (see Source 12 on page 61). As a result, Papua New Guinea is a very mountainous country. Its highest mountain, Mount Wilhelm, is more than twice the height of Australia's highest mountain, Mount Kosciuszko.

In 1942, during World War II, the Australian and Japanese armies fought a series of battles along the Kokoda Track in Papua New Guinea. The track crosses a high mountain range, the Owen Stanley Range (see Source 17). The rugged mountains and heavy tropical rainfall made movement along the track very difficult.

Source 15 Steps on the Kokoda Track (AWM 026821)

KEY SKILL
Identifying patterns & relationships

Interpreting a cross-section

Maps are useful tools for showing where places are located, but they do not usually show the height of the land. This is because they show a view from above, rather than from the side. Some maps, such as the one in Source 17, show the height of the land through contour lines. These lines help us to visualise the shape of the land.

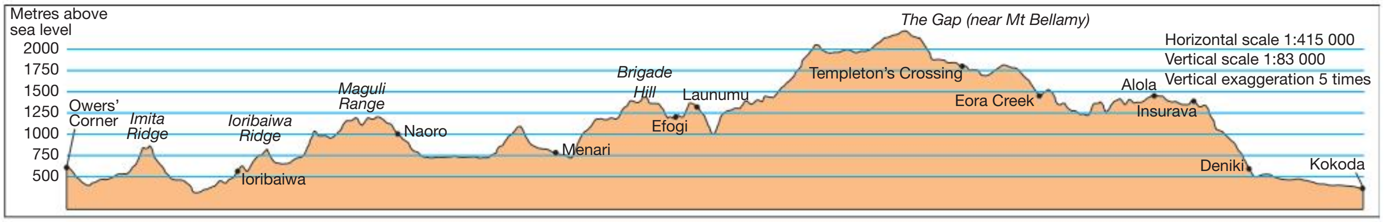
One of the most useful tools that geographers use to see a landscape from the side is a cross-section (see Source 16). This shows the landscape as a view from the side, as if it had been cut along a line.

Step 1 Look at the topographic map of the Owen Stanley Range in Source 17. Find the Kokoda Track, which runs from Owers' Corner to Kokoda on the map. This identifies the section of land shown as a cross-section in Source 16.

Step 2 Look at the cross-section of the Kokoda Track in Source 16.

Step 3 Use the cross-section to estimate the height of the mountains in the Owen Stanley Range.

For more information on this key skill, refer to page 26 of 'The geography toolkit'.



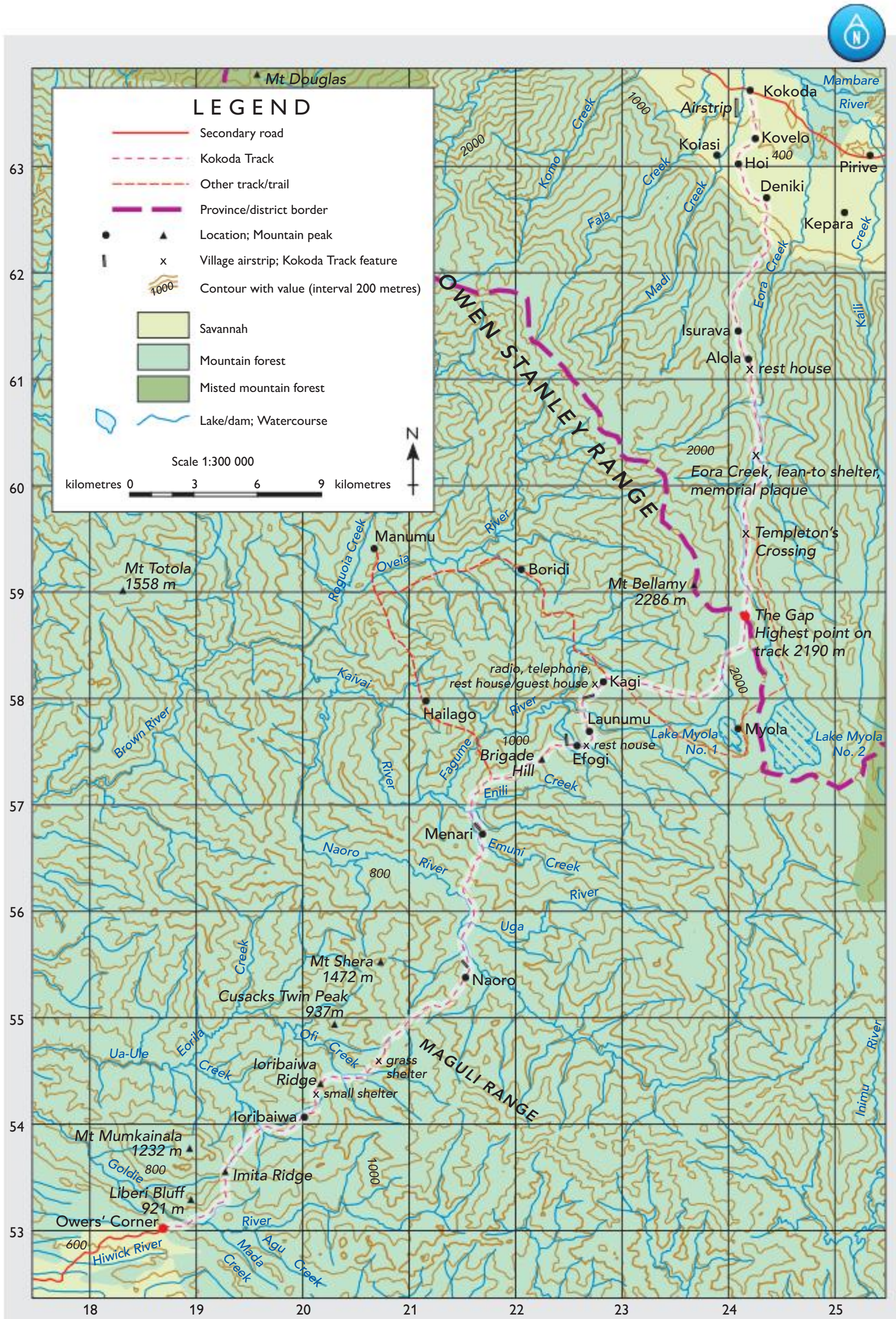
Source 16 Cross-section: Kokoda Track

Practise the skill

1. **Identify** the highest point on the Kokoda Track.
2. How high above sea level is this point?
3. **Explain** why walking the Kokoda Track between Owers' Corner and Naoro is a difficult challenge.
4. a **Identify** which part of the Kokoda Track is steepest. Use evidence from the cross-section to support your answer.
   b Record the grid reference for this area on the topographic map.
   c Record your observations about the contour lines in this part of the map.

Extend your understanding

1. Use your understanding of the forces that create mountains to **explain** the formation of the Owen Stanley Range.
2. What are two difficulties that the people who live in the small villages in this area might experience? **Explain** your answer.
3. **Research** the Kokoda Track campaign. Write a short report that includes:
   a who was involved in the battles
   b how the landscape influenced the fighting that took place.



Source 17 Topographic map of the Owen Stanley Range, Papua New Guinea

Source: Oxford University Press

3.4 Mountain resources

In this topic, you will:

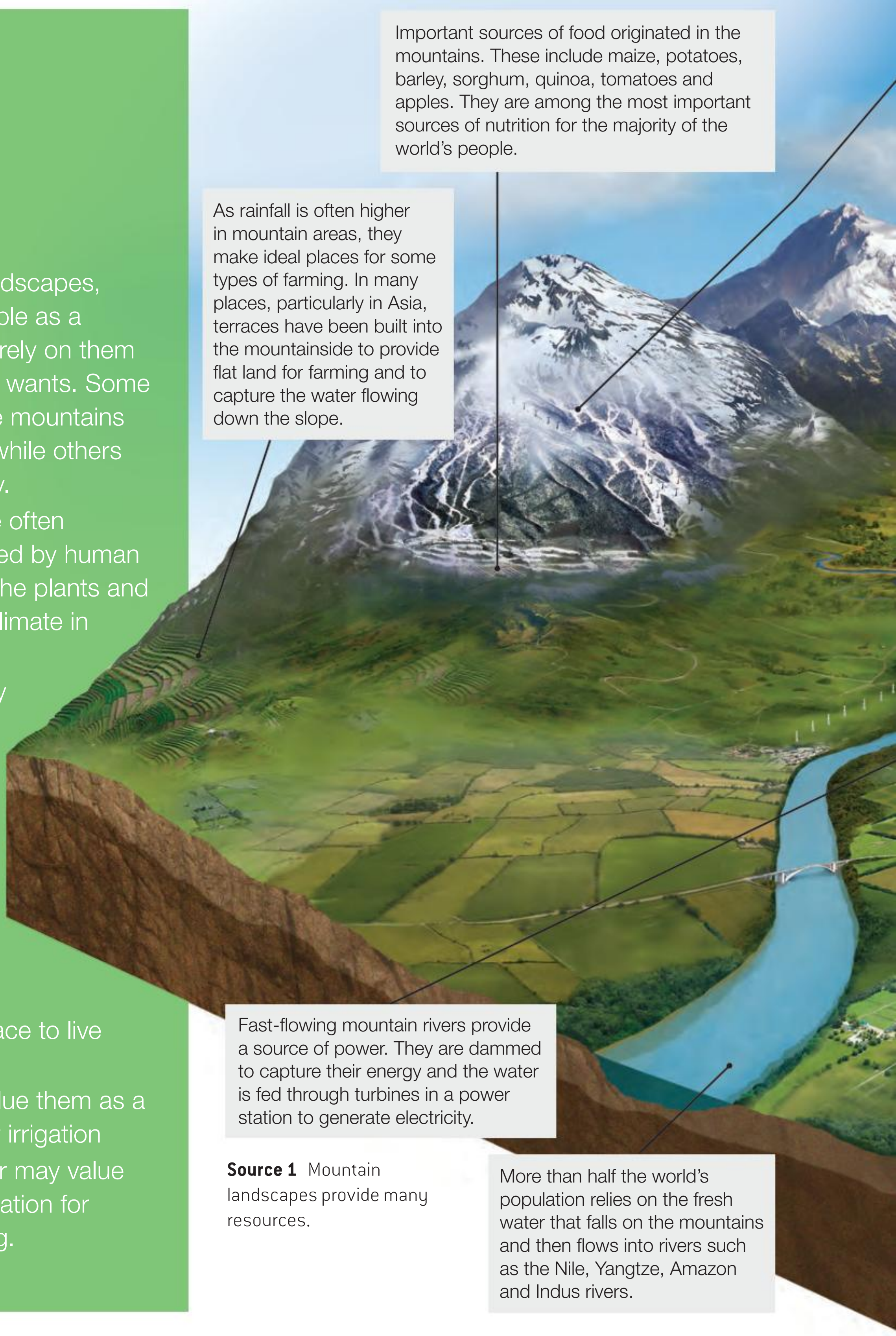
» identify and describe the many ways that humans use mountains.

Like many of the world's landscapes, mountains are used by people as a resource. Billions of people rely on them to satisfy certain needs and wants. Some of the ways in which we use mountains do not change them at all, while others can affect them dramatically.

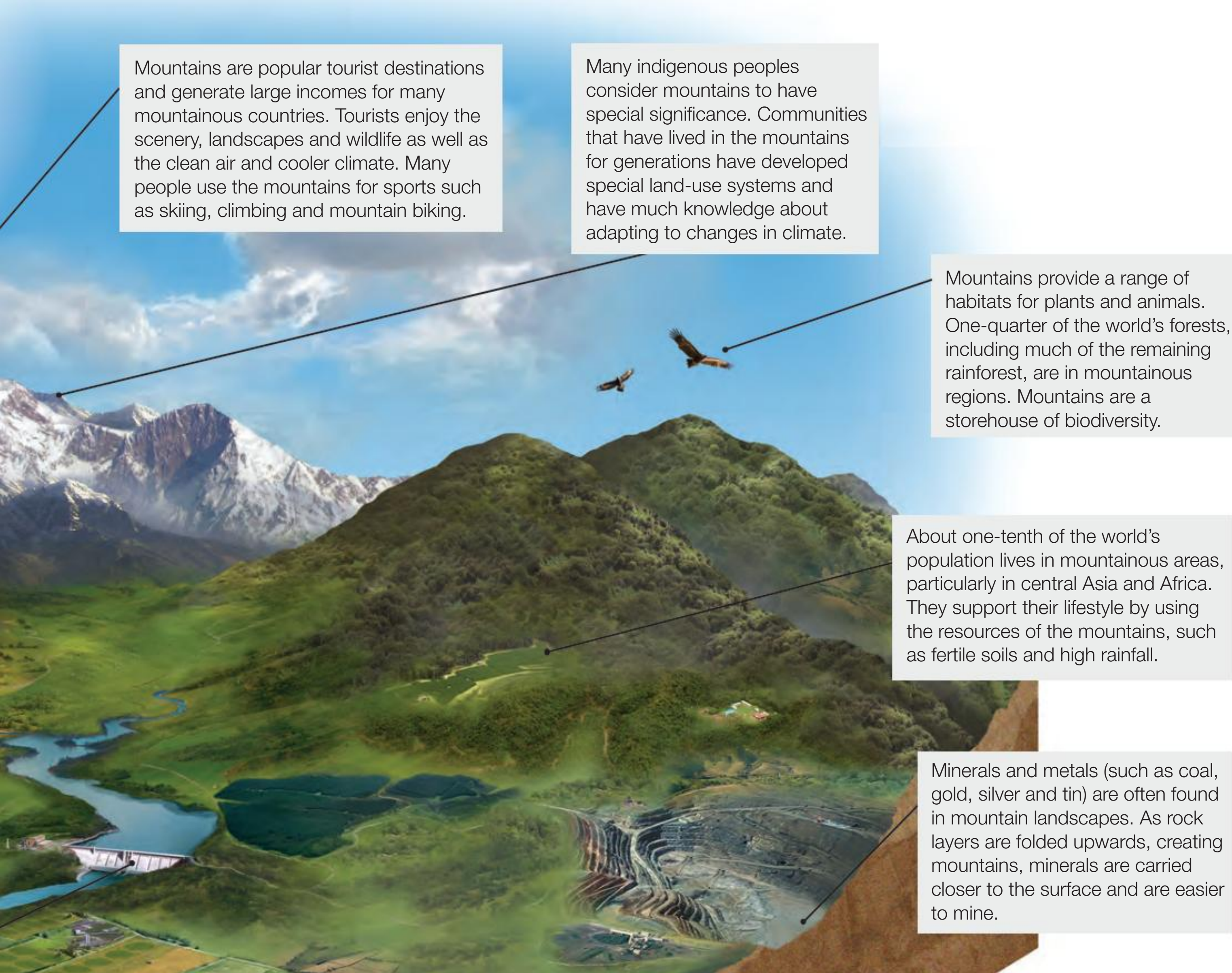
Mountain landscapes are often fragile. Small changes caused by human activities can greatly affect the plants and animals, soil and even the climate in these areas.

Depending on the society and culture into which people are born, and their personal circumstances, they will view and value mountain landscapes differently:

- a member of a tribe from the highlands of Papua New Guinea may value mountains as a place to live and grow crops
- an Indian farmer may value them as a source of fresh water for irrigation
- an Australian city-dweller may value them as a holiday destination for skiing and snowboarding.



Source 1 Mountain landscapes provide many resources.



3.4 CHECK YOUR LEARNING

Review and understand

1 a **Describe** three ways people use mountains.
  b **Classify** your answers from question 1a as being social, economic or environmental.

Apply and analyse

2 **Analyse** the impact of tourism in mountainous places. Remember, when you analyse something, you need to break it down into smaller parts, and talk about how those parts relate to each other.

3 a **Classify** the uses of mountains shown in Source 1 as either harmful to the natural environment or not harmful.
  b Which of these uses is likely to cause the most change to the natural environment and why?

Evaluate and create

4 Which of the mountain uses shown in Source 1 is the most important? **Justify** (give reasons) for your answer.

5 As the Earth's climate warms, there is less snow and ice on high mountains.
  a **List** the mountain uses that are likely to be impacted by these changes.
  b **Explain** how you think two of them will be impacted.
  c Climate change is caused by many things, including traffic on the roads, raising cattle for meat and burning fossil fuels for electricity. **Propose** (put forward) one strategy that you could use in your daily life to help reduce the impact of climate change.

3.5 The impacts of farming on mountains

In this topic, you will:

- describe the human effects of farming on mountain landscapes.

Mountainous landscapes can be great places for farming. They receive reliable rainfall and often contain large areas of fertile soil. However, farming on mountains brings many challenges. The greatest of these challenges is a lack of flat land.

Flat land allows farmers to irrigate their fields without the water draining away. In many places, including South America, Europe and Asia, mountain landscapes have been **terraced** to create flat land and allow farmers to trap and control the flow of water (see Source 2). Flat land also makes it easier to use animals or tractors for tasks such as ploughing.

terraced
formed a flat area on a sloping piece of land (such as a mountain face)

While terraces have provided food security in many countries for hundreds of years, geographers are beginning to understand that the way they are being used is having major impacts on the environment.

Abandoning the land

In order to stop them collapsing, terraces need to be continually maintained. This takes a lot of time and a large number of people. In the past 30 years, however, the movement of people from small farming areas to large cities has begun to impact on how well these terraces are maintained. In **developing countries**, young people in particular have moved to large cities in search of a different life.

developing countries
less economically developed countries that have some difficulties in supporting the needs of their own people

The result of this is a number of terraces that have been abandoned and are no longer being maintained. These terraces are now collapsing, as centuries-old farming knowledge has left the area and is no longer being passed down. Collapsing terraces cause an increase in soil erosion, as rainwater flows more quickly down the slope and washes away the precious topsoil.

Source 2 Farming terraces in Nepal

Source 3 Abandoned terraces in the mountains of Portugal

Changes in farming practices

As the number of workers in remote farming areas declines, farmers are forced to move away from traditional farming methods and towards more automated practices. One example of this is farmers swapping traditional ploughing methods (using a plough pulled by water buffalos or oxen) for tractors.

Heavy tractors compact the soil. This means that water is no longer able to soak through, making the soil less fertile. As the terraces become less fertile and produce fewer crops, they are abandoned.

Changes in land use

Even though soil becomes less fertile and produces fewer crops, the demand for food remains as high as ever. This forces farmers to look elsewhere. As a result, many farmers are moving into areas once considered unsuitable for farming. These areas include bare landscapes, such as rocky and sandy areas, as well as forests.

To make forests suitable for farming, they must be cleared (a process known as **deforestation**). Deforestation has many negative impacts on the environment. For example, soil erosion increases dramatically when the trees that usually protect soil from the rain are cleared (especially in tropical areas).

deforestation
the action of clearing a wide area of trees

CASE STUDY

Nepal

Nepal is one of the most mountainous countries on Earth. As a result, only one-fifth of the country's land is suitable for farming. Despite this, most Nepalese people are farmers. The main crops produced throughout the country are rice and corn. Both require flat land, so most Nepalese farms are terraced into steep hillsides.

However, in recent years, as many people have moved to the cities, farms have spread to forests and bare land throughout the country. As a result, there has been a significant increase in soil erosion. This has led to a loss of soil fertility in these areas and has pushed farmers onto even more marginal land. Sources 4 to 6 show the amount of soil eroded per year for different types of land use in Nepal.

Source 4 On land dedicated to agricultural (farming) use, 21.5 tonnes of topsoil are eroded per hectare per year.

Source 5 On bare land, 8.9 tonnes of topsoil are eroded per hectare per year.

Source 6 In forests, 0.3 tonnes of topsoil are eroded per hectare per year.

Source: Data courtesy of Science Direct

Key skill worksheet
Interpreting geographical images: Comparing different types of geographical images

KEY CONCEPT
Sustainabilty

Regenerative farming

Farmers must be careful to use soil sustainably. If they grow too many crops or graze too many animals, the soil will lose its fertility and become unsuitable for farming.

Canadian farmers Cody Straza and Allison Squires own a farm in the province of Wood Mountain, Saskatchewan. They use the five principles of regenerative farming to improve the health of the farm's soil: good water management, minimal use of machinery, crop diversity (the use of different types of crops rather than just one), livestock and cover crops. A cover crop is a crop grown for the protection and enrichment of the soil. This practice dates all the way back to the Roman Empire.

As a result, Cody and Allison have seen huge improvements in the quantity and quality of their soil. This practice should ensure the sustainability of their farm into the future.

For more information on this key concept, refer to page 9 of 'The geography toolkit'.

Source 7 Cody Straza and Allison Squires

3.5 CHECK YOUR LEARNING

Review and understand

1 **Identify** two reasons why mountains are good places for farming.

2 **Identify** how replacing animal labour (such as water buffalos and oxen) with machines changes the soil in mountain areas.

3 **Identify** and **describe** the impact of farming on mountain landscapes. Use evidence from one of the sources in this topic in your description.

Apply and analyse

4 Using data from Sources 4 to 6, **explain** what happens to soil if forests and bare land are replaced with farms.

5 Read the case study 'Regenerative farming'. **Analyse** the impact (effectiveness) of using regenerative farming to achieve sustainability. Remember, when you analyse something, you need to break it down into smaller parts, and talk about how those parts relate to each other.

Evaluate and create

6 **Create** a flow diagram with labelled boxes and arrows to show how young people leaving farming areas leads to other problems.

7 'Soil erosion is a human impact on mountain landscapes.' **To what extent** do you agree with this? A lot (strongly), a little bit (somewhat) or not at all? Write a short paragraph explaining your position. Use evidence from this topic to support your answer.

3.6 The impacts of climate change on mountains

In this topic, you will:

- investigate the impacts of climate change on mountains, including the impact on land, people, plants and animals.

The Earth's average temperature has risen by about 1°C in the past century. It is expected to rise by another 1.5°C in the next 80 years. While this might not seem like a large rise, it has led to dramatic changes in many landscapes, including mountains. The most obvious change is the melting of ice.

Virtually all the world's mountain glaciers are melting, and becoming shorter and thinner. This is known as **glacial retreat**. Some glaciers have disappeared completely. Glacial retreat is a serious threat to people living in areas where it is taking place, many of them in developing countries such as Bangladesh, India and Pakistan.

More than 1 billion people around the world rely on the water stored in glaciers. Typically, glaciers melt a little bit each year, producing water that irrigates terraces and fills rivers. The water in these rivers is also used to generate electricity in hydroelectric power stations. In places such as Japan, where there is a huge tourism industry for skiing, glacial retreat threatens the economy as well as the environment.

glacial retreat where the lowest point of a glacier does not extend as far down the mountain as it did previously; this is happening more often because of climate change

KEY SKILL Interpreting geographical images

Using historical imagery

Source 8 gives us an insight into how the Trient Glacier in Switzerland has changed over time. The geographer in the picture is holding up a photograph of the Trient Glacier from 1891 to compare what it looked like then with what it looks like now.

Using Google Earth, you can investigate this change at a more advanced and precise level using the 'historical imagery' tool. Complete the following steps to investigate change at the Trient Glacier:

Step 1 Make sure you have Google Earth installed on your device.

Step 2 Search for the Trient Glacier in Google Earth. It will automatically display the image of what the glacier looks like today.

Step 3 On the toolbar at the top of your screen, click the small clock icon. This icon represents the 'historical imagery' tool and when clicked, a sliding scale will appear in the top left-hand corner of your screen.

Step 4 Investigate the change over time by sliding your cursor up and down the scale.

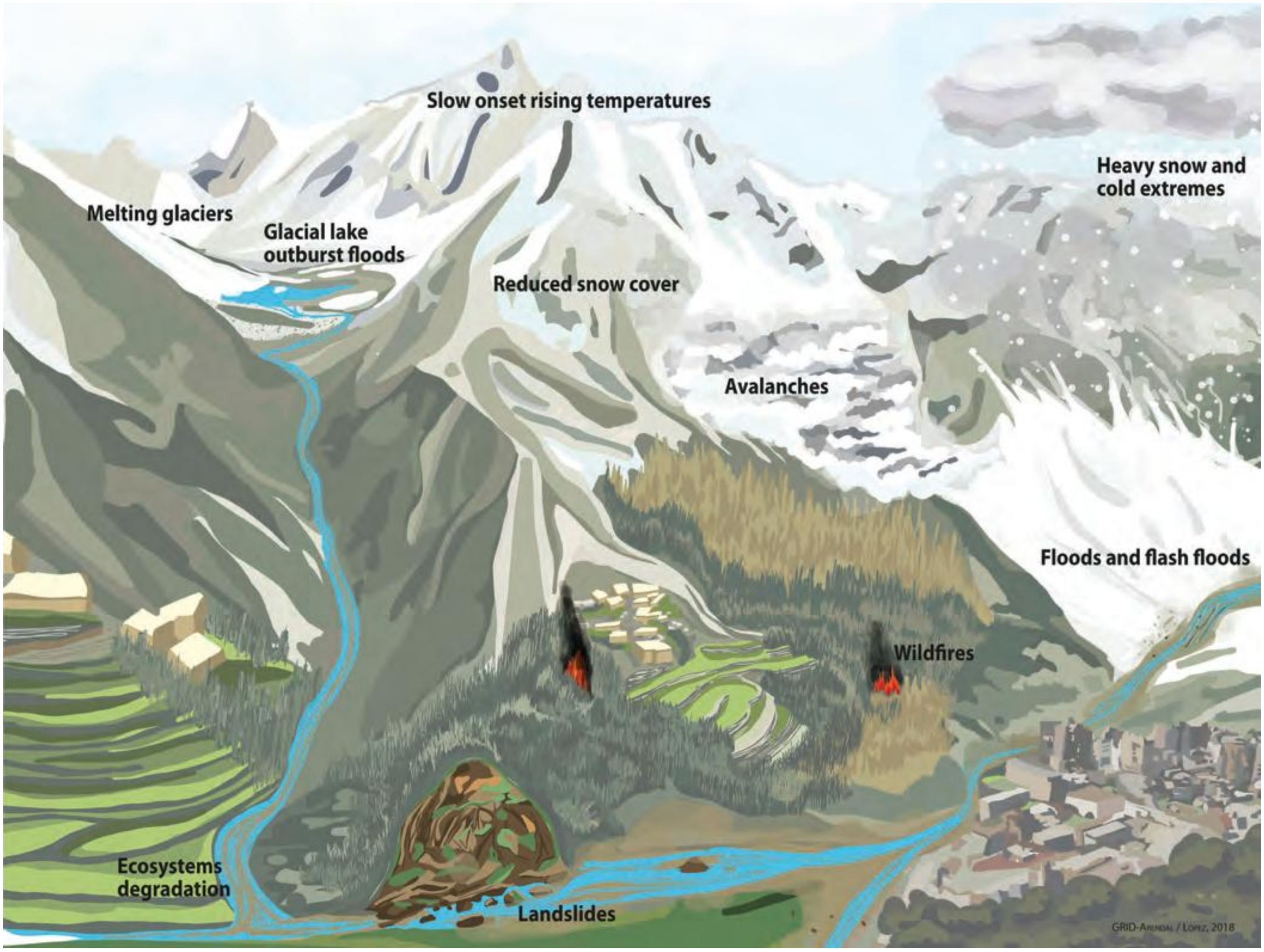
Practise the skill

1 Write a paragraph that **describes** the change of the Trient Glacier over time. Refer to three specific points in time to support your answer.

Source 8 A photograph of the Trient Glacier in Switzerland taken in 1891, held up at the same location in 2019

Climate-related hazards

Climate change has made mountain landscapes more dangerous for visitors and locals. Source 9 shows some of the hazards in mountainous places that have become more severe due to rising temperatures and changes to rainfall and snow patterns.



Source 9 Hazards in mountain areas have been heightened by climate change.

The escalator to extinction

As temperatures rise, plants and animals that thrive in cold temperatures are forced to move further up the mountain slopes. On mountain tops and ridges where the snow and ice are disappearing, many species face extinction. Scientists have called this the 'escalator to extinction', as species are packed together into shrinking spaces and brought into conflict with each other.

One of these animals is the snow leopard of central Asia, whose home is in the Himalayas. The snow leopard has been threatened for a long time by poaching and habitat loss. Climate change has brought new threats to this endangered species. As temperatures rise in the Himalayas, plant species (such as trees) adapt and grow further up the slopes. Snow leopards prefer rocky places, which means they are displaced by these trees and forced further up the escalator to extinction.

As temperatures rise, farmers are also able to bring their livestock into higher areas of the mountain (which were once uninhabitable for livestock) for summer grazing. In order to protect their herds, farmers may kill the leopards.

Once widespread throughout the region, there may be as few as 3000 mature snow leopards left in the wild.

Source 10 The endangered snow leopard of central Asia

Think, pair, share

There are more than 600 snow leopards in zoos, including in four Australian zoos. Some people believe that this helps to ensure their survival as a species, but others feel that animals requiring large spaces should not be kept in zoos.

- Think about whether animals such as these should be kept in zoos.
- Discuss your ideas with a partner.
- Share your thoughts with the class.

3.6 CHECK YOUR LEARNING

Review and understand

1 Why are the world's mountain glaciers shrinking?

2 **Describe** one impact of climate change on each of the following:

a the land in mountain landscapes

b the people in mountain landscapes

c the plants and animals in mountain landscapes.

3 In your own words, **outline** the process known as the 'escalator to extinction'.

Apply and analyse

4 Source 9 shows that floods are becoming more common in mountain areas. **Explain** why this is the case.

Evaluate and create

5 'The temperature is only changing by 1 degree every hundred years. So what?'

To what extent do you agree with this? A lot (strongly), a little bit (somewhat) or not at all? Write a short paragraph explaining your position. Use evidence from this topic to support your answer.

6 There are several Australian animals on the escalator to extinction. Using the internet, **research** the dangers faced by the white lemuroid ringtail possum and the mountain pygmy possum in Australia.

Quiz me!

A quick quiz on the impact of climate change on mountains

3.7 Protecting the mountains

> **In this topic, you will:**
> » investigate the methods used to protect mountain landscapes in Tasmania.

Some countries protect their mountains by declaring them to be national parks or nature reserves. Some of these locations are given further protection by being included on the United Nations (UN) World Heritage List.

The Tasmanian Wilderness World Heritage Area

The Tasmanian Wilderness World Heritage Area (TWWHA) in south-west Tasmania is one of the special places included on the United Nations World Heritage List. This protected area makes up one-fifth of Tasmania's entire area. The Tasmanian Parks and Wildlife Service claims that the area 'protects one of the last true wilderness regions on Earth and encompasses a greater range of natural and cultural values than any other region on Earth'.

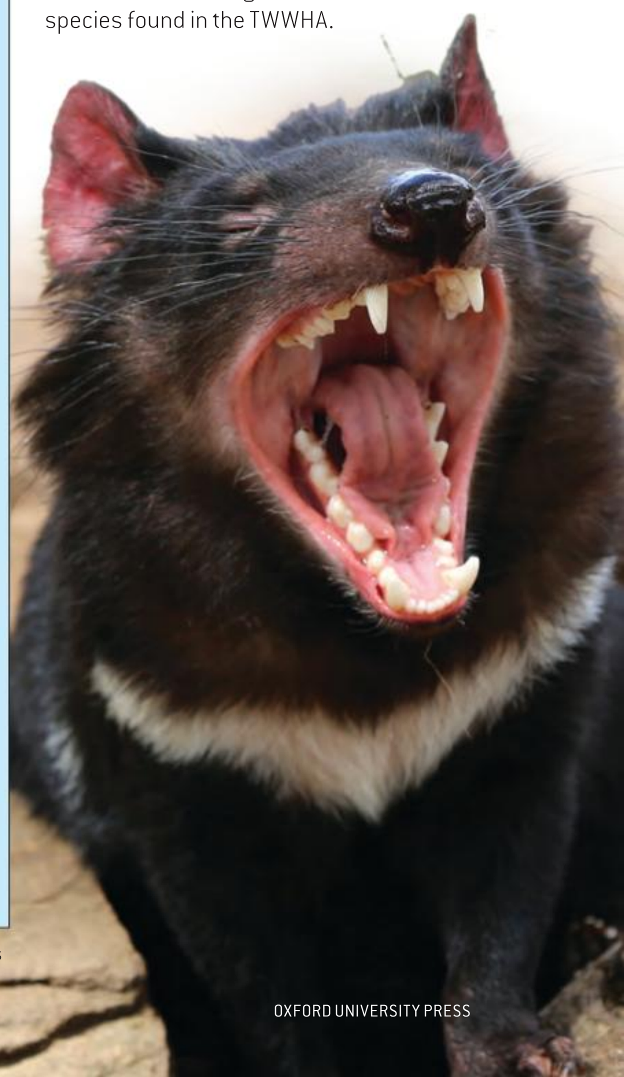
While fold mountains dominate in the east of the TWWHA, rugged fault-block mountains dominate the west. A large part of the area has been eroded by glaciers, and this has led to some spectacular landforms. Most of the TWWHA is blanketed by rainforest, but there are also areas of mountain vegetation and wetlands. Nineteen endangered animal species are found in the TWWHA, including the Tasmanian devil.

> **Key skill worksheet**
> Analysing maps: Reading map scales

TASMANIA: TASMANIAN WILDERNESS WORLD HERITAGE AREA

Source 12 The TWWHA is made up of several national parks. Source: Oxford University Press

Source 11 The Tasmanian devil is one of the 19 endangered animal species found in the TWWHA.



Cultural significance

The TWWHA is included on the UN World Heritage List not only for its natural beauty, but also for its cultural importance. It contains evidence of Aboriginal peoples living in the area dating back over 42 000 years. This evidence includes rock shelters and caves where these peoples lived. At the time, these Aboriginal peoples were the southernmost-located group of humans living during the last Ice Age.

Researchers have found more than 1000 Aboriginal sites in the TWWHA, including Kutikina Cave (see Source 13). In 2006, geographers conducted research on this cave, which uncovered a great deal about the way of life of the Aboriginal peoples who lived there thousands of years ago. They found animal bones on the floor of the cave, proving that the Aboriginal peoples hunted and ate wallaby, wombat and emu.

The Tasmanian Parks and Wildlife Service works closely with Aboriginal rangers today to ensure that the Kutikina Cave and other sites in the TWWHA are protected from human activity.

Source 13 Archaeologists explore Kutikina Cave. Discoveries made at this site helped to stop a plan to dam the nearby Franklin River in the 1980s. The cave would have been submerged beneath the dammed river.

Source 14 Needwonnee Walk contains interpretive installations that help visitors to the TWWHA understand the way of life of the Needwonnee people of south-west Tasmania.

3.7 CHECK YOUR LEARNING

Review and understand

1 How do some countries protect their mountains?

2 **Describe** some of the natural features that make Tasmania's mountain landscapes special.

3 **Outline** why Kutikina Cave is a significant place in Australian history.

Apply and analyse

4 **Examine** Source 12 and answer the following:
   - a Identify how many national parks are shown on this map.
   - b Using the scale provided, measure the distance from:
     - i Mount Wellington to Cradle Mountain
     - ii Mount Field National Park to Mount William National Park
     - iii Kutikina Cave to the nearest coast.

5 **Explain** why it is important to consult Aboriginal peoples when protecting our landscapes.

Evaluate and create

6 Other significant mountain landscapes on the World Heritage List include the Virunga Mountains, the Himalayas, Mount Kilimanjaro and Macchu Piccu.
   - a **Research** one of these places and the threats that it faces.
   - b Do you think the TWWHA faces the same threats? **Justify** (give reasons for) your response.

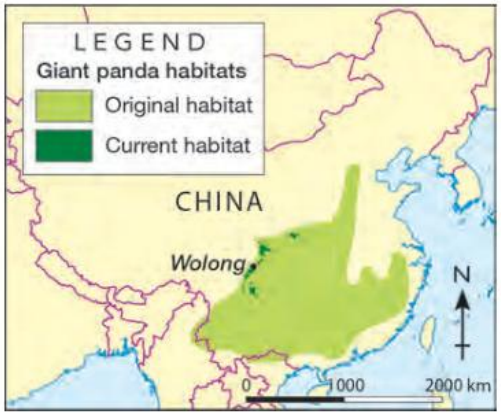
3B RICH TASK

Quizlet
Revise the key terms you have learnt so far.

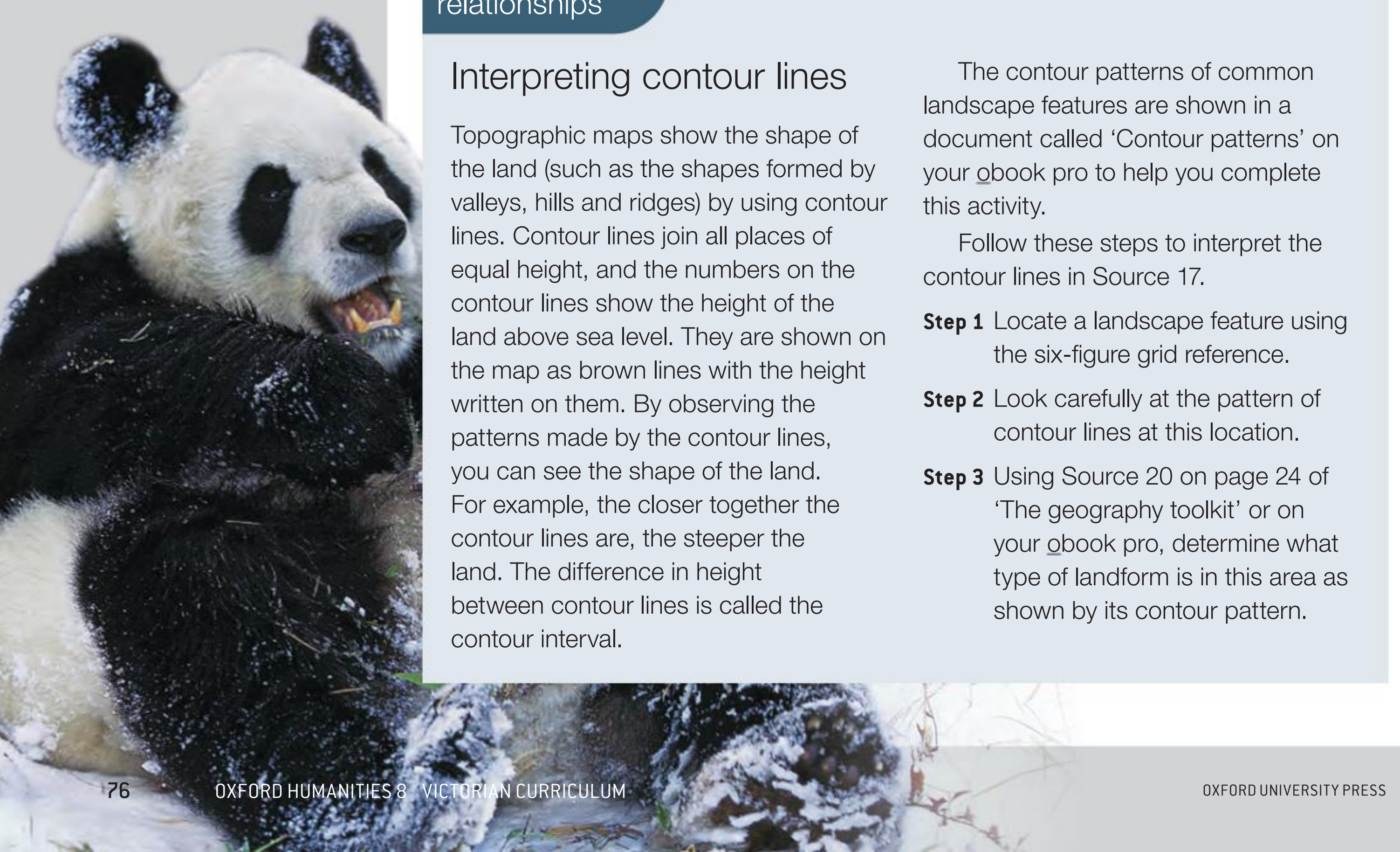
Wolong National Nature Reserve, China

Mountain landscapes are home to some of the world's most endangered animals, including one of the most iconic – the giant panda. Once widespread throughout the mountains of southern China, giant pandas are now limited to a few bamboo forest reserves. The largest of these reserves is the Wolong National Nature Reserve in Sichuan Province, which is home to about 150 giant pandas.

CHANGE IN PANDA HABITAT IN CHINA OVER TIME



Source 15 Source: Oxford University Press



Source 16 A giant panda in the mountains of the Wolong National Nature Reserve

KEY SKILL Identifying patterns & relationships

Document
Contour patterns

Interpreting contour lines

Topographic maps show the shape of the land (such as the shapes formed by valleys, hills and ridges) by using contour lines. Contour lines join all places of equal height, and the numbers on the contour lines show the height of the land above sea level. They are shown on the map as brown lines with the height written on them. By observing the patterns made by the contour lines, you can see the shape of the land. For example, the closer together the contour lines are, the steeper the land. The difference in height between contour lines is called the contour interval.

The contour patterns of common landscape features are shown in a document called 'Contour patterns' on your obook pro to help you complete this activity.

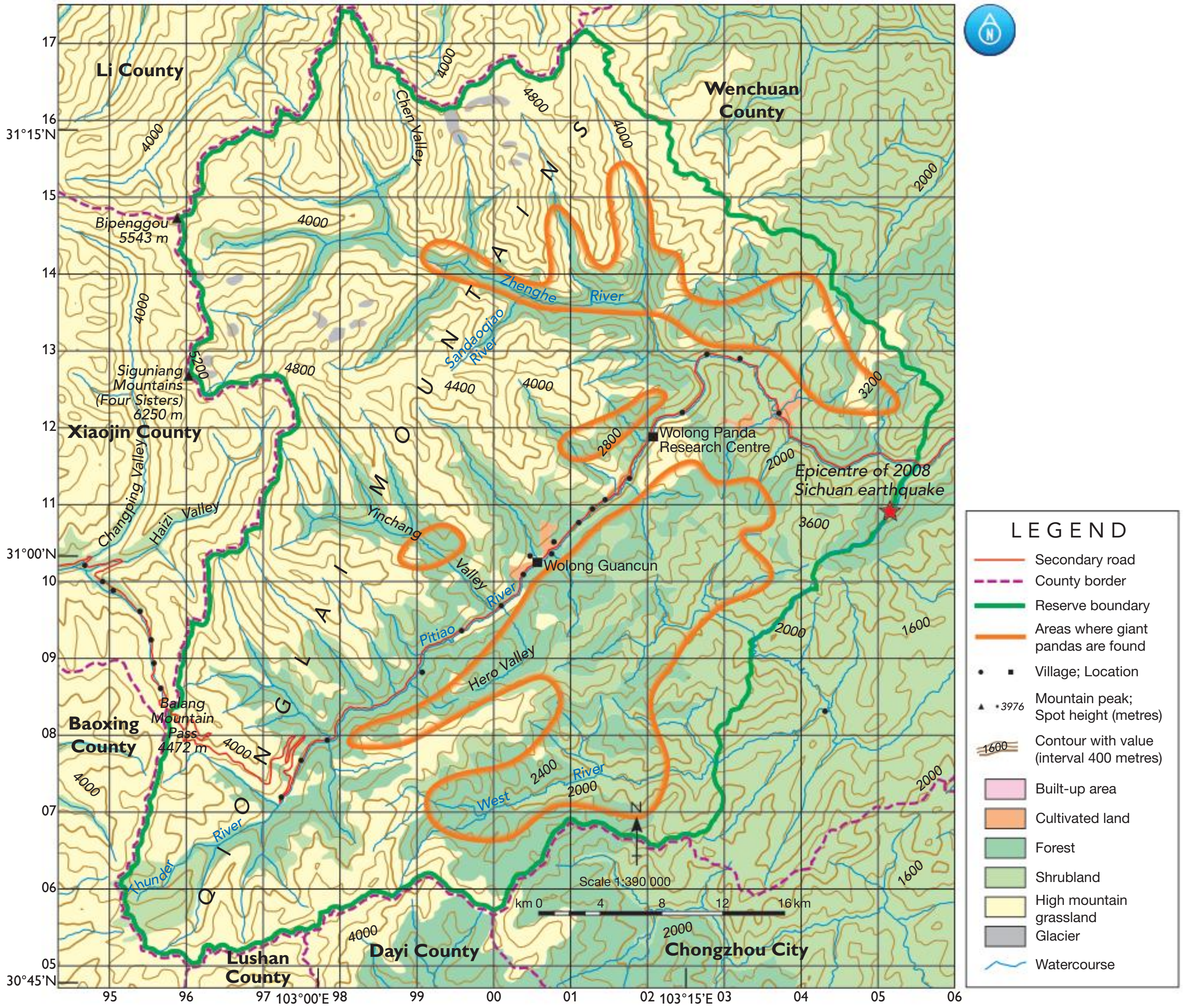
Follow these steps to interpret the contour lines in Source 17.

Step 1 Locate a landscape feature using the six-figure grid reference.

Step 2 Look carefully at the pattern of contour lines at this location.

Step 3 Using Source 20 on page 24 of 'The geography toolkit' or on your obook pro, determine what type of landform is in this area as shown by its contour pattern.

WOLONG NATIONAL NATURE RESERVE, CHINA



Source 17

Source: Oxford University Press

Practise the skill

1 **Identify** the landform features at each of the following places in Source 17:

a GR 050142 c GR 996110
b GR 015146 d GR 037075.

2 Would you describe the landscape in this area as mountainous? Use evidence from the map to support your answer.

3 Refer to the 'Contour patterns' document on your obook pro. Give a six-figure grid reference for the following features (do not use the examples given in question 1):

a ridge b valley c spur.

Extend your understanding

1 Study Source 15. **Describe** the change over time between the giant pandas' original and current habitats. What are some possible reasons for this?

2 Do you think that the reserves such as Wolong will save the pandas from extinction? **Research** this issue further and find two reputable sources to support your answer. Write a paragraph that shows your informed position.

3.8 Volcanoes

In this topic, you will:

- » investigate the causes of volcanic eruptions
- » outline how humans respond to volcanoes, and prepare for them in the future.

How volcanoes erupt

Inside a volcano, magma (liquid rock) under the Earth's surface is stored in the magma chamber. From here, several complex steps take place in order for the volcano to erupt. Source 1 outlines these steps and what can happen afterwards.

1. Magma rises through the volcanic vent (an opening in the Earth's crust).
2. As magma travels upwards, gases start to expand, which creates pressure.
3. When this pressure can no longer be contained, the volcano erupts through the main volcanic vent and other vents (known as branch pipes).
4. From here, lava can flow like a molten river or rain down in '**volcanic bombs**' many kilometres from the eruption site.
5. Ash can cover the sky and blanket the landscape in a cloud that can kill people and animals.
6. Mudslides, floods and **tsunamis** can also be caused by eruptions.

Source 1 The process and aftermath of a volcanic eruption

tsunamis
giant ocean waves, often caused by underwater earthquakes

volcanic bombs
masses of liquid rock that explode from a volcano and harden before reaching the ground

The dangers of volcanic eruptions

Humans are generally powerless in the face of the hazards created by volcanic eruptions.

Volcanic eruptions can produce huge, dangerous clouds of volcanic ash. These clouds are created from the sudden release of the enormous pressure from within the Earth's mantle and crust. The ash can travel straight up (vertically) and then fall on the surrounding landscape, or it can travel sideways (horizontally). Horizontal eruptions are perhaps the most dangerous, as the ash – along with rocks, boulders and gases – can travel at speeds of 700 kilometres per hour and carry material heated to 1000°C. These are called **pyroclastic flows** and are responsible for much of the devastation caused by many of the world's worst volcanic eruptions.

The sudden melting of the snow and ice on the sides of the volcano is also dangerous. This can cause huge mudslides up to 50 metres thick, called **lahars**, to sweep down the sides of mountains. The eruption of Colombia's Nevado del Ruiz volcano in 1985 covered whole villages with thick mud and ash, killing 23 000 people. This makes it the deadliest volcanic eruption of the past 100 years.

pyroclastic flows
fast-moving and dangerous mixtures of hot gas and rock that are ejected from volcanoes

lahars
destructive flows of mud or debris on the slopes of volcanoes

Source 2 Pyroclastic flow from Soufriere Hills volcano in the Tar River Valley, Montserrat, Caribbean

Responding to eruptions

Volcanic eruptions can occur with little warning and cause massive damage. This makes them difficult to prepare for, but there are some things that people can do to reduce their chances of being affected by a volcanic eruption.

The first of these is to avoid active volcanoes. People living on the slopes of Mount Vesuvius (near Naples, in Italy), for example, have each been offered 30 000 euros (about $48 000 in Australian dollars) to relocate to safer areas. The Italian Government has rezoned the area, so that the upper slopes of the mountain are now a national park where no one can live. Visitors should also avoid active volcanoes.

We can also monitor volcanoes very carefully for signs of an eruption. These signs include small earthquakes, which cause lava to move upwards and create a bulge in the side of the volcano as pressure builds. **Volcanologists** can pass on information about changes like these to local authorities, which may evacuate an area at risk.

Scientists studying Mount Etna in Italy have recently discovered that the volcano's internal sounds change before an eruption. By using sensors that can hear sounds which humans cannot, they have been able to successfully predict 57 eruptions in eight years. The system is now automated, and sends a message to scientists one hour prior to an eruption.

volcanologists
scientists who study and monitor volcanoes

Source 3 A volcanologist observing an eruption of Mount Etna on the island of Sicily, which is Europe's most active volcano

3.8 CHECK YOUR LEARNING

Review and understand

1 **Identify** two mountain hazards other than volcanic eruptions.

2 **Define** the following terms in your own words:
  a tsunami
  b lahar
  c pyroclastic flow.

3 a **Outline** some of the dangers people living near a volcano face.
  b How can they reduce these dangers?

Apply and analyse

4 In your own words, **explain** the process that causes a volcanic eruption.

5 How could a volcanic eruption impact on people who live hundreds of kilometres away from the volcano? Use evidence from this topic to support your answer.

6 Brainstorm 10 impacts of a volcanic eruption. **Classify** these impacts as being environmental, social or economic.

Evaluate and create

7 **Evaluate** how useful the remote sensing system for Mount Etna is by answering these questions:
  a What are its strengths?
  b What are its weaknesses?
  c What is your overall opinion of this system?

8 Mount Ruapehu in the centre of New Zealand's North Island is an active volcano. **Research** the lahar warning system in place on this mountain and record 10 interesting facts. Write a bibliography from your research.

See, think, wonder
Look at Source 3.
- What do you see?
- What do you think?
- What do you wonder?

Watch it!
A video and quiz on volcanoes

3.9 Indonesia: Home of the volcano

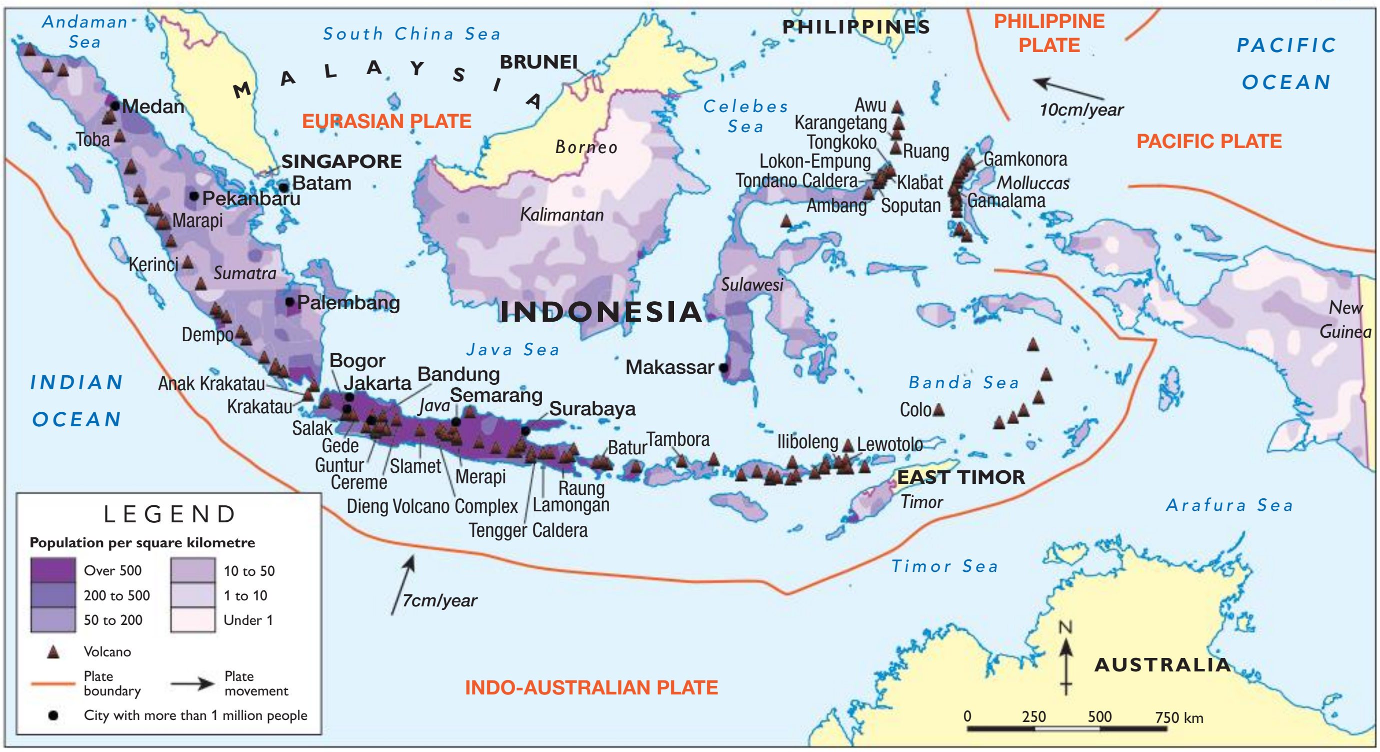
In this topic, you will:

- examine volcanic eruptions in Indonesia
- understand the impacts that these volcanic eruptions have had on the landscape and community.

Indonesia is one of the most volcanic countries on Earth. It is home to almost 150 volcanoes, half of which are considered active. This is due to its location on the boundary between four tectonic plates. In the south, the Indo-Australian Plate moves northwards and is forced beneath the Eurasian Plate, creating a long arc of volcanic islands (see Source 12 on page 61). In the north, the collision of the Philippine and Pacific Plates has created a second cluster of volcanoes.

This volcanic activity is typical of many countries on the edge of the Pacific Plate. About 90 per cent of the world's earthquakes and volcanoes occur on this plate boundary, earning it the nickname of the 'ring of fire'.

VOLCANOES, TECTONIC PLATES AND POPULATION DENSITY OF INDONESIA



Source 4

Source: Oxford University Press

Key skill worksheet
Analysing maps: Using a map legend

Deadly volcanic eruptions

It is estimated that about 5 million Indonesians live in volcanic danger zones and that there is a major eruption in the country about once a year. While most of the eruptions occur away from populated areas, that is not always the case. In the past 100 years, there have been 11 extremely deadly volcanic eruptions, the most recent of which was the 2018 eruption of Anak Krakatau, which killed 437 people.

The deadliest volcanic eruption of all time took place in Indonesia in 1815, when Mount Tambora erupted (see Source 8 on pages 82 to 83). About 92 000 people were killed by the pyroclastic flow from the eruption and the tsunami it triggered.

More than 100 cubic kilometres of new material (ash and lava) was produced by the eruption and deposited on the Earth's surface. So much ash was released into the atmosphere it changed the climate of the planet. In Europe, 1816 was called the 'year without a summer', as ash from Tambora blocked the sun for many months. Volcanologists have labelled the Mount Tambora eruption as a 'super-colossal eruption', meaning that it released more than 100 cubic kilometres of material at one point in time. It is the only super-colossal eruption to have occurred in the past 750 years.

Volcanic gifts

While living near a volcano is very risky, volcanoes do produce some benefits. Many precious stones and minerals are formed by volcanic activity. For example:

- In South Africa, diamonds are produced deep below the Earth's crust and carried to the surface by volcanic eruptions.
- In the United States, copper deposits are created by volcanic activity.
- In some places like New Zealand and Hawaii, volcanic hot springs are used to produce electricity.

Perhaps the greatest gift of volcanoes is the soil they produce. Both lava and ash contain minerals that help plants grow. When they break down, these minerals are released into the soil. People can then use this soil to grow crops and raise livestock.

For this reason, places with volcanic soils – such as the island of Java, which has 76 active volcanoes – are among the most densely populated on Earth. Java's rich volcanic soils support more than half of Indonesia's population. The island of Bali also has very fertile soils. The Balinese people have terraced the slopes of the island's volcanoes for thousands of years, resulting in some spectacular landscapes (see Source 5).

Source 5 Rice terraces in Bali

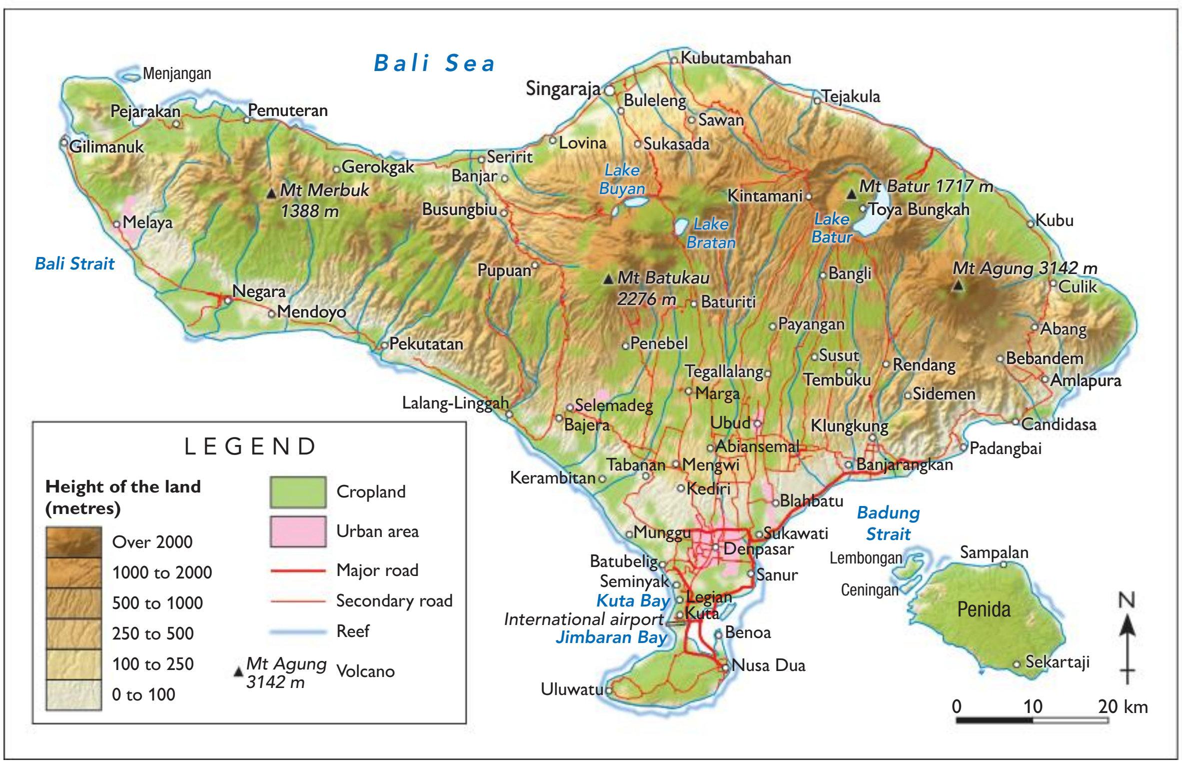
I used to think, now I think

Reflect on your learning about the dangers and benefits of volcanoes and complete the following sentences.

- I used to think ...
- Now I think ...

What has changed in your understanding?

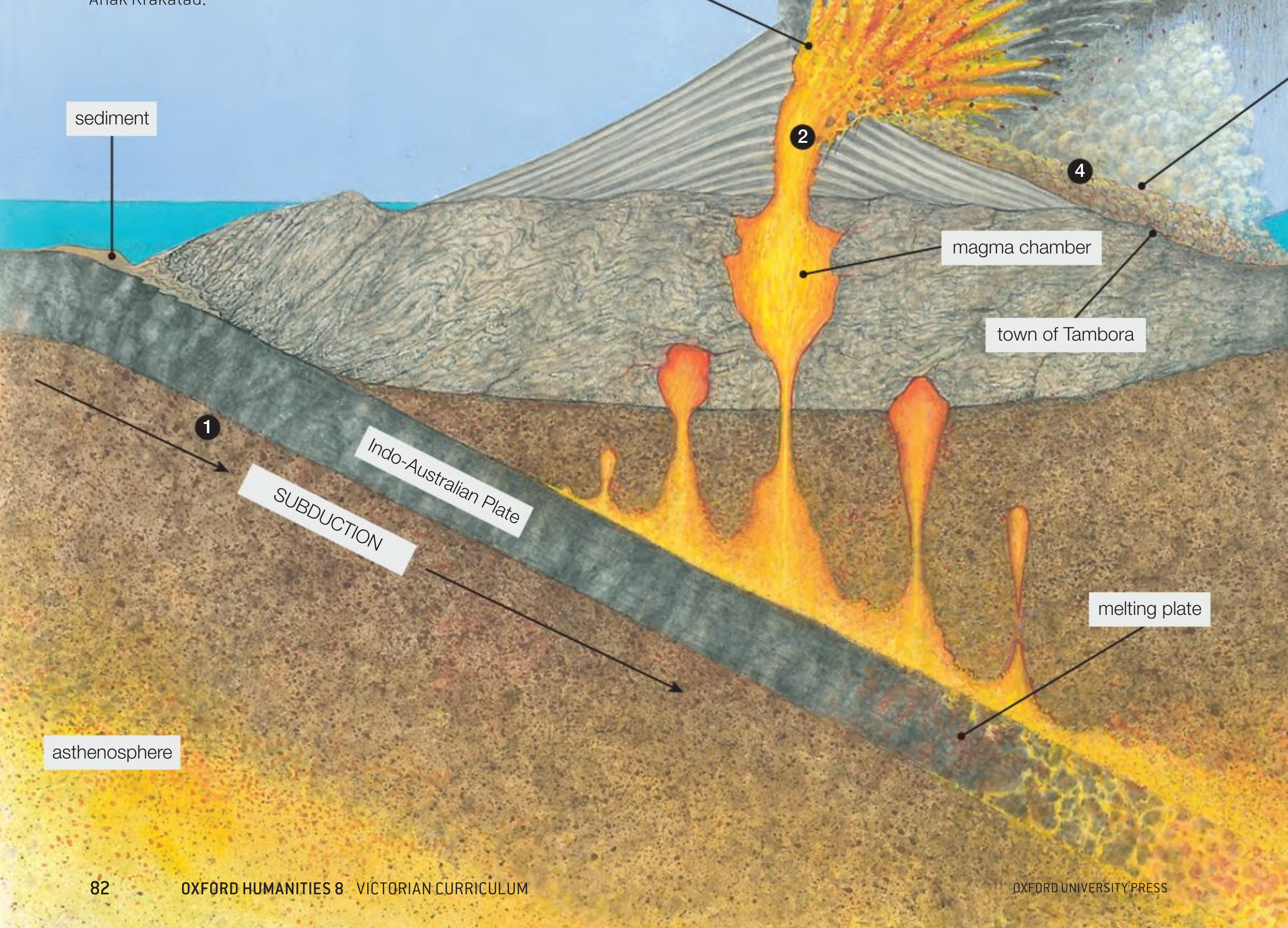
BALI



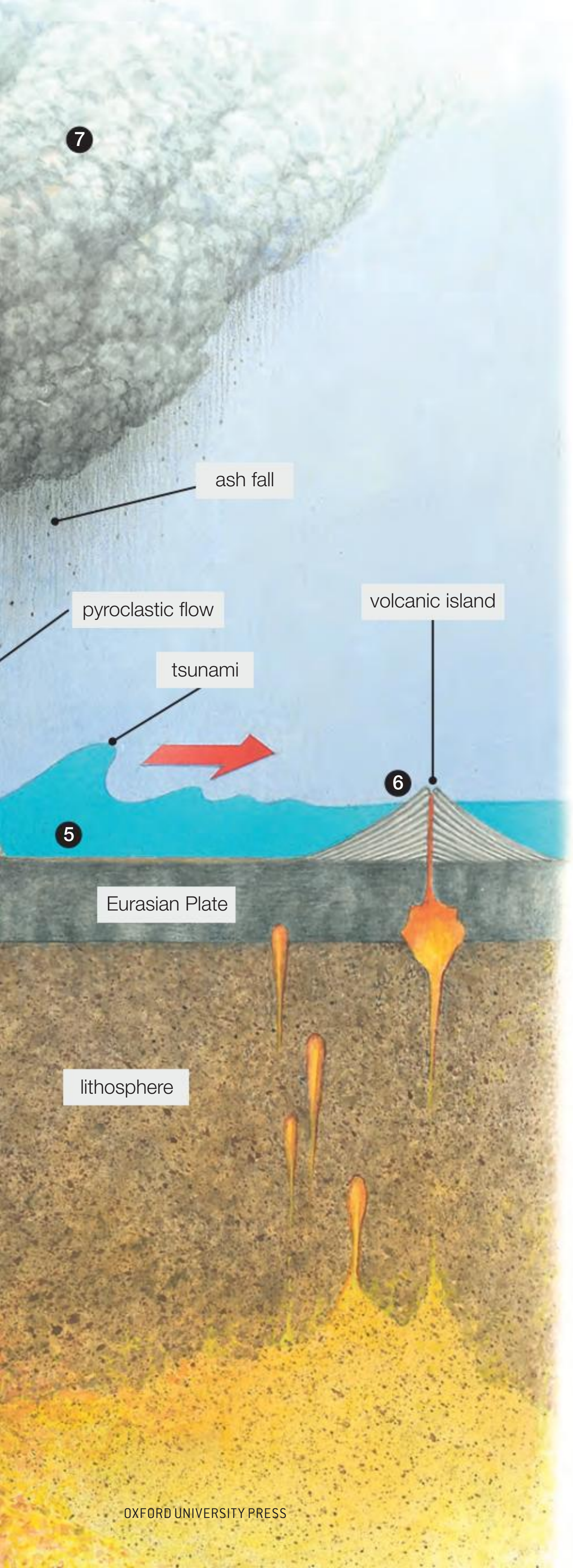
Source 6

Source: Oxford University Press

Source 7 This photograph shows a real example of an ash and gas cloud caused by a volcanic eruption. It was taken during the 2018 eruption of Anak Krakatau.



Source 8 The 1815 eruption of Mount Tambora



The steps in Mount Tambora's 1815 eruption

1. Driven by currents in the mantle, the Indo-Australian Plate subducts below the Eurasian Plate and melts.
2. Heat and friction cause a body of magma to rise to the surface and erupt. Much of the blast is sideways (horizontal).
3. The volcano collapses, losing 1200 metres of height.
4. A massive fast-flowing avalanche of mud, lava and ash (pyroclastic flow) hurtles down the mountain, burying the town of Tambora.
5. As the material tumbles into the sea, it creates a tsunami wave that travels at high speeds to distant, volcanic islands.
6. The tsunami swamps islands, killing 90 000 people.
7. The ash and gas cloud reaches 43 kilometres into the upper atmosphere.

3.9 CHECK YOUR LEARNING

Review and understand

1. **Identify** the features of the eruption of Mount Tambora that made it the deadliest of all time.
2. How have volcanoes impacted the landscape and people of Indonesia?

Apply and analyse

3. **Examine** Source 2 on page 57.
   a. **Explain** why the 'ring of fire' has its name and **identify** one country from each continent it surrounds.
   b. Using the PQE method (see page 26 of 'The geography toolkit'), describe the distribution of volcanoes around the world.
4. **Examine** Source 6 on page 81.
   a. How many volcanoes are there on the island of Bali?
   b. What evidence is there on this map that these volcanoes have helped to produce good soil for farming?
   c. Using the scale provided, calculate the distance from Mount Batukau to Mount Merbuk.

Evaluate and create

5. **Apply** your knowledge of volcanoes to write a paragraph using five terms shown in Source 8.
6. With a partner, **discuss** the link between volcanoes and population density in Indonesia, using Source 4. Share your answers with the class.
7. **Research** one of the other places on Earth where many people live near volcanoes, such as Italy, Mexico, Costa Rica and Honduras. What are the volcanic gifts in this place, and what are the dangers?

3.10 Landslides

In this topic, you will:

» identify the different types of landslides, and what causes them

» outline how humans respond to landslides, and prepare for them in the future.

Map it!
World: Landslides and other hazards

Landslides are one of the most common and dangerous types of hazard that affect mountain landscapes. The term 'landslide' is used to describe any type of large-scale movement of soil, mud, rocks or snow carried by the force of gravity downhill. The movement can be as slow as a few centimetres per year, or very rapid. Large, rapid landslides have the potential to destroy towns, roads and bridges, block rivers and take lives.

Landslides are often caused by a combination of natural processes and human factors. Natural factors include heavy rain, unstable slopes, an earthquake or volcanic eruption, and erosion by rivers or waves. The likelihood of a landslide happening is often increased by human activities, such as:

- deforestation
- road or mine construction that requires cutting into a slope
- leaking pipes
- vibrations caused by rock blasting or heavy traffic.

Preparing for landslides

People who live in areas prone to landslides should be aware of the dangers and develop an evacuation plan in case one occurs. Landslides are most likely to occur during heavy rainfall, in areas where debris flows and rock falls are common. They are also likely to occur during an eruption in an area prone to mudflows.

The best defence against a landslide is to reduce the chance of it occurring. While there will always be natural forces at play, humans can protect themselves against landslides by minimising their interference with sloped environments. This includes leaving hillsides forested and avoiding cutting into hillsides to create flat land for farming, roads or buildings.

As with many natural disasters, people in developing countries are most at risk of being negatively impacted by landslides. In such countries, buildings in mountainous areas are often poorly made, and hillsides are deforested to collect timber.

Source 9 A landslide has destroyed this road in Camiguin, in the Philippines.

Types of landslides

Five of the most common types of landslides are described below.

SOIL CREEP

Soil creep is the gradual movement of soil, rocks and earth down a gentle slope. This is the slowest-moving type of landslide and can take place over many years. As a result, it is often unnoticeable to people living in the area. Areas affected by soil creep can be identified by features such as leaning telegraph poles and fences, cracked walls and bowed trees.

SLUMPING

Slumping is the movement of larger sections of soil and rocks down a steep slope. These sections slip down the surface of the slope to different degrees, often creating several different levels (called scarps). Slumping is usually triggered by earthquakes, excessive rain, or freezing and thawing of the soil.

MUDFLOW

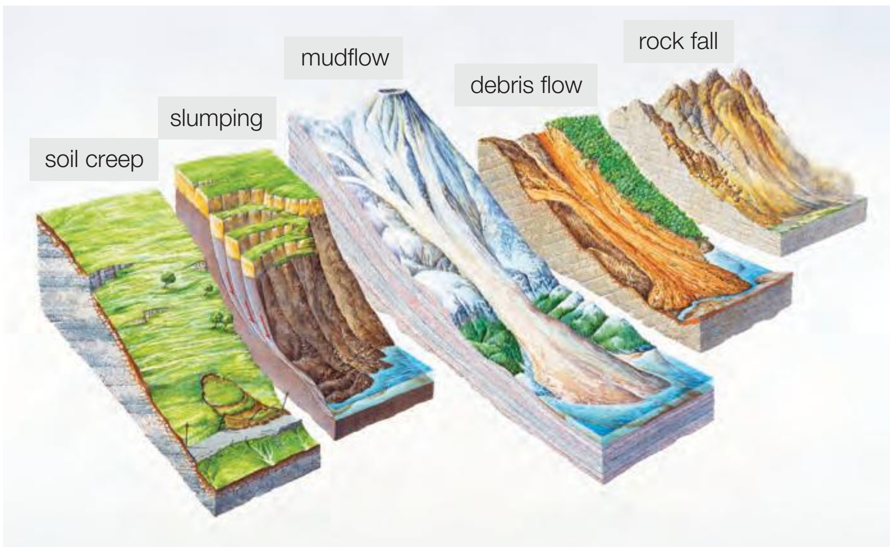
Mudflows are often triggered by heavy rain, quick-thawing earth, earthquakes or volcanic activity. For example, snow on the sides of active volcanoes melts quickly and combines with soil and rocks to create mud slurry that travels downhill. The mud can be up to 50 metres thick and can travel at speeds of up to 80 kilometres per hour, burying entire villages and killing many people.

DEBRIS FLOW

Debris flow is characterised by the sudden collapse of a slope. In Source 9, you can see how debris flow has been triggered by the removal of trees from the slope, which has exposed the soils to heavy rainfall.

ROCK FALL

Rock falls are usually triggered by heavy rain or earthquakes. Human activities, such as cutting into slopes to build roads, can greatly increase the likelihood of rock falls occurring.



Source 10 Types of landslides

3.10 CHECK YOUR LEARNING

Review and understand

1 **List** four human activities that can contribute to landslides.

2 **Outline** one way that people living in mountain communities can prepare for landslides.

Apply and analyse

3 **Examine** Source 9.

a Using Source 10, identify which type of landslide has occurred in this image.

b Write a paragraph analysing the human and natural causes of such a landslide. Remember, when you analyse something, you need to break it down into smaller parts and talk about how they relate to each other. In this case, think about which causes would have had the most impact on this type of landslide.

4 **Distinguish between** soil creep and mudflow. Remember, when you distinguish between two things, you should talk about how they are different.

Evaluate and create

5 Rank the five types of landslides from the one you consider to be the least dangerous to the one you consider to be the most dangerous. **Justify** (give reasons for) your ranking.

3.11 Landslides in Myanmar's jade mines

In this topic, you will:

- investigate landslides in northern Myanmar
- understand the impacts that these landslides have on the landscape and community.

Buried deep in the north of Myanmar is a great natural treasure: the jade mines of the Kachin Hills. These mines have produced some of the world's most valuable gems for over 250 years, including flawless jade stones that are worth as much as diamonds. A necklace made from Myanmar jade sold for more than $36 million in Hong Kong in 2014. The legal trade in jade in Myanmar generates more than $16 billion a year. Researchers estimate that the illegal trade may be worth double that sum.

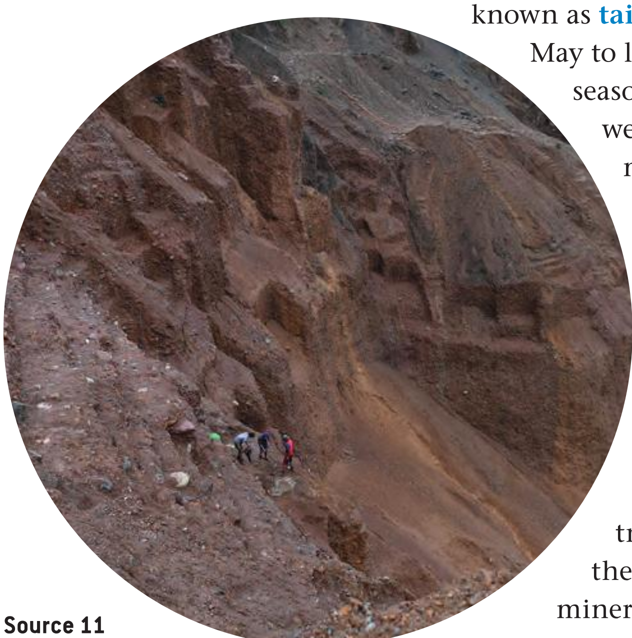
There is a growing demand for jade in China, and as a result the jade industry in Myanmar is booming. However, mining for jade is incredibly dangerous. Each year, miners are killed in landslides – the deadliest of which to date occurred in July 2020, when more than 174 miners were killed, with another 100 listed as missing.

Working conditions

Most miners working in the Kachin Hills are unregistered workers from poor families; these workers are known as 'pickers'. As a result, authorities do not have a precise number as to how many pickers are working in the mines at any given time.

tailings
rock waste from mines

Pickers work in very dangerous conditions, often digging with their bare hands in the piles of rock that tumble from the back of huge dump trucks. These piles, known as **tailings**, form large, unstable hills (see Source 11). From mid-May to late October each year, Myanmar experiences its monsoon season, where heavy rain falls throughout the country. The west coast in particular is prone to tropical cyclones. During monsoon season, heavy rainfall causes tailings to collapse as landslides. Tragically, this results in injury and death for the pickers digging in piles of rock for the precious jade.



Source 11
Pickers digging in tailings piles in the Kachin Hills of northern Myanmar

The July 2020 landslide

On 1 July 2020, heavy rains poured onto the Kachin Hills. Local authorities warned pickers that they should evacuate the area, but many ignored the warning. At 6.30 am, a tailings pile collapsed into a small lake. This triggered what survivors called an 'inland tsunami', as the water, mud and rock flooded the settlements where the miners lived.

As most pickers lived in shacks made with tarp, they were quickly swamped in the deadly wave. The heavy rain continued, toppling the unstable slopes and making rescue efforts extremely difficult. One witness told the BBC: 'Within a minute, all the people at the bottom [of the hill] just disappeared. I feel empty in my heart ... There were people stuck in the mud shouting for help, but no one could help them.'

Producers and consumers

Geographers are interested in the links between people in different places, and the impacts of these links. When it comes to jade, the link between Myanmar and China has existed for hundreds of years. A ‘jade road’ existed between Myanmar and China from the late 1700s to the mid 1900s, up until World War II. After that, much of the trade began taking place in Hong Kong.

Today, the pickers of Myanmar are linked to the jade consumers of China even though it is unlikely they will ever meet. While Chinese consumers are willing to pay a lot of money for the precious stones, their demand for jade has a serious impact on the working conditions in Myanmar’s mines. To cope with the long hours and hard labour, many pickers have turned to drug use, and as a result, in many camps there are high rates of HIV infection.

For more information on this key concept, see page 8 of ‘The geography toolkit’.

KEY CONCEPT
Interconnection

Source 12 Necklaces made from Myanmar jade

3.11 CHECK YOUR LEARNING

Review and understand

1 **Identify** the number of missing people after the 2020 landslide in Myanmar.

2 **Outline** the human activities and natural processes that contributed to the 2020 landslide.

3 **Outline** how the jade industry demonstrates the geographical concept of interconnection.

Apply and analyse

4 Using the world map in the back of your book, locate Myanmar. **Identify** three of the countries that border it.

5 Using Source 10 on page 85, **classify** the July 2020 landslide. Give reasons for your answer.

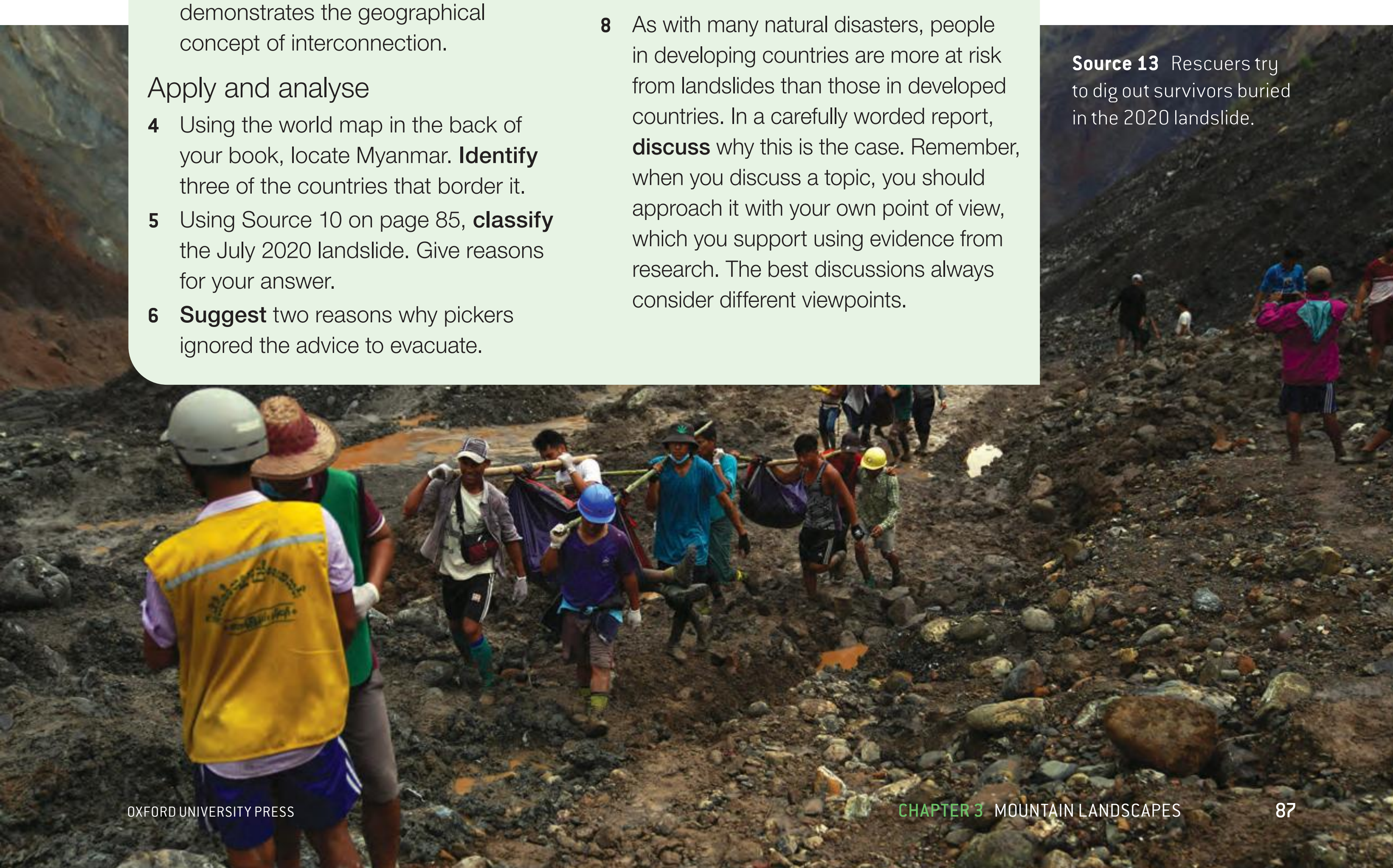
6 **Suggest** two reasons why pickers ignored the advice to evacuate.

7 In pairs, reflect on why pickers were vulnerable to this type of disaster.
   a Think about the geographical influences in the Kachin Hills.
   b Think about the social and economic situation of the pickers.

Evaluate and create

8 As with many natural disasters, people in developing countries are more at risk from landslides than those in developed countries. In a carefully worded report, **discuss** why this is the case. Remember, when you discuss a topic, you should approach it with your own point of view, which you support using evidence from research. The best discussions always consider different viewpoints.

Quiz me!
A quick quiz on landslides in Myanmar’s jade mines



Source 13 Rescuers try to dig out survivors buried in the 2020 landslide.

3C RICH TASK

Quizlet

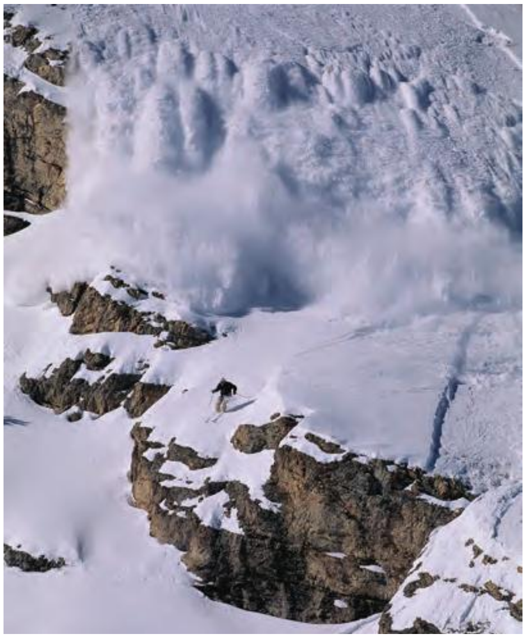
Revise the key terms you have learnt so far.

Avalanches

More than 150 people a year, mostly skiers and snowboarders, are killed by avalanches.

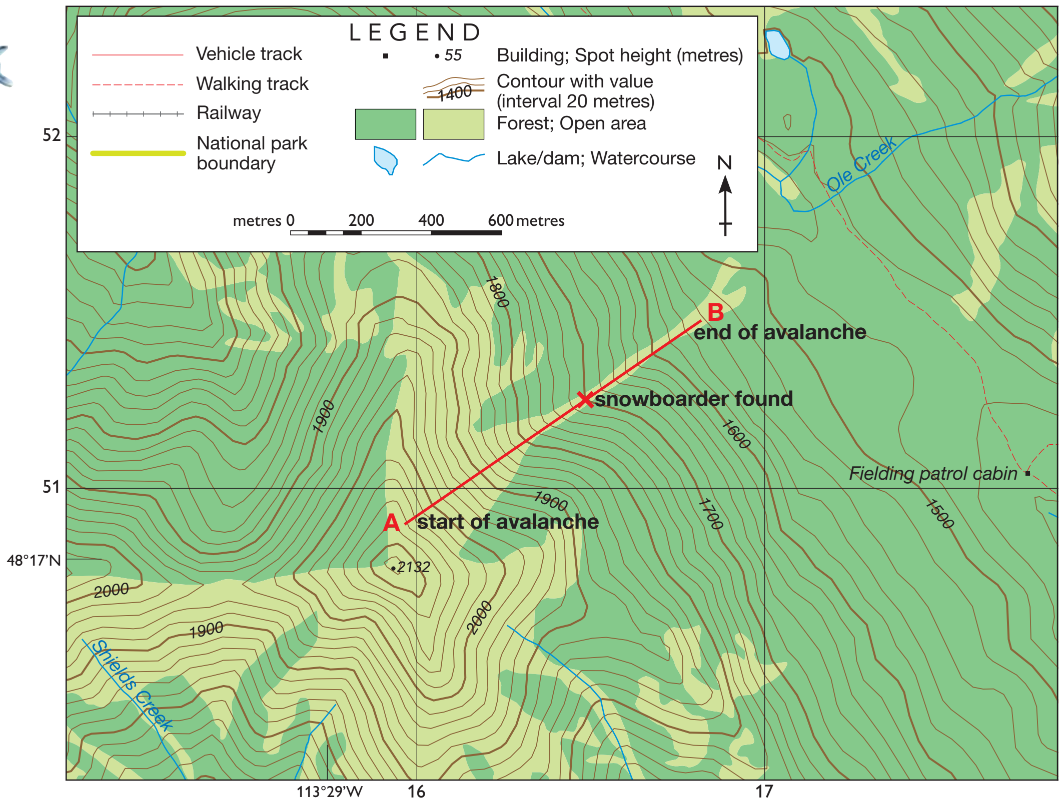
Avalanches are a type of landslide. They involve the rapid movement of snow down mountain slopes. Some steep slopes are more likely to produce an avalanche than others – snow resting on a layer of slippery ice on a steep slope can easily collapse. The resulting avalanche can reach speeds of up to 130 kilometres per hour.

In 2010, a lone snowboarder was killed by an avalanche in Glacier National Park in Montana in the United States. The site of the avalanche is shown in Source 15.



Source 14 A skier in the path of an avalanche

GLACIER NATIONAL PARK, MONTANA, UNITED STATES



Source 15 Glacier National Park was the site of an avalanche in 2010.

KEY SKILL
Collecting & representing data

Constructing a cross-section

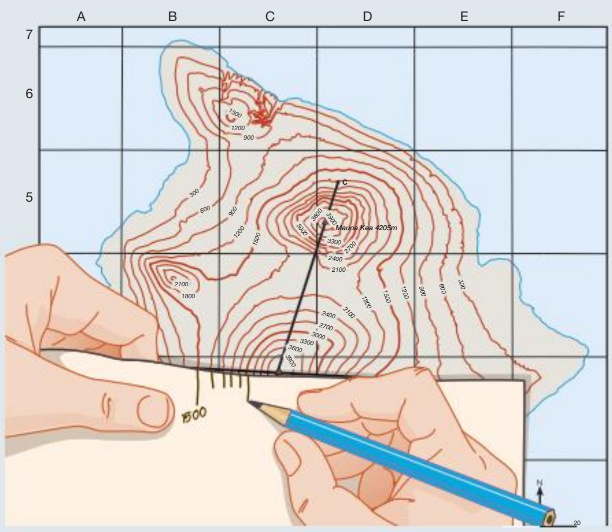
Cross-sections show the landscape as a view from the side. To construct a cross-section from a topographic map, such as Source 15, follow the steps outlined below.

Step 1 **Identify the cross-section:** Find the two points on the map that will form the outer edges of your cross-section. In the case of Source 15, these points are labelled A and B.

Step 2 **Mark the outer edges:** Place a straight-edged piece of paper across the map so that it crosses both points A and B. Mark these two points on your piece of paper. Be careful not to draw on the map.

Step 3 **Mark the contour lines:** Working from left to right, put a small mark on your piece of paper at every point where it crosses a contour line. You need to know the height of each line, so jot this down on the piece of paper as well (see Source 16).

Step 4 **Draw the axes:** On another piece of paper, draw a set of axes for your cross-section. The horizontal axis is the same width as the distance between points A and B on the map. The vertical scale must begin below the lowest height on your cross-section and extend above your highest point. Put a vertical scale on both the left-hand side and right-hand side of your cross-section.



Source 16 Marking the contour lines

Step 5 **Transfer the contour line heights:** Lay your first piece of paper along your horizontal axis. For each contour height shown, you must place a dot on your cross-section at the correct height according to your vertical scale.

Step 6 **Join the dots:** Join the points with a smooth line. Use a graphite pencil and take care to make your sketched line as 'natural' as possible. It should not be a series of short, straight lines, but one long, smooth, curved line.

Step 7 **Add the finishing touches:** Lightly shade the area below your line to show that this is solid land. Label both axes with their correct scales and give your cross-section a title.

For more information on this key skill, refer to page 28 of 'The geography toolkit'.

Practise the skill

1 **Construct** a cross-section of the avalanche site along the line marked A–B on Source 15.

Extend your understanding

1 Study Source 15. On this map, the beginning of the avalanche is labelled A and the point at which it stopped is B.

  a **Identify** the direction in which the avalanche travelled.

  b Using your cross-section as a guide, **describe** the steepness of the slope at this place.

2 Rangers at Glacier National Park monitor snow conditions carefully and sometimes close dangerous areas. What do you think they look for when they examine the snow conditions?

3 **Compare** this natural disaster to the landslide described on pages 86 to 87.

  a In what ways were these disasters similar?

  b In what ways were they different?

3 CHAPTER REVIEW

Review questions

3A How are mountain landscapes formed?

1 Why are there are no active volcanoes on the Australian mainland? (1 mark)

2 **Outline** how glaciers change mountain landscapes. (2 marks)

3 Mount Everest is the highest mountain in Asia, and Mount Kilimanjaro the highest in Africa. Everest is a fold mountain, whereas Kilimanjaro is a volcanic mountain.

a **Distinguish between** the formation processes of fold and volcanic mountains. Remember, when you distinguish between two things you should talk about how they are different. (4 marks)

b **Explain** why these different processes take place. (3 marks)

(Total: 10 marks)

3B How are mountain landscapes used and managed?

1 **Analyse** the strengths and weaknesses of terracing mountain landscapes to grow food. Remember, when you analyse something you should break it down into smaller parts and talk about how they relate to each other. (4 marks)

2 'We must protect our mountain landscapes. Without them, many lives would be threatened.' **Discuss** the arguments for and against this statement, and give your opinion. (6 marks)

(Total: 10 marks)

3C Are mountain landscapes hazardous places?

1 **Identify** one benefit brought about by volcanoes. (1 mark)

2 'Landslides are caused by a combination of factors.' **Explain** what this statement means, using an example of one specific landslide. (3 marks)

3 One of the ways to reduce the impacts of natural disasters is to avoid living in hazardous places. Is this a realistic strategy to avoid the impact of natural disasters? **Justify** (give reasons for) your answer. (6 marks)

(Total: 10 marks)

Review activity

Examine the sources and answer the questions that follow.

Disappearing glaciers

There are thousands of glaciers in the Andes Mountains of South America. They contain vital supplies of water for people in many parts of the continent. However, as temperatures rise, the glaciers are shrinking. This has the potential to change the lives of millions of people as water becomes scarce.

1 **Examine** Source 17.
- a **Identify** the type of geographical photograph shown here: ground-level or aerial. (1 mark)
- b **Describe** the change in the Upsala Glacier between 1928 and 2004. (2 marks)
- c Why are geographical photos useful tools? (2 marks)

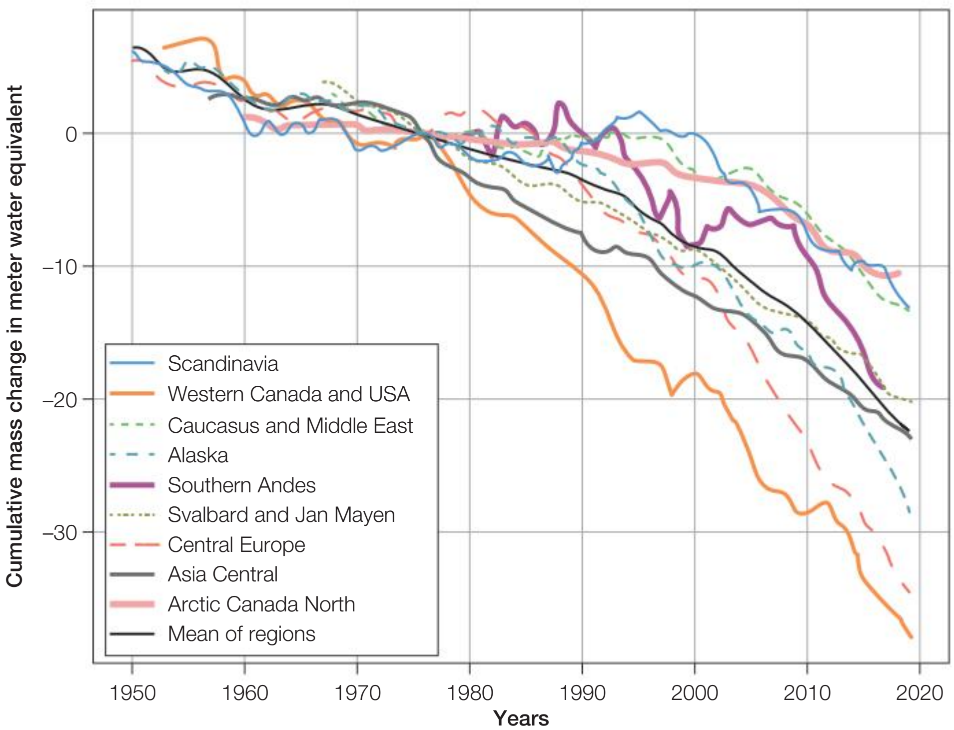
2 Using Source 18, **describe** the trend in the change in size of the world's glaciers since 1950. (2 marks)

3 **Determine** (decide) if the glaciers in the Southern Andes followed this same trend. Use evidence from both sources to support your answer. (3 marks)

4 Climate change is one of the major factors contributing to the change in the size of glaciers around the world. In a 200- to 300-word response:
- **define** the term 'glacial retreat'
- **explain** how glacial retreat impacts mountain landscapes
- **explain** the consequences of glacial retreat on different species (including humans)
- **propose** (put forward) ideas about what could be done to stop the effects of climate change on glaciers. (10 marks)

(Total: 20 marks)


Source 17 The Upsala Glacier in Argentina in 1928 (top) and 2004 (bottom)



Source 18 Change in the size of glaciers in selected regions from 1950 to 2019

Note: 'Cumulative mass change in meter water equivalent' refers to the change in the amount of ice on the glacier assuming that it had melted and become water.

Check your Student obook pro for these digital resources and more:

Student book questions
Chapter 3

Key skill worksheet
Communicating & reflecting: Chapter 3

Quizlet
Play a game of Quizlet on Mountain landscapes.

Chapter review quiz
Chapter 3

CHAPTER 4

Coastal landscapes

Coasts are very dynamic places – they are constantly changing. There is an ever-present battle between the forces that wear away the land, such as crashing waves, strong currents and winds, and the forces that build new landforms. These include tides, gentle waves and winds that shape the soft sands and hard rocks that make up coastal landscapes.

People, too, bring about changes to coastal landscapes. These changes range from small human activities, such as walking across a sand dune, to large activities, such as building ports and sea walls.

Increasingly, the coast is the place where change caused by climate change is most obvious. Rising seas mean that waves are breaking onto soft sand dunes and cliffs, wearing them away at a faster rate.

Source 1 Flagstaff Point lighthouse has kept watch over the Wollongong coast, south of Sydney, since 1936. In the centre of this dramatic coastal landscape, you can see waves attacking and eroding the hard rocks of the headland. To the left is Wollongong Beach, built of sand carried along the coast by waves and currents. On the right is a marina where rock walls have been built to protect boats from the waves of the Pacific Ocean.

4A
How are coastal landscapes formed?

4B
How are coastal landscapes used and managed?

4C
Are coastal landscapes hazardous places?

4.1 How coastal landscapes are formed

In this topic, you will:

- identify the processes that produce coastal landforms
- describe the power of waves and wind in creating coastal landforms.

Constant movements of water and wind carve coastal landscapes into an incredible range of shapes. Geographers, who refer to these shapes as landforms, are particularly interested in exploring the forces that create them. To begin your own investigation into coastal landscapes, you should start by finding out the names of the most common coastal landforms, shown in Source 1. Some of them you may have heard before, but others may be new to you.

Coastal landforms can be formed in two different ways – by **erosion** or by **deposition**. Because of these processes, there is no 'typical' or 'average' coastal landform: every **arch**, **stack**, **cave** or **headland** will be unique. There are, however, common features for each type of landform. Geographers examine and describe the similarities and differences of these features and use them to explain how they were formed. For example, Sources 3 and 4 show two coastal landforms. Geographers would describe both landforms as stacks, even though they look quite different.

erosion
the wearing away of land by wind, water or ice

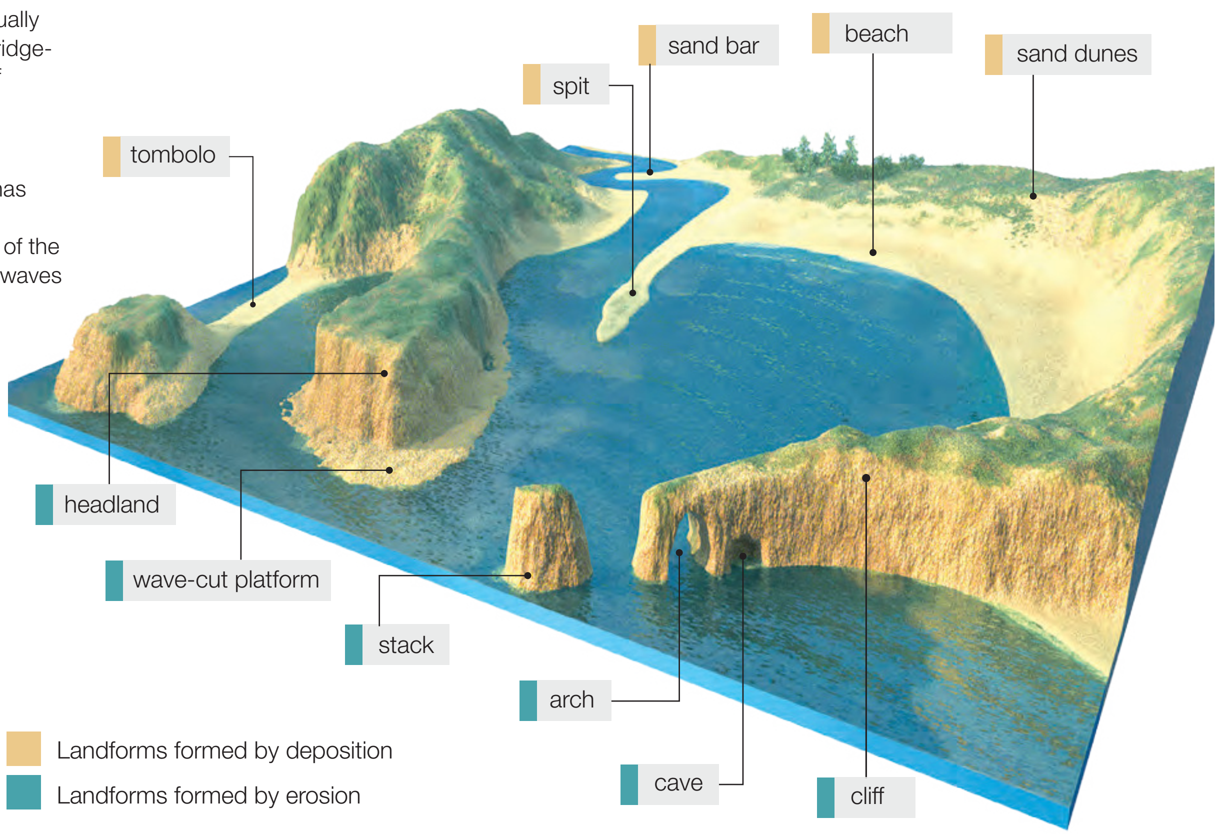
deposition
the building up of land through deposits of sand and other materials

arch
a natural feature, usually rock, that forms a bridge-like arc as a result of erosion

stack
a part of a cliff that has separated from the mainland as a result of the erosive effect of the waves

cave
a hollow space along the coast produced by the action of waves

headland
a piece of land jutting out into the sea



Source 1 Some common coastal landforms

Source 2 Whitehaven Beach on Queensland's Whitsunday Islands is often voted the world's most beautiful beach.

Key skill worksheet
Asking questions & conducting research: Developing geographical inquiry questions about the coast

KEY CONCEPT
Change

A day at the beach

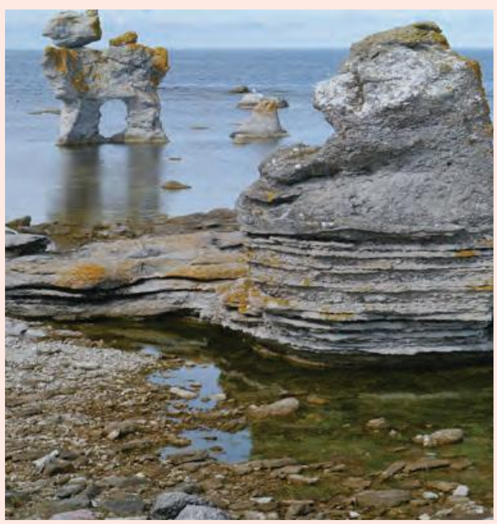
Like all landscapes, coasts are constantly changing. During a five-hour visit to a beach, about 2500 waves hit the shore. Each wave picks up millions of grains of sand and moves them. Some grains are moved further inland, some along the beach, some out to sea, and some are put back in the same place. The wind also picks up millions of grains of dry sand and blows them onto the sand dunes, which are hills or mounds of sand formed by wind deposition on the landward side of a beach. People walk through the dunes, trampling the plants and creating a wind tunnel that speeds up erosion. During the day, the sea level rises and falls about 2 metres, as the Moon's gravity pulls the oceans towards shore and away from it, creating tides.

What makes a beach perfect for geographers to study is the rapid rate of change that takes place there. This is mainly because:

- one wave breaks on the beach about every 8–10 seconds, and each of them changes the coast
- sand is easily eroded and deposited
- people use the coast in many ways, constantly changing it.

For more information on this key concept, refer to page 10 of 'The geography toolkit.'

Source 3 Stacks at Port Campbell, Victoria



Source 4 Stacks at Faro Island, Sweden

The power of waves

destructive waves
strong waves that wear away coasts and remove material

constructive waves
gentle waves that deposit material and build up beaches

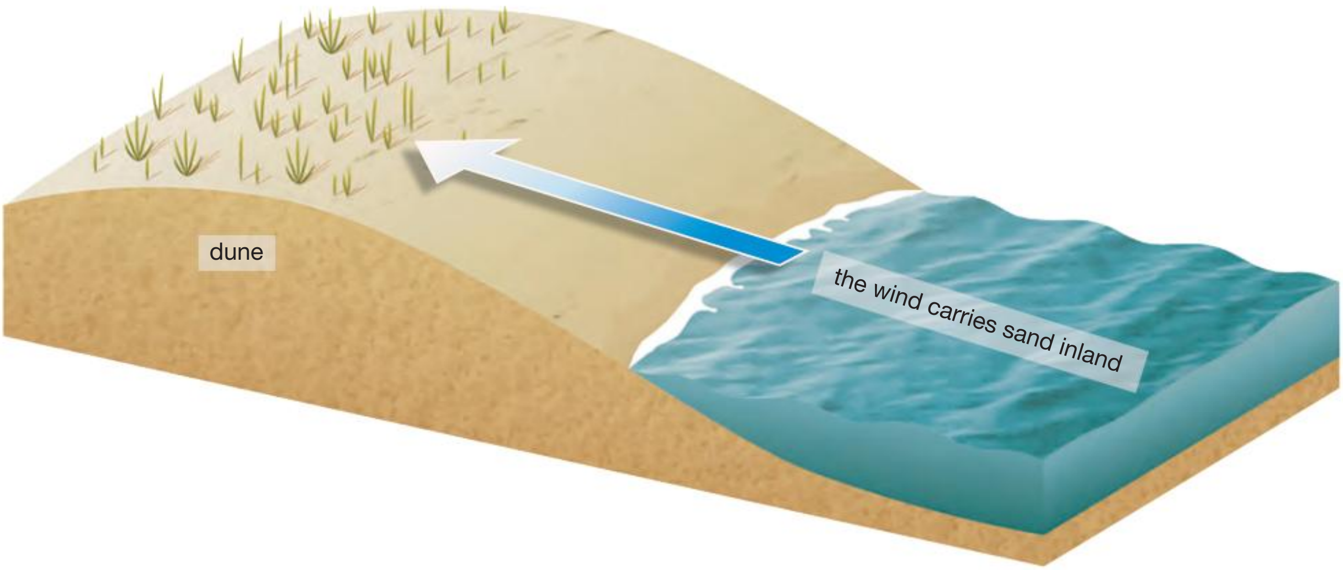
Waves are the main force that shape coastal landscapes. They form as wind blows across the surface of the water, and their energy builds as the wind continues to blow them towards the coastline. This energy is then released as the wave breaks on the coast.

In places where the waves have travelled large distances or have been pushed by powerful winds, they can break with great force on the coast. These **destructive waves** break rocks apart and smash them into fine pieces of sand. By contrast, waves that have only travelled a short distance, such as in a bay, break with much less force. These **constructive waves** carry sand up onto the coast where it gathers in piles.

Source 5 The difference between constructive waves and destructive waves can be seen on the Mornington Peninsula near Melbourne. On the right-hand side of this photograph is the Southern Ocean. Waves generated on this side of the peninsula have travelled thousands of kilometres and are large, destructive waves. On the left-hand side of the photograph is Port Phillip Bay. As a bay, it has produced much smaller, constructive waves.

The power of the wind

The other important force that shapes the coast is wind. Waves themselves are created by wind. Wind picks up sand and moves it inland, away from the waves (see Source 6). Over time, this wind-blown sand collects in large piles or dunes. As plants grow on the dunes, they become more permanent landforms and a feature of many coastal landscapes. In some places, the wind-blown sand acts like sandpaper – eroding rocks and carving them into remarkable shapes.



Source 6 The wind is a creative force that helps shape the coast.

4.1 CHECK YOUR LEARNING

Review and understand

1 **Identify** the two competing forces that shape coastal landscapes.

2 **Outline** how wind shapes coastal landforms.

Apply and analyse

3 Think carefully about the important role that waves play in shaping the coast.
   - a Why are some waves more powerful than others?
   - b How does the size and force of the wave affect its impact on the coastline?

4 Look at Source 1 in the opening of this chapter (pages 92 to 93). **List** four landforms created by erosion and four created by deposition.

5 Examine Source 1 on page 94.
   - a **Describe** what each of these landforms look like: arch, spit and tombolo.
   - b **Suggest** how each of these has been formed.

6 **Describe** the differences between the two sides of the peninsula in Source 5.

Evaluate and create

7 **Compare** the stacks in Sources 3 and 4:
   - a **Describe** how they look different to each other.
   - b In pairs, generate three geographical questions you would ask to explore why these stacks are different.
   - c **Research** these stacks to answer your questions from part b.

4.2 Erosional landforms

In this topic, you will:

» describe the process of erosion, and explain how it creates coastal landforms.

I used to think, now I think

Reflect on your learning about how coastal landforms are created and complete the following sentences.

- I used to think ...
- Now I think ...

What has changed in your understanding?

As we saw in topic 4.1, coastal landforms are created in two main ways: erosion and deposition. This is due to the fact that when waves hit the shoreline, their effects can be varied.

Destructive waves are those that erode and destroy sections of coast. Such waves are tall and frequent, which means they crash into the shoreline, digging out large chunks of land and eroding the coast.

Destructive waves usually begin in a large, stormy ocean. The waves travel thousands of kilometres, building up energy that is unleashed onto the rocks and sands of the coast. These waves carve the coastline into amazing shapes, in much the same way that a sculptor carves shapes from a piece of marble. This process of wearing away is known as erosion, and therefore the landforms created this way are called erosional landforms.

A stretch of coastline close to the town of Port Campbell in southern Victoria provides a good example of erosional landforms (see Source 7). The coastline is made up of limestone, which is a relatively soft rock. This part of Australia's coast is constantly being battered by destructive waves from the Southern Ocean. As a result, the limestone cliffs in the area are being slowly eroded, creating an ever-changing coast.

1 Cliff

Cliffs along coasts are formed by the action of waves on rock. The power of the waves erodes softer rock, leaving the more durable rock behind.

2 Blowhole

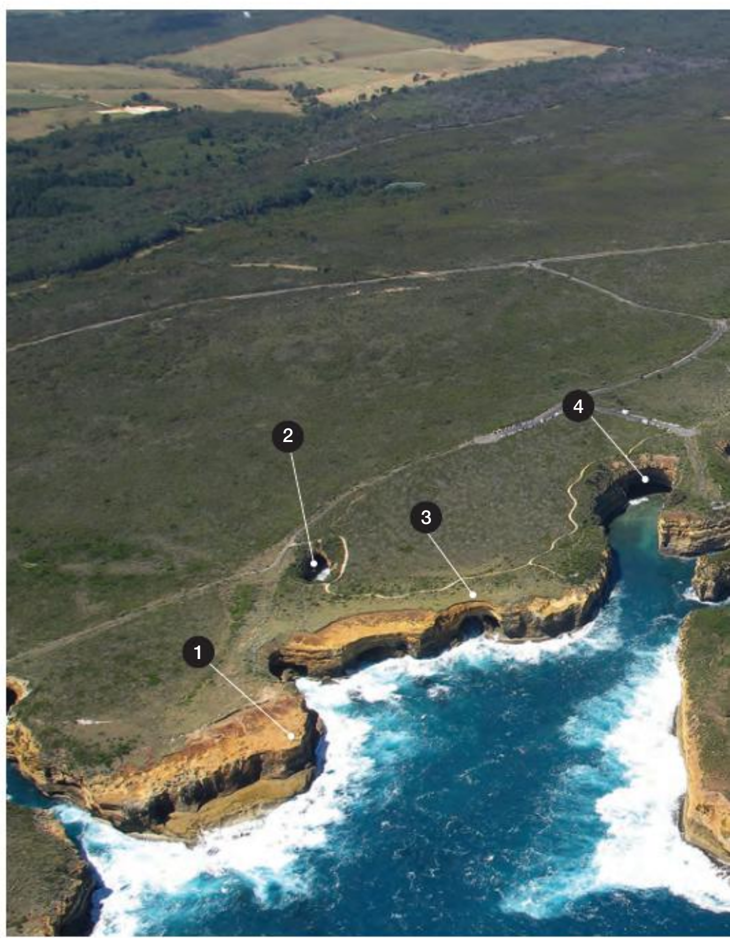
Waves entering a cave have eroded the back of the cave, causing it to collapse.

3 Cave

As waves approach the coast they tend to bend around headlands and islands and attack them from the side in a process known as **refraction**. When waves encounter a weak spot in the cliff (such as a section of soft limestone) they wear away the rock. They create a small opening, which is soon enlarged into a cave. The waves can now enter the cave and erode the sides and top.

4 Gorge

Some caves can be hundreds of metres long. Waves entering long caves can wear away the roof, causing it to collapse and forming a deep gorge.



Source 7 A section of coastline near the town of Port Campbell in Victoria

refraction
the process by which the direction of a wave is changed when moving into shallow water

Photo for sketching
The coastline near Port Campbell

Watch it!
A video and quiz on erosional landforms

4.2 CHECK YOUR LEARNING

Review and understand

1 **Identify** two features of the Port Campbell coast that make it vulnerable to erosion.

2 **Outline** how an arch becomes a stack.

Apply and analyse

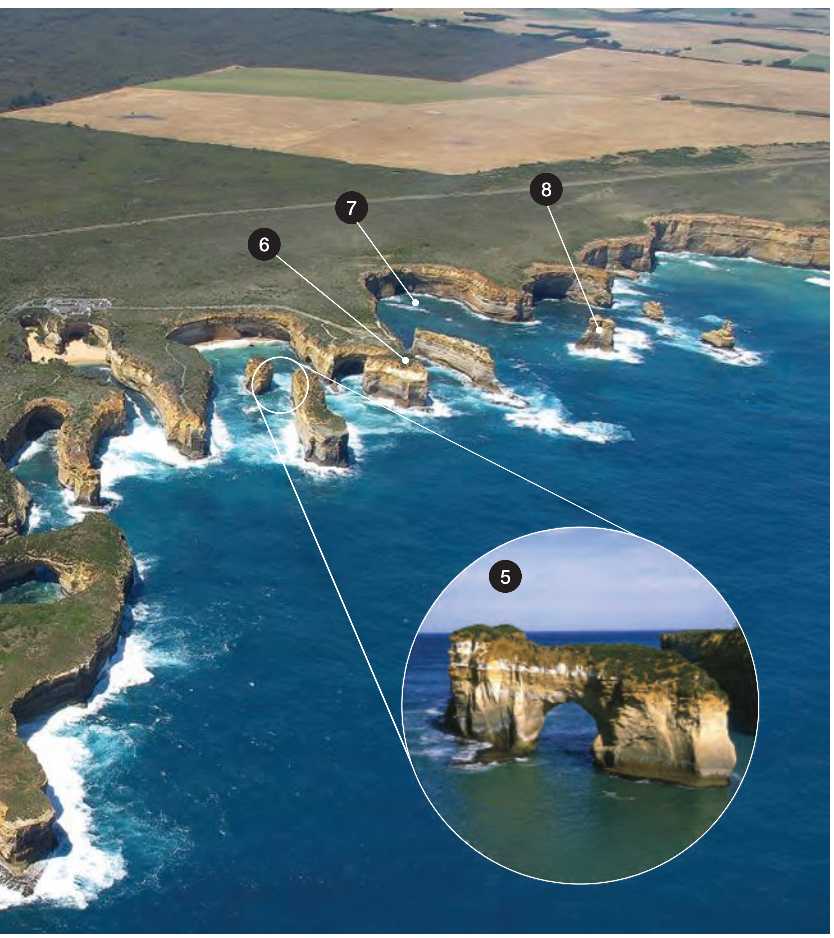
3 **Examine** Source 7.
   - a How many caves, arches and stacks can you identify?
   - b Describe the waves in this landscape. What evidence is there that they are destructive waves?

4 **Distinguish between** a bay and a headland. Remember, when you distinguish between two things, you should talk about how they are different.

Evaluate and create

5 **Predict** what changes might occur in the next few thousand years in the landscape shown in Source 7 by following these instructions: On a drawing or copy of the photograph (available on obook pro), sketch and label the following features of a future landscape:
   - a collapsed stack
   - a new arch
   - a new stack
   - the shape of the new coastline
   - a new gorge.

6 This coastline is moving inland at the rate of about 2 centimetres a year. The Great Ocean Road, which you can see in the background, is about 200 metres from the coast at present.
   - a Based on this information, estimate what year you think the Great Ocean Road will fall into the sea.
   - b Brainstorm a list of other features of the human environment in this region that you think might also change by then.



5 Arch
As waves erode the back of a cave they may penetrate right through the headland and produce an arch. Waves may pass through the arch, eroding the sides and top. The arch shown here (inset) has since eroded and fallen into the sea, creating two stacks (main image).

6 Headland
Some sections of the coastline are made up of harder rock than other sections. These can resist the energy of the destructive waves longer than the softer parts and remain as headlands – high, rocky outcrops of land.

7 Bay
The softer parts of a coastline wear away more quickly than headlands and become bays.

8 Stack
As the soft rock of arches is eroded by the destructive waves, the rock above the arches eventually falls into the sea leaving behind stacks – vertical columns – of rock.

4.3 Depositional landforms

In this topic, you will:

» describe the process of deposition, and explain how it creates costal landforms.

Coasts that are shaped by smaller, constructive waves are quite different from those shaped by destructive waves. Over time, smaller waves carry sand along the coast, and wind carries it inland. This sand and other material is deposited up onto the coast. The process is called deposition. It shapes the coast and creates distinctive depositional landforms, including beaches, dunes, spits, lagoons and tombolos.

Longshore drift

Although some waves hit the shoreline directly, most do so at an angle. From there, they pick up the sand and carry it along the beach, rather than just dumping it directly forward onto the shore. The next wave that comes along will also move the sand along the beach until eventually, after hundreds of small zigzags, millions of grains of sand are moved to one end of the beach. This movement of sand along a coast is called **longshore drift**. It is a major contributor to the shape of the coastline.

longshore drift
the process that moves sediment in a zigzag pattern along a beach by the wash and backwash of waves approaching the shore at an angle

Beaches and dunes

The most common depositional landforms are beaches. A beach is formed when constructive waves carry sand, pebbles and broken shells and deposit them on the shore (see Source 8). These small waves do not have enough energy to take this material back to sea, so it remains as a beach. Storms may bring destructive waves several times a year and wash away parts of the beach, but the slow, gradual process of beach building repairs this damage.

As the tide goes out, the sand dries out. The wind can then pick up individual grains and blow them inland. As the grains move, they may become trapped by plants or collected in areas sheltered from the wind. These collections of sand pile high, forming sand dunes. Plants grow on these dunes and hold them together. But if the plants are removed, entire dunes can move further inland, covering roads, car parks, paddocks and plants. These are called **blowout dunes**.

blowout dunes
horseshoe-shaped disturbances in a sand dune system

Source 8 The formation of beaches and dunes

Other coastal landforms

Longshore drift also moves sand *along* the coast. As sand is deposited along coasts, other landforms can be created by the forces of water and wind. These include spits, lagoons and tombolos.

Spits

A spit is a long, curved landform that is created from the build-up of eroded material at the mouth of a river, where it enters the sea. A river carries soil and rocks from upstream in its swiftly moving water. This material is dumped at the river mouth, forming a spit. Over time, the spit stabilises as plants grow on top of it and hold it together.

Quiz me!
A quick quiz on depositional landforms

Lagoons

Some spits grow so large that a river may be forced to change its course to reach the sea. Over thousands of years, the river mouth may move hundreds of metres along the coast and a stretch of calm, shallow water behind the spit, known as a lagoon, is formed. Lagoons are therefore partly or completely separated from the sea by a narrow strip of land.

Tombolos

A tombolo is formed when constructive waves deposit sand or other sediment between an island and the mainland (or another island). Eventually, enough material builds up that a permanent connection, or tombolo, is made between the island and the mainland.

Source 9 The formation of spits and a tombolo at Port Stephens, New South Wales

4.3 CHECK YOUR LEARNING

Review and understand

1 In your own words, **describe** how smaller waves shape the coast.

2 **Outline** how longshore drift shapes coastlines.

Apply and analyse

3 **Distinguish between** constructive waves and destructive waves. Remember, when you distinguish between two things, you should talk about how they are different.

4 How many spits can you identify in Source 9? Now, **explain** how spits form.

5 **Explain** the important role that plants play in constructive coastlines.

Evaluate and create

6 **Compare** the beach in Source 8 with Wollongong Beach, as shown in Source 1 in the opening of this chapter (pages 92 to 93). In what ways are these beaches the same and in what ways are they different?

7 Using the internet, locate an oblique photograph of a beach. Using what you have learnt so far, label and annotate as many features of the coastline as you can see.

4.4 Coastal landforms of the world

In this topic, you will:

- identify and describe the features of Australia's Bunda and Baxter Cliffs and the White Cliffs of Dover in the United Kingdom.

Geographers study landforms in different parts of the world to learn more about how they are formed. By examining the same type of landform in two different locations on the Earth, geographers can learn a great deal more about the forces that shape them, including the climate, geology, and forces of erosion.

In the case studies below, we will do as geographers do and compare the same type of landform in two different areas on the Earth.

CASE STUDY

The Bunda and Baxter Cliffs – the edge of the world?

A remarkable coastal landscape can be found along Australia's southern edge. The Bunda and Baxter Cliffs stand nearly 100 metres high, facing into the rough waters of the Southern Ocean. The cliffs are part of the Great Southern Scarp, which is 820 kilometres long. Geographers believe it is probably the world's longest unbroken cliff line.

As this region receives little rainfall, there is very little erosion at the top of the cliffs from streams and rivers. By contrast, powerful, destructive waves crash against the limestone at the base of the cliffs. These waves cause dramatic rock collapses, which keep the cliff face steep. Each year, the base of the cliff is cut back by about 30 millimetres by the power of these destructive waves.

The limestones that form the cliffs are made up of the compressed fossils from millions of tiny marine organisms that lived and died in an ancient shallow sea. As the Australian continent changed over time, it tilted and heaved these southern limestones out of the sea and formed the 820-kilometre-long coastal cliffs that we see today. Later, another smaller tectonic movement lifted parts of the seabed just a little, forming sections of low coastal plains along the scarp.

Today, two sections of the Great Southern Scarp look out over low coastal plains, while the rest is made up of spectacular coastal cliffs. The area is also famous for caves and marsupial fossils.

Source 10 The Bunda and Baxter Cliffs are part of the Great Southern Scarp, the longest cliff line in the world.

CASE STUDY

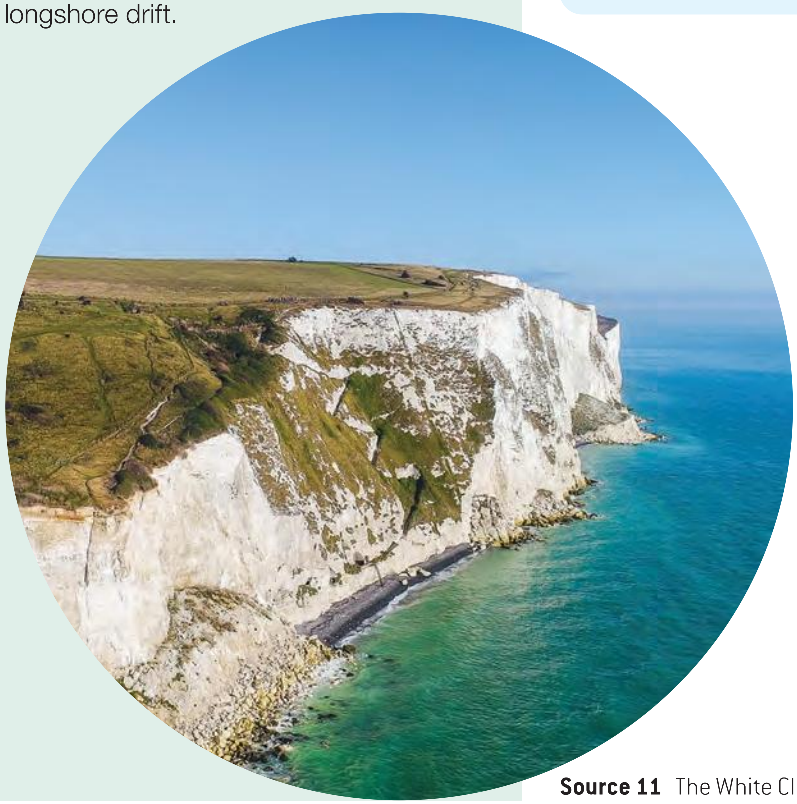
The White Cliffs of Dover

On the south-east coast of England, facing towards France, are the famous White Cliffs of Dover. The cliffs are more than 100 metres high, and stretch for 13 kilometres along the coast of the English Channel.

Their formation began around 70 million years ago, when Britain and a great deal of Europe lay beneath the sea. Over the course of millions of years, white mud and the skeletons of tiny algae collected on the seabed, to a depth of 500 metres. As they became compressed, these deposits formed chalk. Gradually, tectonic movements lifted much of Britain and Europe above sea level, forming many of Europe's mountain ranges. Glaciers then carved the mountains and eroded away the land between Britain and mainland Europe.

The White Cliffs of Dover are now being eroded slowly by the waves of the English Channel from below and the rain from above. For thousands of years, the cliffs have only retreated 5 centimetres per year. However, this rate has increased dramatically in the past 150 years, with the cliffs now being eroded at a rate of around 30 centimetres per year. Scientists believe this increase has been caused by two factors: first, the changing climate has caused larger, more aggressive waves; and second, sand has been removed from the base of the cliffs in an attempt to control longshore drift.

Explore it!
A virtual field trip to the White Cliffs of Dover



Source 11 The White Cliffs of Dover

4.4 CHECK YOUR LEARNING

Review and understand

1 What is the name of the coastal process that forms cliffs?

2 **Identify** two reasons why the Bunda and Baxter Cliffs are iconic places.

Apply and analyse

3 Compare Sources 10 and 11 by answering the following questions.

   a **List** the ways in which these two landforms appear similar, and the ways they appear different.

   b **Explain** why these landforms are similar.

   c **Explain** why these landforms are different.

4 **Summarise** why the rate of erosion has changed at the White Cliffs of Dover.

Evaluate and create

5 In pairs, sketch the two landforms. Use labels to show the following features:

- layers of rock
- waves
- evidence of erosion.

4A RICH TASK

Quizlet
Revise the key terms you have learnt so far.

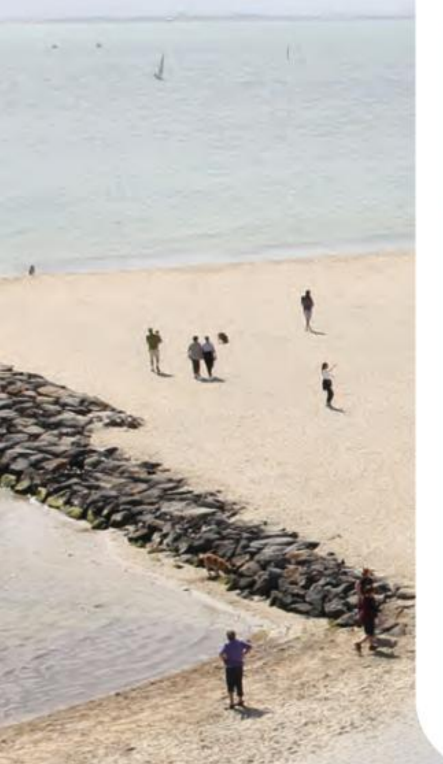
Hampton Beach

Hampton Beach is located in Melbourne, 14 kilometres south of the Central Business District. Like many beaches on Port Phillip Bay, it is struggling to hold onto its sand.

A series of decisions made over the past 100 years have gradually robbed the beach of its sand. These include building a wall between the beach and the low cliffs behind it, and constructing a marina at one end of the beach. Both of these strategies have stopped sand moved by longshore drift from being deposited on the beach.

There have also been many attempts to repair the beach. Most notable of these has been the building of a series of rock walls that jut out into the bay and trap sand moving along the shore. Sand has also been pumped from the bay onto the beach.

Source 12 The fieldwork site at Hampton Beach



KEY SKILL
Conducting fieldwork

Measuring longshore drift

The coast is a popular place for geography field trips because it is possible to see and measure many of the changes that are taking place there. There are several ways to measure the forces responsible for longshore drift. You will need some equipment to do this, and you will need to record your findings to process the data back in the classroom and present your findings.

Step 1 **Measuring wind direction:** Stand on the beach. In which direction is the wind blowing? You may need to pick up and drop a few grains of dry sand to help you find out.

Source 13 There are many free compass apps you can install on your phone.

Use a magnetic compass or a compass app to determine the wind direction. Draw a line in the sand showing this direction.

Step 2 **Measuring wind speed:** The device for measuring wind speed is called an anemometer. Your school's sports department may have one. Set up the anemometer and take regular readings of the wind speed every 5 minutes over a 20-minute period. This will allow you to work out the average wind speed.

Step 3 **Measuring longshore drift:** Measure and mark out a set distance of 10 metres on the beach near the water's edge. Stand at the upwind end of your marked-out area and throw a tennis ball into the water from that point. Record the time taken in seconds for the ball to move 10 metres along the coast. Divide this number by 10 to find out the rate of longshore drift in metres per second. Try this at a few different places along the beach and a few different distances from the shoreline to work out the average speed of longshore drift. Use your compass to work out the direction of this drift.

For more information on this key skill, refer to page 14 of 'The geography toolkit'.

Source 14 An anemometer

Practise the skill

1 **List** the equipment you would need to complete the fieldwork activities described.

2 **Explain** why measuring wind direction is important in understanding longshore drift.

3 Source 15 shows a student's notes from a field trip to Hampton Beach. Read them carefully and then answer these questions.

   a **Calculate** the average wind speed by adding together all the recorded speeds and dividing the total by four.

   b **Describe** the other evidence provided that tells you it was windy on the day of the field trip.

   c **Calculate** the average rate of longshore drift. Add together the five observations and then divide the total by five.

   d Why was the sand moving southwards on the day of the field trip?

   e What type of data has been collected? How reliable is it?

Extend your understanding

1 Work with your teacher and geography class to plan a fieldwork trip to another coastal area in Melbourne.

Year 8 Fieldwork: Hampton Beach

Date: *9 August 2021*

Location: *Hampton Beach, Port Phillip Bay*

Weather: *Cloudy and windy*

Waves: *Small choppy waves, about 40 cm high*

Wind Direction: *Northwesterly*

Wind speed observation

Time	Wind speed
10.00	*18 km/hr*
10.15	*16 km/hr*
10.30	*23 km/hr*
10.45	*21 km/hr*

Longshore drift observation

Test no.	Approximate distance from shore line	Time (in seconds) taken to travel 10 metres
1	*5 metres*	*182*
2	*4 metres*	*140*
3	*12 metres*	*228*
4	*20 metres*	*425*
5	*10 metres*	*212*

Direction of movement: *Southwards*

Evidence of sand movement: *There was a lot of sand built up on the north side of the groynes but hardly any on the south side. I think this is because sand gets trapped by the groynes. There was also sand being blown along the beach. I could feel this on my legs, and my bag that I left on the beach for about 10 minutes had a lot of sand on it.*

Source 15 Student fieldwork recorded at Hampton Beach

4.5 The many uses of coastal landscapes

In this topic, you will:

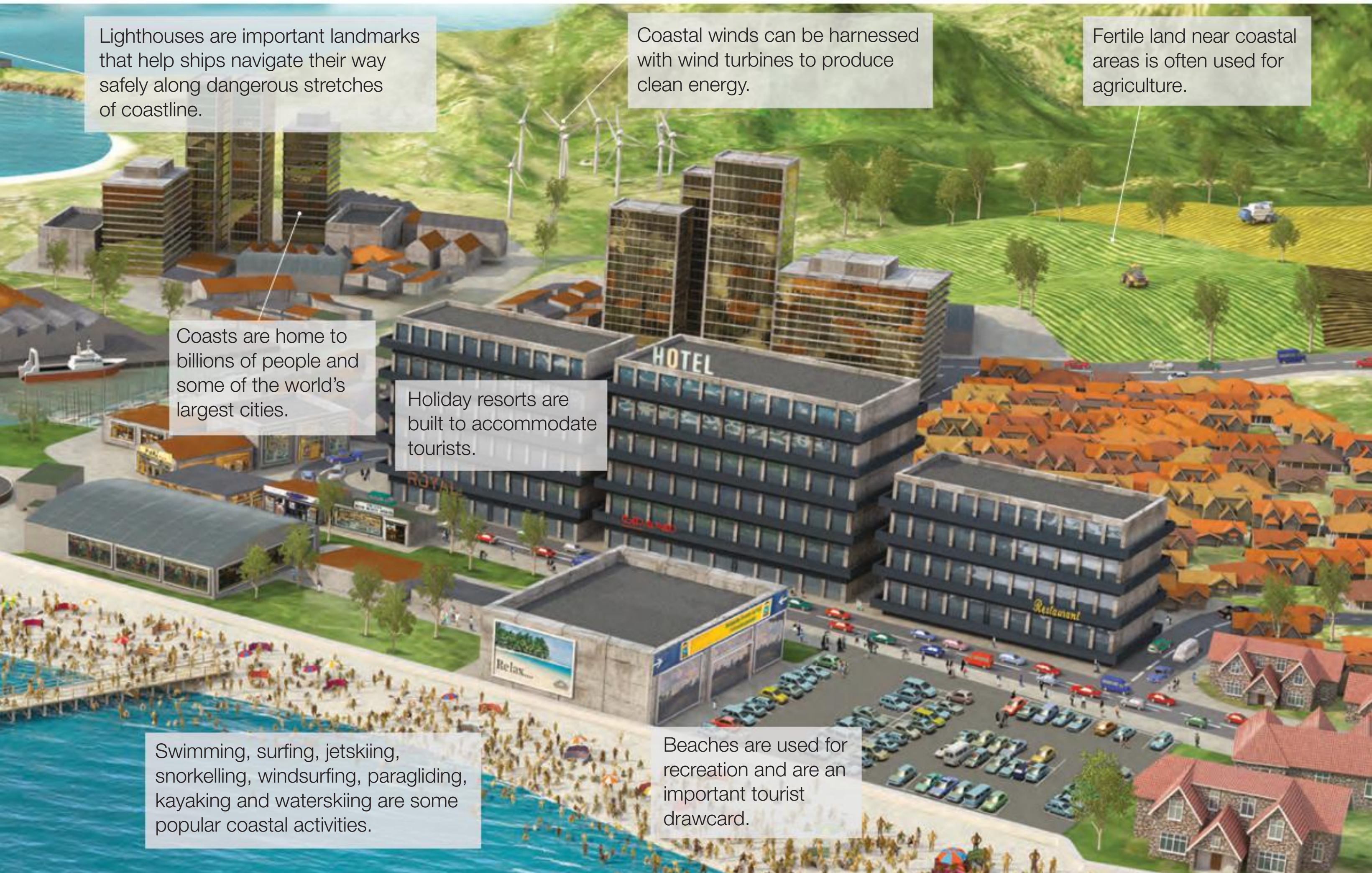
» explore the many ways in which coastal landscapes can be used.

Coastal landscapes are some of the most highly populated areas on Earth. About half of the world's population live on or near a coast. Some geographers estimate that this number will double over the next 15 years.

In Australia, this figure is already much higher – 85 per cent of us live within 50 kilometres of the sea. Many coastal towns and cities are currently experiencing rapid population growth, increasing this figure even more.

As shown in Source 1, coastal areas are used for much more than places to live. Some of these uses of coastal landscapes conflict with each other. This means that one use may cause problems for another area. On the other hand, some uses complement each other – they can both occur without causing problems for each other. Some uses of the coast have little or no impact on the natural environment, while others can have a significant impact.

Source 1 How and why people use coastlines



4.5 CHECK YOUR LEARNING

Review and understand

1 **List** three ways that people use coastlines.

Apply and analyse

2 **Suggest** two reasons why coasts are among the most popular places to live.

3 **Explain** the impact of tourism on coastal places.

4 **Examine** Source 1 and list:
- an example of a social resource
- an example of an economic resource
- an example of a recreational resource.

5 **Distinguish between** the use of the coastal area in the top left-hand corner of Source 1, and the bottom right-hand corner. Remember, when you distinguish between two things, you should talk about how they are different.

Evaluate and create

6 Which of these uses of the coast do you believe has the potential to cause the greatest environmental change? **Discuss** this with a partner and then with the class.

4.6 Gas exports

In this topic, you will:

» examine the effects of exporting natural gas on coastal landscapes.

liquefied natural gas (LNG)
natural gas that has been converted to a liquid form to make it easier and safer to transport and store

Human activities impact many coastal areas around the world. One such example is the natural gas plants on Curtis Island off the coast of Queensland (see Source 3).

Here, three large plants store **liquefied natural gas (LNG)**. The gas is extracted from onshore coal fields before being piped to Curtis Island. The companies that own the plants then sell the gas. This has created thousands of jobs and boosted the economy of the region. Companies all around the world buy the gas, including many in Asia.

To reach buyers, the gas is transported in huge ships. Each week, two to three specially designed ships carry LNG from Curtis Island to buyers in export markets.

Curtis Island is located beside the Great Barrier Reef. The Great Barrier Reef is the largest reef in the world and is considered one of the world's great natural wonders. It is also included on the United Nations World Heritage list. Curtis Island sits within the Great Barrier Reef World Heritage Area, so gas plant and ship operators must ensure that they follow strict guidelines about their impacts on the natural environment.

Impact on the environment

Some people remain concerned that the gas plants endanger the natural environment, including the reef. In particular, they are worried about the following:

- To allow large LNG ships to reach the gas plants, millions of cubic metres of sand and mud are dredged from the channel between Curtis Island and the mainland. This environment is home to marine life, such as turtles and dugongs.
- Some of the dredged material is dumped outside of the harbour, near the Great Barrier Reef.
- The LNG plants require a reliable supply of fresh water, so a desalination plant is being built as part of the facility. This takes water from the sea, removes the salt and pumps the salt back into the sea.
- The movement of ships through the reef means there is the potential for a shipping accident that may damage the reef.

KEY CONCEPT
Interconnection

Worksheet
Interconnection

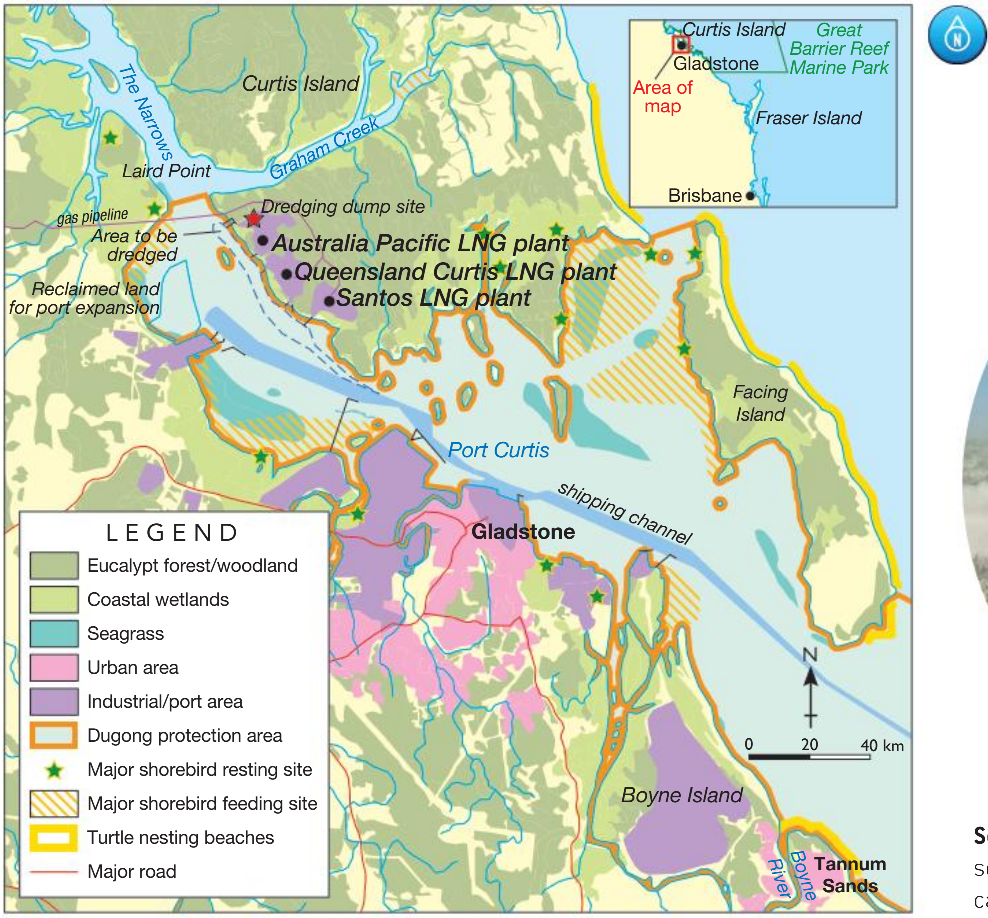
How gas connects us to China

Coal seam natural gas is mined in eastern Queensland, close to the towns of Roma and Fairfield. It is then piped 520 kilometres to Curtis Island, where it is converted to a liquid and loaded onto ships. These ships take the LNG to Asian markets, including China. The liquid is then converted back to gas and used to generate electricity for Chinese factories and homes. In this way, the coal-miners of Roma are linked to the people of Beijing. Geographers refer to this type of link as an interconnection.

Source 2 LNG tankers are loaded at gas plants on Curtis Island.

For more information on this key concept, refer to page 8 of 'The geography toolkit'.

NATURAL GAS PLANT AREA



Source 3 Source: Oxford University Press

Source 4 Dugongs rely on healthy seagrass in order to survive, but seagrass can be smothered by dredging.

4.6 CHECK YOUR LEARNING

Review and understand

1 In your own words, **define** LNG.

2 **List** two positive impacts and two negative impacts of the change on Curtis Island.

Apply and analyse

3 **Examine** the map in Source 3.

a **Identify** the location of this map in relation to Brisbane (this is known as 'relative location').

b Using the scale, **measure** the length of the turtle nesting beaches at Facing Island.

c Using the PQE method (see page 26 of 'The geography toolkit'), **describe** the distribution of major shorebird resting sites around the area.

d **Describe** the pattern of vegetation in the area.

e In pairs, **predict** how dredging in the area might affect dugongs.

4 **Apply** the geographical concept of interconnection to explain how gas connects us to China.

Evaluate and create

5 **Explain** how the Curtis Island development is an example of the ways in which landscapes have different values for different people (see topic 2.3 on page 44).

6 Open Google Earth on your device and complete these steps:

a Use the historical imagery tool to explore the changes that have taken place on Curtis Island.

b Copy dual images of the region in 2009 and 2020 (use 'copy image' in the edit menu) and label them to show the changes to the environment.

4.7 Pollution

In this topic, you will:

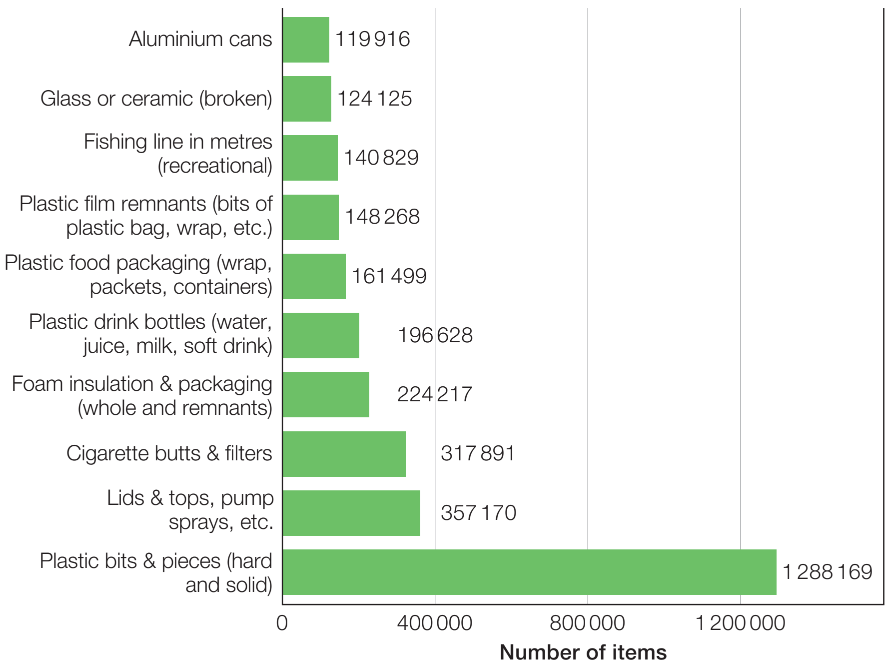
» investigate the human-made impact of discarded fishing equipment on coastal landscapes.

Although it may be hard to imagine, many of the activities that humans do on land can have serious consequences for coastal landscapes. The world's oceans and coasts are being **polluted** by human activities, including farming, shopping and travel.

For example, streams and rivers carry farming chemicals and fertilisers to the ocean, where they can cause a growth in some plants that smother ecosystems, such as coral reefs. Dredging of the sea floor also adds extra sediment to the ocean waters. This can smother habitats, such as seagrass, and block the sunlight that plants need to grow.

Pollution from urban areas, such as streets and rubbish dumps, can be carried into drains and streams. From there, they flow through to the sea. Plastics are the most visible of these pollutants as they float easily and are often washed onto coastal landscapes. Source 5 shows the top 10 items found on Australian beaches and waterways.

polluted
when harmful materials have been introduced into the environment



Data sourced from Tangaroa Blue Foundation

Source 5 Top 10 items: Beach and waterway clean-ups, Australia, 2004–15

Source 6 Despite being in the centre of the Pacific Ocean, many of Hawaii's beaches are covered in plastic rubbish. Most of this has been carried by ocean currents from the countries that surround the Pacific.

CASE STUDY

Ghost nets

Every year, about 640 000 tonnes of fishing gear (nets and tackle) is lost in the world's oceans. Most of this is made up of abandoned fishing nets that have drifted free from boats in extreme weather conditions, or have been cut free because they became entangled. In many cases it is cheaper and easier for fishermen working in waters to the north of Australia to cut these tangled nets free rather than to haul them in and untangle them. The nets – which are still afloat because they are plastic – are carried south on ocean currents and continue to entangle fish and other marine species, such as turtles, dugongs, and even sharks and crocodiles. They are referred to as 'ghost nets', and there are thousands of them in the oceans.

About 100 000 marine animals are killed by ghost nets every year. These include endangered mammals, such as whales and Australian sea lions. Reptiles such as turtles can also become entangled. In northern Australia, ocean currents and winds carry ghost nets into the Gulf of Carpentaria where they can remain for years, trapped by circulating currents (see Source 8). Tides and storms wash them onto the shore and then drag them back to sea or bury them in the sand.

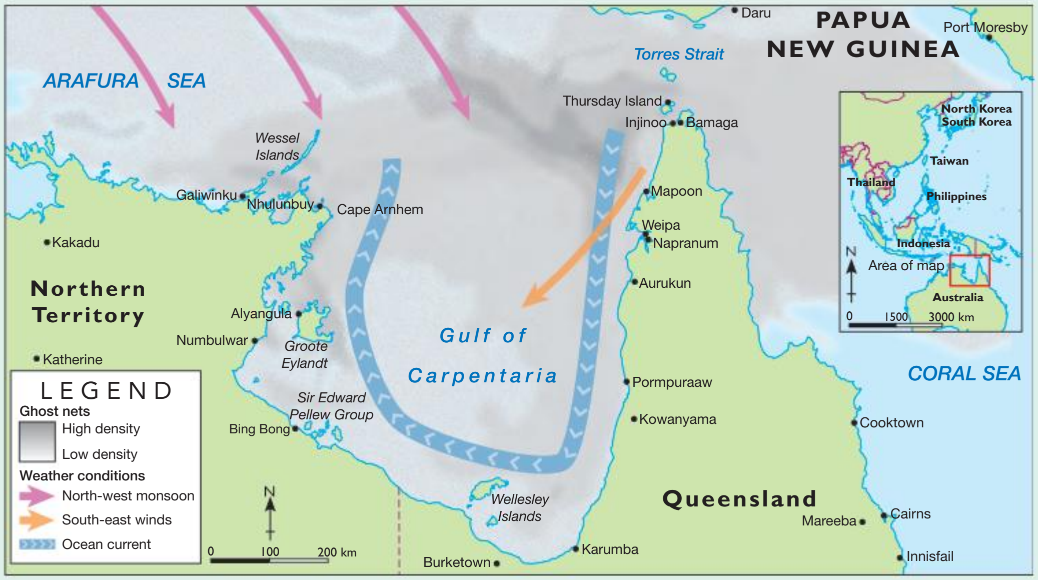
Source 7 Rescue came just in time for this turtle who was found trapped in a ghost net in the Indian Ocean.

See, think, wonder

Look at Source 7.

- What do you see?
- What do you think?
- What do you wonder?

THE GULF OF CARPENTARIA: WEATHER PATTERNS AND DENSITY OF GHOST NETS



Source 8 Source: Oxford University Press

Quiz me! A quick quiz on pollution

4.7 CHECK YOUR LEARNING

Review and understand

1. **List** the main types of plastic pollution on Australian beaches and waterways.
2. **Identify** some of the main sources of marine pollution.
3. In your own words, **define** ghost nets. In what parts of Australia are they a problem?

Apply and analyse

4. **Explain** how the plastic on Hawaii's beaches demonstrates the geographical concept of interconnection.
5. **Examine** Source 8. How do ocean currents and winds affect the movement of ghost nets? Refer to specific winds and places in your answer.

Evaluate and create

6. a **Propose** (put forward) one strategy that might help reduce the number of ghost nets in the oceans in order to improve sustainability. Be sure to explain your strategy and why it would be helpful.
   b Why do you think ghost nets are such a hard problem to solve?

4.8 Managing coastal landscapes

In this topic, you will:

- investigate methods of managing coastal landscapes, including Aboriginal methods of land use management.

Coasts are difficult landscapes to manage because they are such dynamic places. They are constantly changing, thanks to the natural and human activities taking place around them.

Natural processes such as erosion and deposition cause spits, cliffs, beaches and many other landforms to change. This can cause problems for communities such as those in Hampton Beach (see Rich task 4A on page 104) or Inverloch (see topic 4.9 on page 116).

Human activities can alter coastal landscapes in many ways. This may be a large-scale change, such as the one taking place at Curtis Island (see topic 4.6 on page 108), or a smaller scale change such as plastic rubbish on a beach (see topic 4.7 on page 110).

Because every coastal landscape is different, each change requires its own response. Geographers and scientists must consider conditions at the local scale to address change effectively. What works in one place may not work in another.

training walls
walls, banks, or jetties built to confine and direct the flow of a river or tide

Source 9 Many coastal communities have built sea walls to protect homes and roads from eroding waves.

Source 10 Other coastal communities use walls, known as **training walls**, to keep river mouths clear of sand that is moving along the coast.

CASE STUDY

Managing ghost nets

GhostNets Australia is an organisation dedicated to removing ghost nets from the waters and beaches of northern Australia. Formed in 2004, it is an alliance of 31 different coastal Aboriginal communities from Queensland, the Northern Territory and Western Australia. Since GhostNets Australia was formed, its rangers have retrieved about 14 000 nets from Australian waters. This represents more 100 kilometres of netting, retrieved from over 3000 kilometres of coastline. As well as removing the nets, these rangers free trapped wildlife, map the location of the nets using GPS systems, and try to identify the origin of the nets using resources supplied by the World Wildlife Fund.

Collecting spatial information

One of the biggest problems in removing ghost nets is locating them in millions of square kilometres of open ocean and thousands of kilometres of coastline. Scientists are working on several tools that will help in this fight.

One of these tools is a small, inexpensive tracking device that fishers can attach to their nets so they can be located if they are discarded. The devices can also be placed onto nets found by fishers at sea, who may find it difficult to bring the nets onto their boats.

There are several global databases that monitor these tracking devices. They can then send location information to organisations such as GhostNets Australia, which can retrieve them.

Source 11 Wik and Kugu rangers removing a ghost net from the shore at western Cape York

Source 12 The Ghost Gear Reporter App lets anyone with a smartphone record and report the location of abandoned fishing gear.

4.8 CHECK YOUR LEARNING

Review and understand

1 **Identify** two natural processes that cause coastal landscapes to change.

2 **Outline** how coastal communities respond to wave erosion.

Apply and analyse

3 **Identify** one method the community has used to respond to an environmental problem in the following sources:

  a Source 1 in the opening of this chapter (pages 92 to 93).

  b Source 12 in Rich task 4A (page 104).

4 a **Compare** Sources 9 and 10. Remember, when you compare two things, you should talk about their similarities and their differences.

  b Each of these communities has built walls to protect its coastline; however, each community is facing a different problem. **Explain** how each of these problems is different.

5 **Explain** how spatial technology allows rangers to find the absolute location of ghost nets, and why this is important.

Evaluate and create

6 Install the Ghost Gear Reporter app on your phone or smart device. In a short paragraph, **summarise** the type of information that the app collects.

7 Using Google Earth, locate one coastal community in your state.

  a Record the absolute location (that is, latitude and longitude).

  b Identify at least one structure that has been built in response to coastal erosion or deposition.

  Analyse the strengths and weaknesses of the structure you identified in part b.

Worksheet
Being a coastal landscape manager

4B RICH TASK

Quizlet
Revise the key terms you have learnt so far.

Tweed Heads sand bypassing

Tweed Heads is located on the border of New South Wales and Queensland. It is home to the Tweed River, where coastal management can be seen in action at the mouth of the river.

Over centuries, northward sand movement has caused the mouth of the Tweed River to be clogged with sand, and a large dangerous sandbar to form. In order to address this problem, large walls were built to trap the sand. While this largely solved the problem of sand building up, it caused a different problem. The sand that had been trapped by the walls was now no longer able to flow through the river and nourish the beaches of southern Queensland, including tourist beaches on the Gold Coast.

To solve this problem, sand is now pumped from a sand-collection jetty on the south side of the river. From there, it is transported through a system of pipes across the headland to the northern beaches. The system is designed to mimic the natural movement of sand along the coast. When there is a large volume of sand moving, more pumps automatically switch on to move it. The strategy of sand pumping has proven to be effective at keeping sand from clogging up the river mouth, while still supplying sand to the beach north of the river.

Source 13 A vertical aerial photograph of Tweed Heads in 2021

KEY SKILL
Conducting fieldwork

Drawing sketch maps

One of the most useful skills a geographer can master is the drawing of sketch maps. Sketch maps show the main features of the landscape that you are studying, but do not contain the details you would be expected to include on a formal map.

The steps listed here are for a sketch map that you would complete as part of your fieldwork. While conducting fieldwork, you will probably start with a basic outline map of the main features of the location you are studying, such as a coastline, as shown in Source 14.

Step 1 Look closely at the outline map you have been given to see if you can recognise some of the features around you. Orient your map by turning it around so that it is facing the right way.

Step 2 Decide on the focus of your fieldwork. If you are studying the ways in which people have managed a coastal landscape, for example, you will mark on your map features such as training walls and a sand collection jetty.

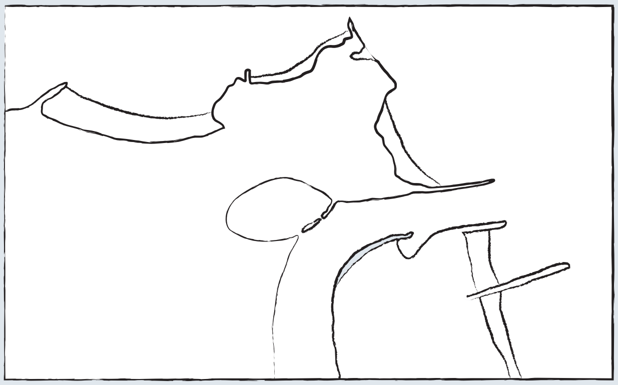
Step 3 Label the features that you recognise. Keep your writing neat and level across the page.

Step 4 Look around the area you are studying in your fieldwork and find other examples of ways in which people have managed the coast. Locate and label these on your sketch map. You may find it best to shade large areas, such as training walls, and to add a legend to explain the shading and any other symbols you use.

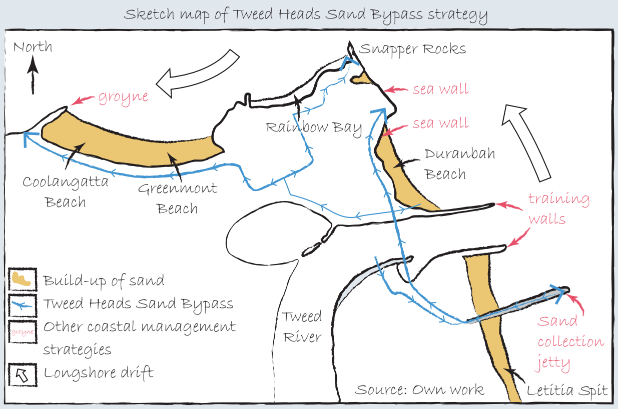
Step 5 Add carefully labelled arrows to show examples of movement. For example, in the sketch map of the Tweed Heads Sand Bypass strategy (Source 15), arrows show the direction in which sand is moving. Other examples may include the movement of people, cars and water.

Step 6 Add any examples you can find of change over time. A build-up of sand on one side of a groyne (a barrier built into the water from a beach to prevent erosion), for example, shows that sand is moving along a beach. A collapsed stack or a pile of rocks at the base of a cliff is evidence of erosion.

Step 7 Add a title that includes the date, and a north arrow. (You may need to use a compass or an app.)



Source 14 An outline map of the Tweed Heads region.



Source 15 A completed sketch map of the Tweed Heads Sand Bypass strategy

Source 16 A vertical aerial photograph of Hampton Beach, Port Phillip Bay, 2021

Practise the skill

1 **Create** a sketch map of the area shown in Source 16 (a larger version is available on your obook pro), or another coastline. Remember to use all BOLTSS features. On your sketch map, show how people have managed this coast.

Extend your understanding

1 **Explain** why training walls were built at the mouth of the Tweed River.

2 What effect did the training walls have on the beaches north of the river?

3 **Identify** the coastal process that the training walls and groynes were designed to manage.

4 How successful has the Tweed Heads Sand Bypass strategy been? Use some evidence from the vertical aerial photograph in Source 13 to support your answer.

5 **Identify** and **describe** two pieces of evidence in Source 13 that show sand is moving down the Tweed River.

4.9 Coastal erosion

In this topic, you will:

- » identify the causes of coastal erosion
- » outline how humans respond to coastal erosion, and outline land use management practices to manage it.

Waves and currents are constantly changing coastal landscapes. In some places, wave action erodes beaches and cliffs, which can create many problems for people who live in coastal communities. Many built features (such as caravan park facilities, roads, houses, walls and playgrounds) on or near an eroding coastline face the constant threat of collapsing into the sea. Most at risk are communities built on sandy coastlines, as these landforms can change very rapidly – with devastating consequences.

As the climate changes and causes sea levels to rise around the world, this issue is getting worse. Sea level is rising at about 3 millimetres per year and has been doing so since reliable measuring began about 30 years ago. Waves now break further up the beach than before, eroding dunes and cliffs. This is most noticeable during storm events and high tides.

1 The surf lifesaving club sits on top of the rapidly eroding dunes. Two lifesaving towers on the beach have been lost to erosion since 2012.

2 Bunurong Road is now within 6 metres of the eroding waves at high tide. A rock wall has recently been built to protect the road.

Source 1 The beach at Inverloch is eroding from wind and waves.

Inverloch's disappearing beach

CASE STUDY

Inverloch beach on Victoria's Gippsland coast is a dynamic coastal environment. Longshore drift carries sand to the beach during calm weather, particularly in spring and summer. During winter storms, some of this sand is eroded and carried away. Historically, the beach at Inverloch maintained a balance between sand gained and sand lost. The beach changed shape each year, but remained largely intact. However, in recent years this situation has changed.

The volume of sand lost in storms now exceeds the amount gained during calm weather. This is because the sea levels have resulted in stronger, larger waves breaking at the foot of the dunes. Between 2012 and 2020, the beach in front of the surf lifesaving club receded by 33 metres. Nearby Bunurong Road is also in danger of collapsing into the sea.

Attempts have been made to control the erosion. These include measures such as building wet fences that allow waves to pass through but trap the sand; moving sand onto the beach; and building walls from textile bags and rocks. Some locals are worried, however, that these attempts destroy the aesthetic value of their beach.

Meanwhile, the sea continues to rise, further eroding the beach.

Explore it!
A virtual field trip to Inverloch beach

4.9 CHECK YOUR LEARNING

Review and understand

1 **Identify** two causes of coastal erosion.

Apply and analyse

2 **Explain** how rising sea levels are changing the coast at Inverloch.

3 **Examine** Source 1 and refer to page 15 of 'The geography toolkit' to help you answer the following questions.

- a There are different types of geographical images, including ground-level, oblique aerial, vertical aerial and satellite. **Identify** which type of geographical photo this is, and explain why.
- b **Identify** the year in which erosion was the greatest at Inverloch.
- c Use the scale to **measure** the distance from the 2015 erosion line to Bunurong Road and the surf lifesaving club.
- d There is a small stream that enters the sea 100 metres west of the surf lifesaving club. How do you think this landscape feature impacts the extent of erosion in this area?

Evaluate and create

4 Many other Victorian beaches are also under threat from rising seas, including Apollo Bay, Portsea Ocean Beach, Indented Head and Venus Bay. **Research** one of these beaches to write your own case study box like the one on Inverloch.

5 Imagine that you are a teacher planning a field trip to Inverloch to study erosion. What activities would you ask your students to complete to help them understand how this coast is changing?

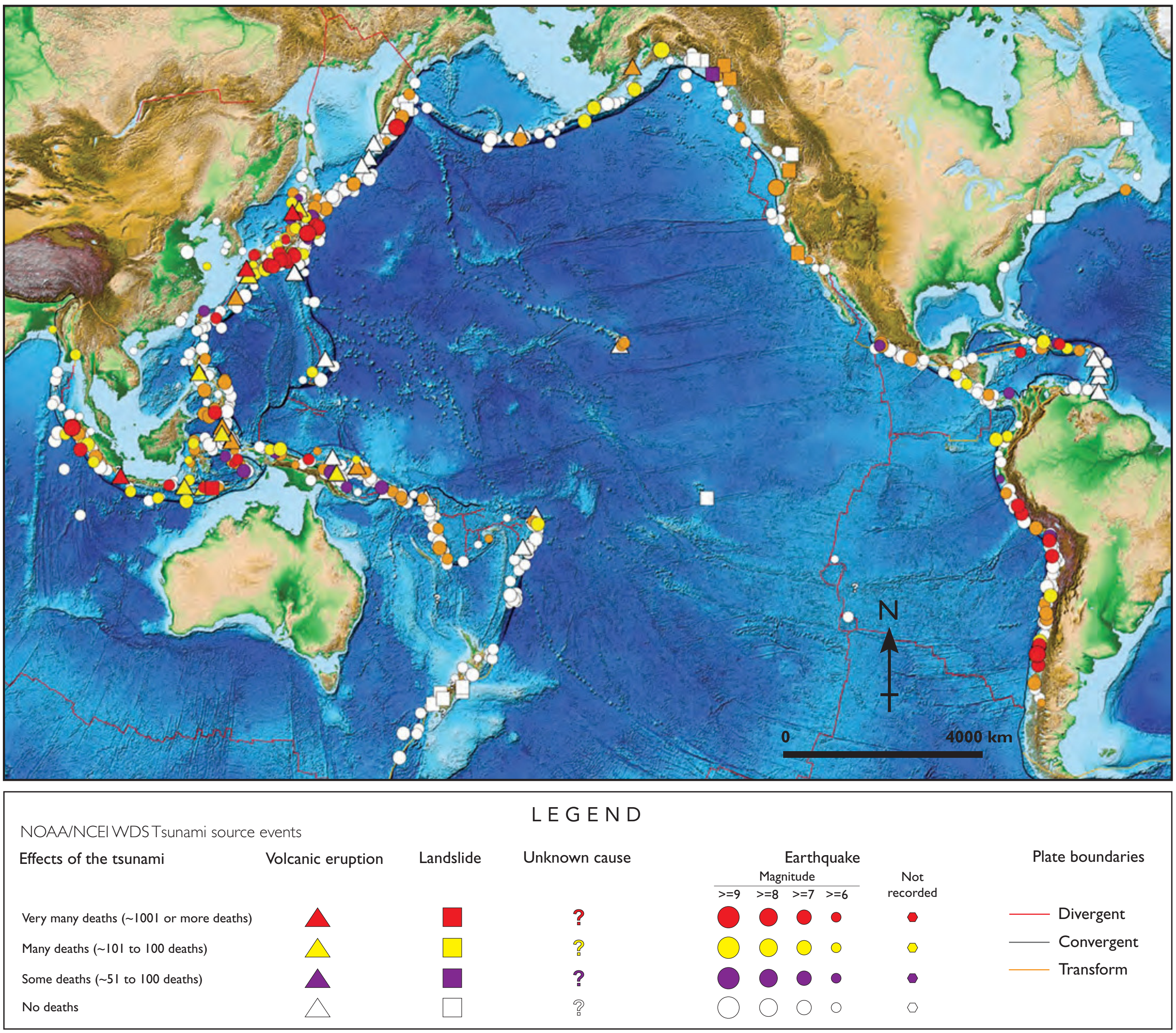
4.10 Tsunamis

In this topic, you will:

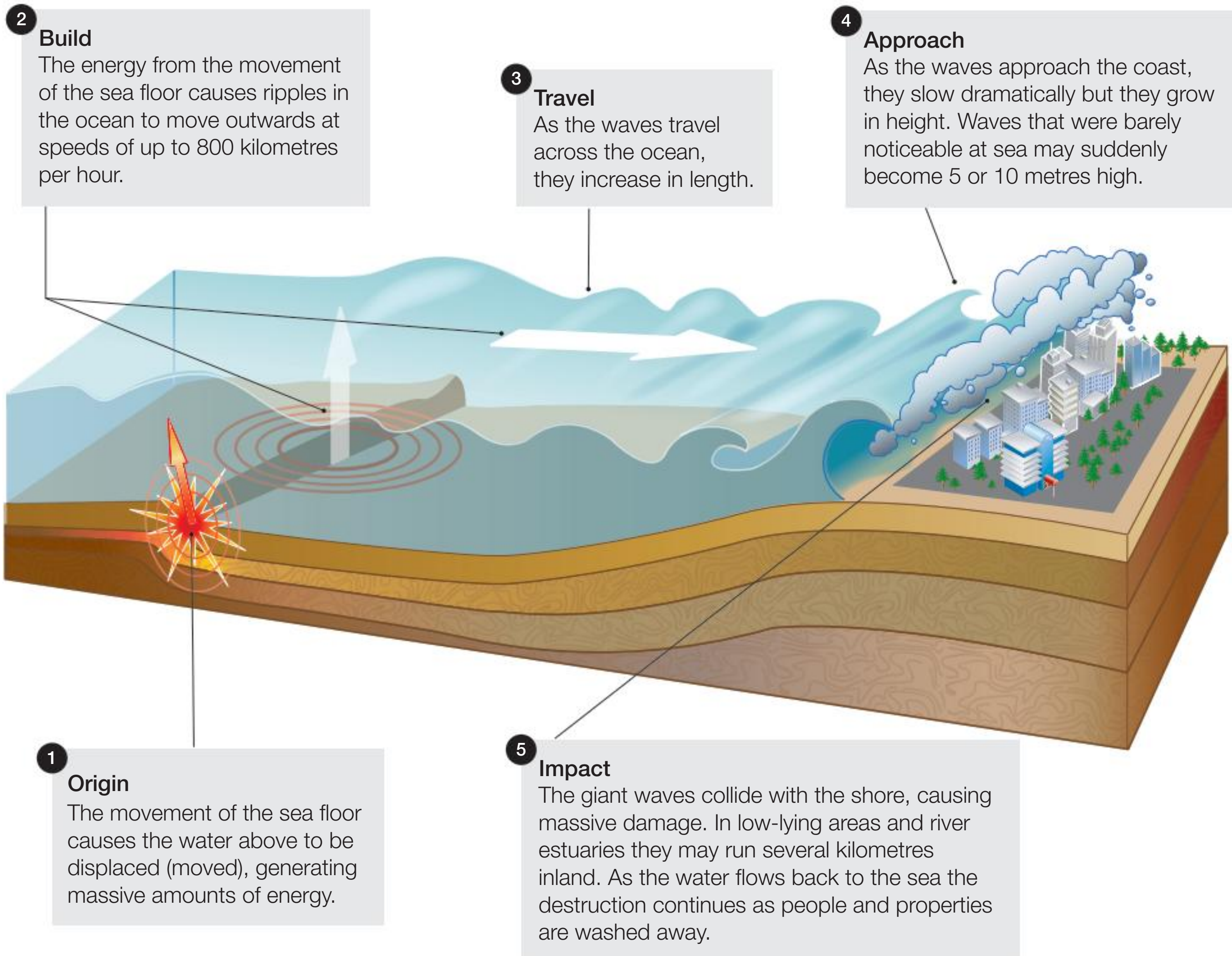
- » identify the causes of tsunamis
- » outline how humans respond to tsunamis and can prepare for them in the future.

Giant waves called tsunamis (a Japanese word meaning 'harbour wave') are perhaps the most terrifying coastal hazard. A tsunami is created when natural events move a huge amount of water in a short period of time. The largest and most common tsunamis are created when the sea floor moves upwards during an earthquake. This causes a series of high, very broad waves to be generated. Other events that can cause tsunamis include underwater volcanic eruptions and landslides. Smaller tsunamis can be created when a large landslide reaches the sea or when large sheets of ice break off glaciers.

PACIFIC REGION: TSUNAMIS FROM 1610 BCE TO 2016 CE, SHOWING THEIR ORIGIN AND IMPACT



Source 2 Source: National Oceanic and Atmospheric Administration/National Centers for Environmental Information World Data Service



Source 3 The life cycle of a tsunami

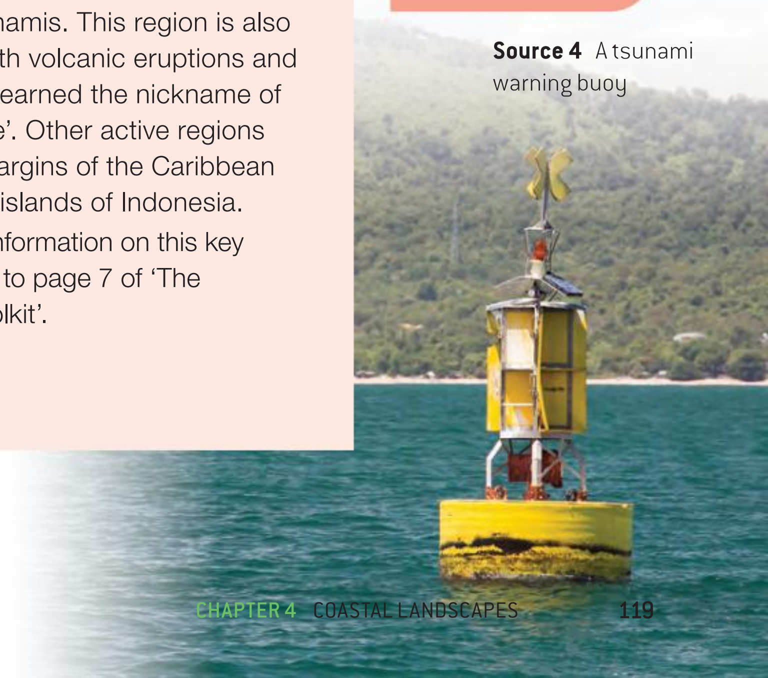
Where do tsunamis occur?

Geographers have noticed that some coastal areas are much more at risk from tsunamis than others. By comparing the spatial distribution of tectonic plate boundaries, earthquakes and tsunamis, they found that coastal areas facing a region where undersea earthquakes occur are most at risk from tsunamis. Japan is the world's most tsunami-prone country, as its east coast lies within 100 kilometres of a very active plate boundary.

Most of the world's most destructive tsunamis have occurred on the margin of the Pacific Plate (see Source 13 on page 61). As other plates push against the Pacific Plate or slide beside it, they trigger earthquakes that are often the source of tsunamis. This region is also associated with volcanic eruptions and has therefore earned the nickname of the 'ring of fire'. Other active regions include the margins of the Caribbean Plate and the islands of Indonesia.

For more information on this key concept, refer to page 7 of 'The geography toolkit'.

KEY CONCEPT
Space



Source 4 A tsunami warning buoy

Japan earthquake and tsunami (2011)

epicentre
the place on the Earth's surface directly above where an earthquake occurs

On 11 March 2011, one of the largest earthquakes ever recorded sent massive tsunami waves racing towards Japan and eastward across the Pacific Ocean. Within an hour, tsunami waves up to 7 metres high reached Japan's east coast and caused immediate devastation.

Source 5 A view from a helicopter of the town of Minamisanriku, moments after the tsunami receded

The waves in some places pushed several kilometres inland. The water washed away buildings, cars, roads and people.

The damage was the worst in areas closest to the **epicentre** of the earthquake; in these areas entire towns were destroyed or entirely washed away. The movement of the tsunami waves was strongly influenced by the shape of the land, as the water tended to be funnelled into estuaries and bays. In one location, researchers found fishing equipment that had been carried 30 metres up a cliff face, making these waves among the highest ever recorded in Japan.

Nuclear reactors at the Fukushima Daiichi Power Plant were damaged, releasing high levels of radiation into the atmosphere. In response to the disaster, all people living within 20 kilometres of the damaged power plant were ordered to evacuate their homes.

An estimated 20 000 people were killed in this double disaster, and half a million people lost their homes.

4.10 CHECK YOUR LEARNING

Review and understand

1 a **Identify** the most common cause of a tsunami.
  b **Identify** two other causes of tsunamis.
2 Why does Japan experience so many tsunamis?

Apply and analyse

3 **Explain** why the 2011 Japanese event is referred to as a 'double disaster'.
4 Examine Source 2.
  a Using the political map at the back of your book, **list** the countries in the Pacific region that have experienced tsunamis resulting in 'very many deaths'.
  b Explain how the legend of this map tells you how the tsunamis shown were caused.
  c Use the legend to **determine** what causes the most tsunamis: earthquakes, volcanoes or landslides. Explain your working out.
  d **Explain** the relationship between plate boundaries and tsunamis.
5 **Describe** the scene in Source 5 as if you were a news reporter in the helicopter.

Evaluate and create

6 a In small groups, **propose** three strategies that people could use to prepare for a tsunami.
  b **Evaluate** each of your strategies by thinking carefully about their strengths and weaknesses.
  c Share your ideas with the class.

4.11 Indian Ocean earthquake and tsunami (2004)

In this topic, you will:

- investigate the tsunami that impacted Indonesia and other countries in 2004
- outline the impacts that this tsunami had on the landscape and community.

On Boxing Day 2004, a natural disaster of epic scale and force struck many of the countries surrounding the Indian Ocean. A massive earthquake, the largest recorded in 40 years, set off a huge landslide on an undersea mountain range near the southern coast of the Indonesian island of Sumatra. The landslide pushed water upwards and sideways, starting a tsunami. The waves – some up to 30 metres high and travelling at 800 kilometres per hour – slammed into the coast of Indonesia, flooding towns and villages such as Banda Aceh, which were already in ruins from the earthquake.

The tsunami then travelled across the Indian Ocean, sending huge amounts of water inland with tremendous force wherever it encountered low-lying coastal areas. Indonesia, Sri Lanka, India, Thailand and Myanmar were most affected, but deaths were recorded as far away as Somalia, Tanzania and even South Africa. By the time the tsunami had run its course, much of coastal Asia lay in ruins.

More than 280 000 lives were lost in the disaster, making it the world's deadliest tsunami on record. Twenty-six Australians were killed, most of whom were holidaying in Thailand.

Many of the towns, cities and tourist resorts have now been rebuilt, but the risk of another tsunami is always present.

Source 6 The Indonesian city of Banda Aceh was closest to the centre of the earthquake. Around 60 per cent of the city's buildings were destroyed.

KEY SKILL
Interpreting geographical images

Analysing change using satellite images

By examining satellite images closely, you can describe changes that have occurred over time and suggest explanations for these changes.

When studying the same area at two different times, find a key feature as a reference point on both sources. In Sources 7 and 8, the road in the bottom right-hand corner of each image is a feature that we can examine to see how the landscape has changed.

Practise the skill

Step 1 List the differences between Source 7 (before the tsunami) and Source 8 (after the tsunami).

Step 2 Find three key features in Source 7.

Step 3 Describe how these have changed after the tsunami in Source 8.

Step 4 In a carefully worded paragraph, analyse the change that occurred during this tsunami by:

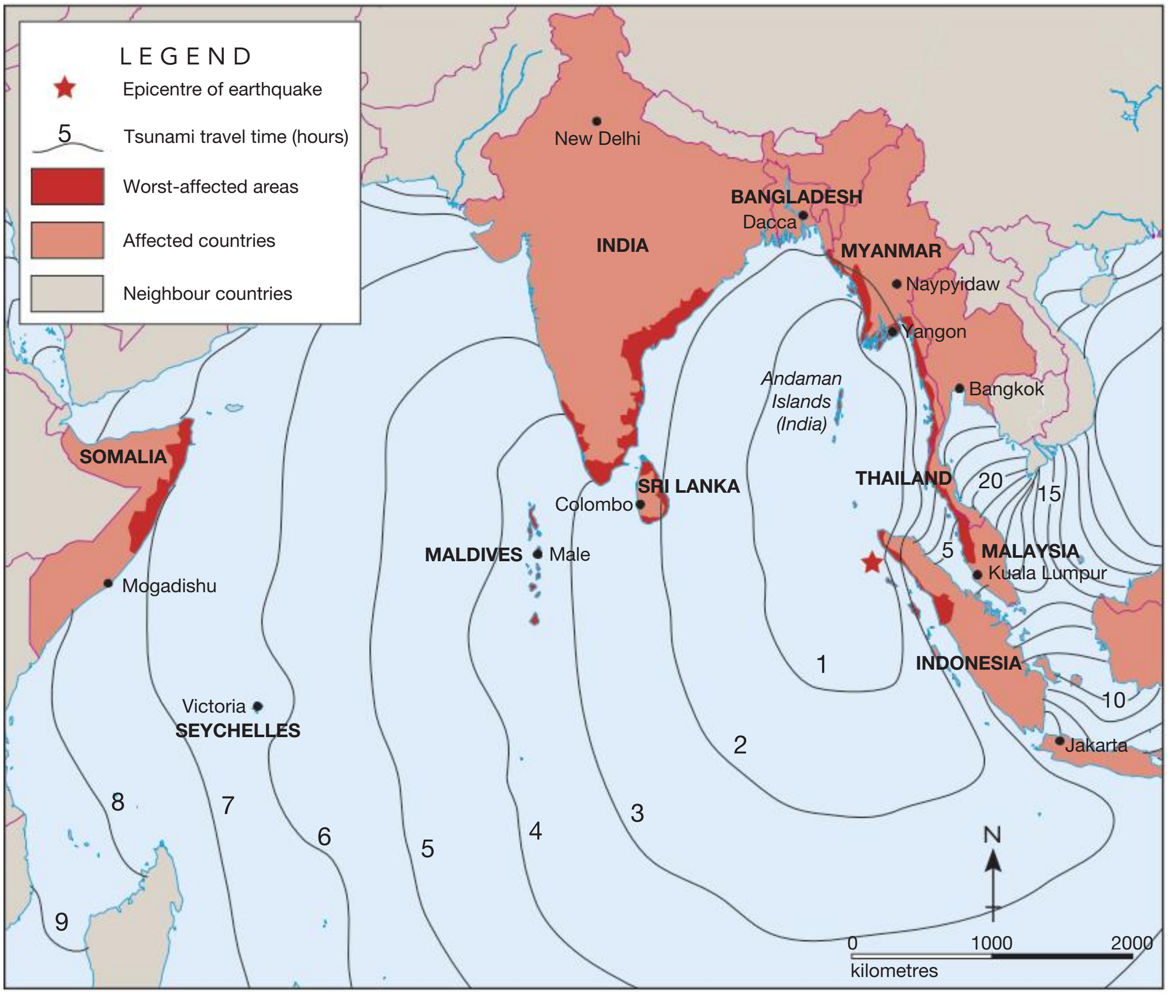
- stating when and where the tsunami took place
- identifying the cause of the tsunami
- describing the effects of the tsunami, using evidence from the images in Sources 7 and 8
- suggesting one extra piece of evidence (that you cannot see in these images) that could be helpful for understanding how this tsunami changed the landscape.

For more information on this key skill, refer to page 15 of 'The geography toolkit'.

Source 7 Banda Aceh, Indonesia, before the tsunami struck: 23 June 2004

Source 8 Banda Aceh, Indonesia, after the tsunami struck: 28 December 2004

THE 2004 TSUNAMI



Source 9

Source: Oxford University Press

4.11 CHECK YOUR LEARNING

Review and understand

1. **Identify** what triggered the 2004 tsunami.
2. **Outline** why the Indonesian city of Banda Aceh was the most severely impacted by the tsunami.
3. Use Source 6 to **describe** the impacts of the tsunami on Banda Aceh in your own words.

Apply and analyse

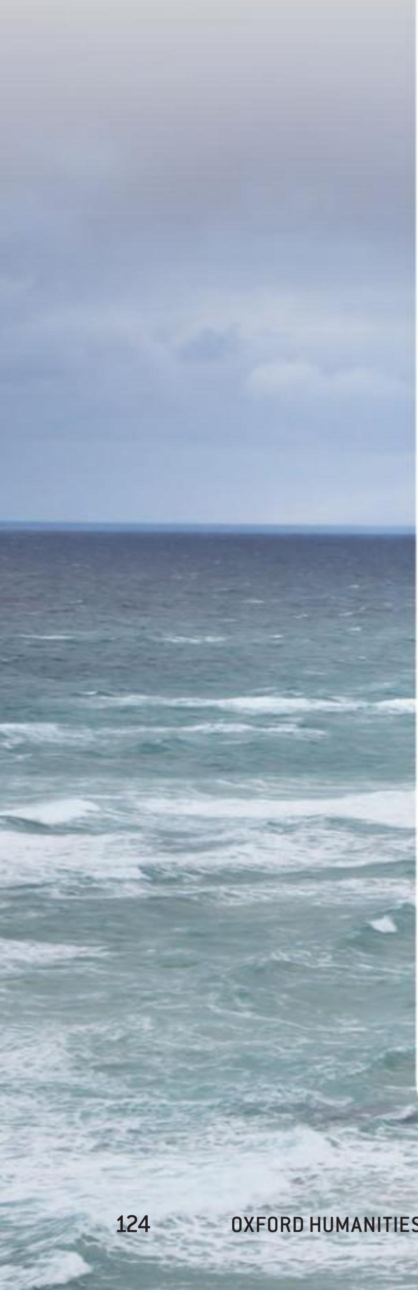
4. Although the tsunami began in Indonesia, countries as far away as Somalia in Africa and Sri Lanka were severely impacted. Why do you think this was the case?
5. **Examine** Source 9.
   - a Using the scale, measure the distance between the earthquake epicentre and Mogadishu.
   - b **Identify** how long it took the tsunami waves to cross the Indian Ocean.
   - c Using the PQE method (see page 26 of 'The geography toolkit'), describe the pattern of affected areas of the 2004 tsunami. Make sure you use the correct sentence starters.

Evaluate and create

6. Sketch the outline of the Banda Aceh coast as shown in Source 7. On your sketch, label five changes caused by the 2004 tsunami.
7. Design a tsunami warning sign to be placed on beaches in Thailand, Indonesia and Sri Lanka. Because locals and tourists speak many different languages your sign needs to communicate its warning in pictures only.

4C RICH TASK

Quizlet
Revise the key terms you have learnt so far.



The Twelve Apostles

Victoria's south-western coastline is under constant attack from the water. Large, destructive waves from the Southern Ocean are eroding the soft limestone. Softer rocks are being eroded more quickly, while harder rocks are withstanding the attack a little longer. These harder rocks remain as stacks, arches and headlands, producing one of the world's most spectacular coasts.

More than 1 million visitors a year are drawn to the Port Campbell coast, many of whom are secondary school students who come to see and study coastal erosion in action.

KEY SKILL
Conducting fieldwork

Creating a field sketch

Field sketching is an important skill for all geographers. It is used to show the different geographic features of a landscape in a simple visual form. Being able to sketch the features of an environment is useful, as it can provide the geographer with a visual record of their observations while in the field. Outlines, shading and annotations and labels are used by the geographer to capture all relevant details of the environment being observed in their sketch.

For example, imagine that you are standing on the viewing platform looking at the Twelve Apostles while on a geography field trip. You have been asked to complete a field sketch with a focus on the ways in which this coast is changing. Sources 11 to 13 demonstrate how to build up a field sketch.

Follow these steps to complete a field sketch.

Step 1 Establish the boundaries of your landscape and draw a border of the correct shape.

Step 2 With a pencil, lightly sketch the main landscape lines. If there is a horizon in the scene, put this about one-third from the top of the frame.

Step 3 Keeping in mind the features that you want to focus on, add detail to your sketch.

Step 4 Add shading. Shading helps to establish depth in your sketch and helps to show the shape of objects.

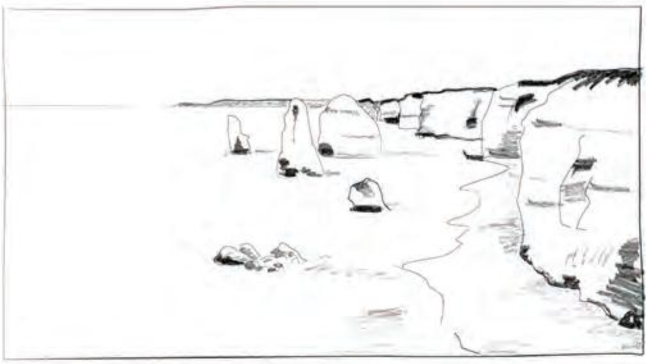
Step 5 Add some colour if you wish. Do not try to copy every subtle colour of nature; just give a hint of the right colour. Label those parts of the scene that you consider most important.

Step 6 Label your sketch with the location and date.

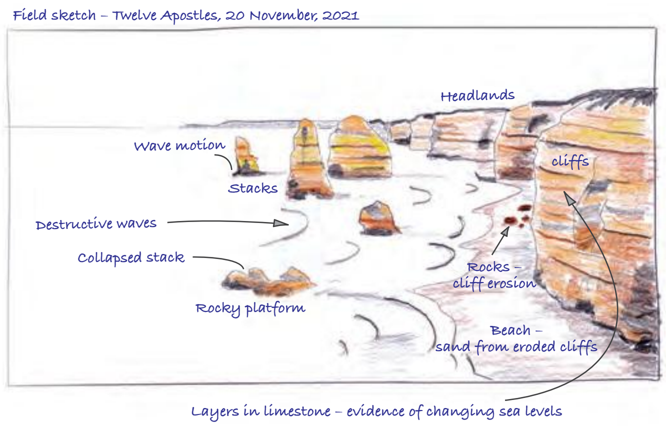
For more information on this key skill, refer to page 14 of 'The geography toolkit'.

Source 10 The Twelve Apostles, seen from the visitors' viewing platform.

Source 11 Steps 1–2 in completing a field sketch of the Twelve Apostles



Source 12 Steps 3–4 in completing a field sketch of the Twelve Apostles



Source 13 Steps 5–6 in completing a field sketch of the Twelve Apostles

Practise the skill

1 Complete a field sketch of the Wollongong coast, using Source 1 in the opening of this chapter. On your sketch, label the following features:
- beach
- headland
- marina
- wave-cut platform
- destructive waves
- groyne.

Use arrows to show the likely direction of longshore drift.

Extend your understanding

1 What evidence is there in Source 10 that this coast is changing over time? **Justify** (give reasons for) your answer.

2 **Describe** the natural forces that are bringing about these changes.

3 **Distinguish between** this and the coastal landscape shown in Source 1 in the opening of this chapter. Remember, when you distinguish between two things, you should talk about how they are different.

4 **Explain** why you think these differences occur.

5 **Suggest** two management strategies that could protect this coastline. Remember that there are a number of factors that impact on natural environments, including erosion, deposition and human activities.

6 **Predict** which natural hazards might occur if the coastline in this task sat along a tectonic plate boundary.

4 CHAPTER REVIEW

Review questions

4A How are coastal landscapes formed?

1 Why are coastal landscapes such dynamic places? **Identify** two specific reasons in your answer. (2 marks)

2 **Explain** why each coastal landform is unique (for example, there are no two identical stacks anywhere in the world). (3 marks)

3 **Create** a diagram that shows how sand dunes are formed in a coastal landscape. (5 marks)

(Total: 10 marks)

4B How are coastal landscapes used and managed?

1 **Identify** two human activities that can bring change to coastal landscapes. (2 marks)

2 **Outline** why many of Hawaii's beaches are covered in plastic rubbish. (2 marks)

3 **Discuss** the strategy of trapping sand at the mouth of the Tweed Heads River, on the border of New South Wales and Queensland. Remember, the best discussions always consider both sides of the argument. Make sure to give your overall opinion on this strategy too. (6 marks)

(Total: 10 marks)

4C Are coastal landscapes hazardous places?

1 'A tsunami could never happen in Australia.' **To what extent** do you agree with this? A lot (strongly), a little bit (somewhat) or not at all? Write a short paragraph explaining your position, using evidence to support your response. (10 marks)

(Total: 10 marks)

Review activity

Stockton Beach

Stockton Beach is located at the mouth of the Hunter River in New South Wales. Across the river lies the large city of Newcastle. Boats entering the port of Newcastle pass Stockton Beach. It has long been renowned as a holiday destination and is home to the Stockton Dunes, an area of large sand dunes loved by four-wheel drivers, quad bikers and campers. In recent years, however, Stockton Beach is being washed away. A childcare centre was demolished before it fell into the sea. Now, roads, homes, a caravan park, a surf lifesaving club and a football oval are all under threat.

1 **Identify** the type of landform shown in Source 14. (1 mark)

2 What is the likely direction of longshore drift on Stockton Beach? (1 mark)

3 Is this a constructive or destructive beach landscape? Give two reasons for your answer. (3 marks)

4 **Examine** Source 14.
   - a **Identify** two structures that have been built to change natural coastal processes. (2 marks)
   - b **Outline** what these structures are designed to do. (2 marks)
   - c **Predict** whether these structures may have contributed to the problem of coastal erosion. (3 marks)

5 As well as impacting the coastline, the increased erosion of Stockton Beach has impacted the community. **Propose** one strategy that the community could use to slow or stop the erosion in this area. In your response:
   - **Suggest** two ways the economy is impacted by erosion.
   - Describe how your strategy will address the erosion of the dunes.
   - Think carefully about your strategy. Identify one strength and one weakness of putting it into place. (8 marks)

(Total: 20 marks)

Source 14 Stockton Beach

Check your Student obook pro for these digital resources and more:

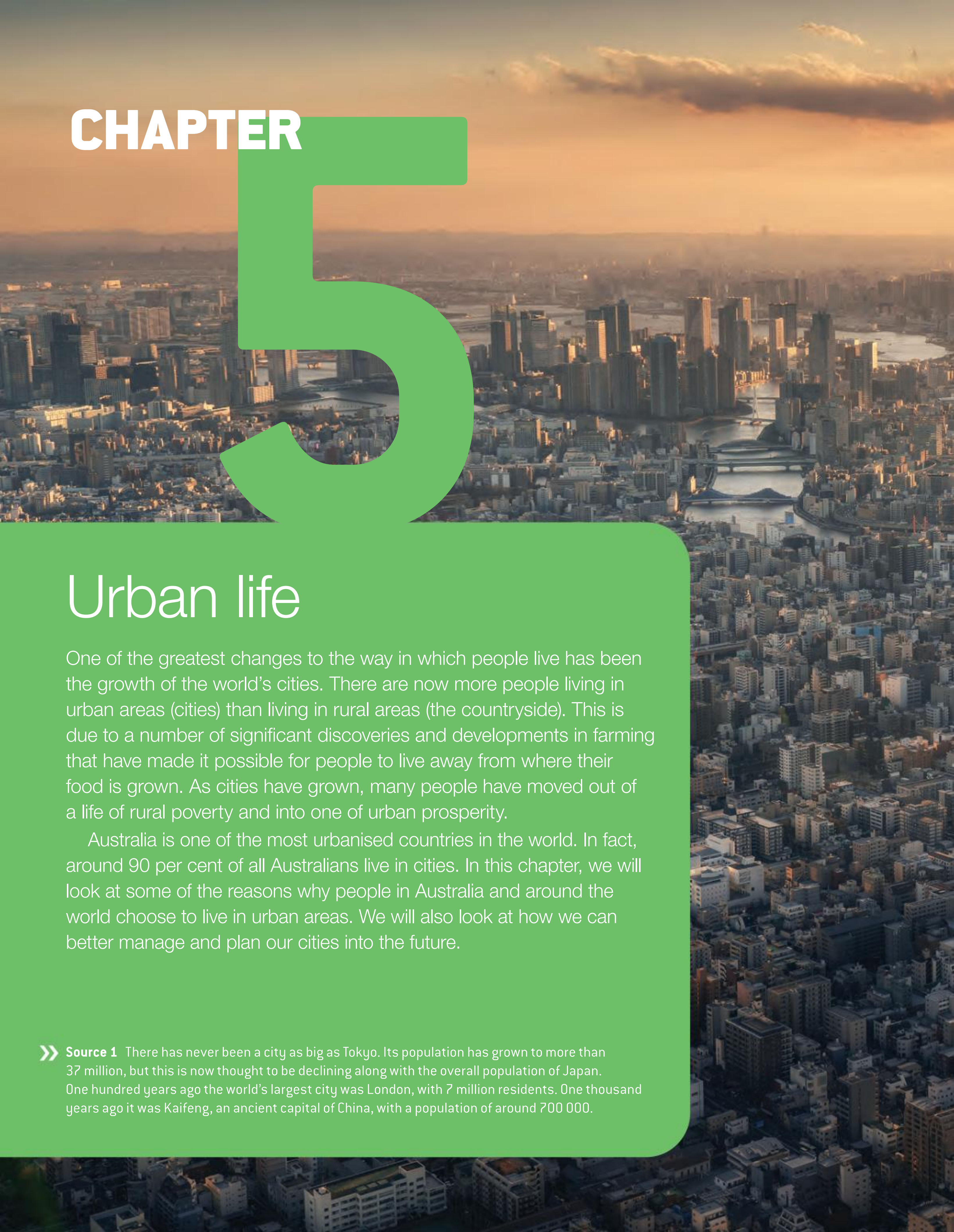
- **Student book questions** Chapter 4
- **Key skill worksheet** Communicating & reflecting: Chapter 4
- **Quizlet** Play a game of Quizlet on Coastal landscapes.
- **Chapter review quiz** Chapter 4

CHAPTER 5

Urban life

One of the greatest changes to the way in which people live has been the growth of the world's cities. There are now more people living in urban areas (cities) than living in rural areas (the countryside). This is due to a number of significant discoveries and developments in farming that have made it possible for people to live away from where their food is grown. As cities have grown, many people have moved out of a life of rural poverty and into one of urban prosperity.

Australia is one of the most urbanised countries in the world. In fact, around 90 per cent of all Australians live in cities. In this chapter, we will look at some of the reasons why people in Australia and around the world choose to live in urban areas. We will also look at how we can better manage and plan our cities into the future.



Source 1 There has never been a city as big as Tokyo. Its population has grown to more than 37 million, but this is now thought to be declining along with the overall population of Japan. One hundred years ago the world's largest city was London, with 7 million residents. One thousand years ago it was Kaifeng, an ancient capital of China, with a population of around 700 000.

Changing nations

5A
Why do people live in cities?

5B
Where do people in different countries live?

5C
How can we plan for and manage Australia's future?

5.1 The urban explosion

In this topic, you will:

- define urbanisation
- examine the causes and consequences of urbanisation.

It is almost impossible to imagine the world today without huge cities. However, up until around 250 years ago, most people lived in small family groups or rural communities. There, they farmed land and raised animals to meet their own needs. Of course, there were large cities in ancient times, such as Rome and Athens, but these were the exception rather than the rule.

This all changed with the arrival of the **industrial age**. New, improved farming methods and machinery meant that fewer people were needed to grow and produce larger amounts of food. In the cities, new inventions created jobs for many people.

Less work in rural areas caused people to flood into cities looking for work. This trend quickly changed the economies of many countries, and cities became centres of industry and business. The social and economic change brought about by the increase in urban populations is known as urbanisation (see pages 136 to 137 for more on urbanisation).

Cities around the world have grown rapidly in the last 60 years. In 1960, the world's population was around 3 billion and only one-third of these people lived in cities. Today, there are more than 7.5 billion people on Earth and more than half of them live in cities. While many of these cities have populations under 1 million, there has been an explosion in the number and size of the world's very large cities. Cities with a population greater than 10 million are called megacities.

Geographers refer to the rapid growth of the world's cities in the last 20 years as an urban explosion.

industrial age
a period of history that began around 1760; it saw huge social and economic changes in society due to the widespread use of machinery, factories and automatic labour

infrastructure
the facilities and services necessary for any community, city or country to function

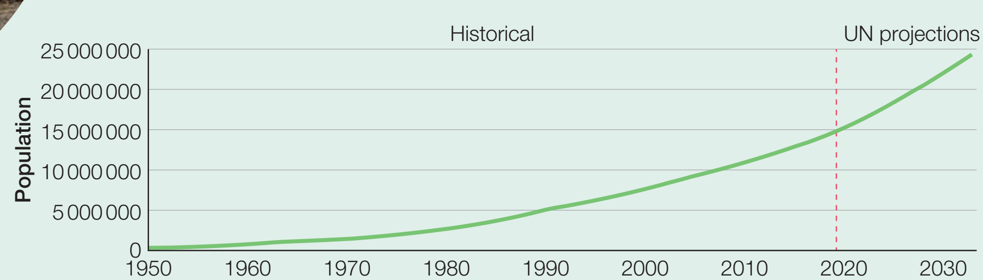
CASE STUDY

Lagos, Nigeria

In 1960, fewer than 200 000 people lived in Lagos, Nigeria. This is about the size of Townsville today. The infrastructure of the city reflected its small population. For example, there were few paved roads and hardly any buildings over six storeys high. In just 60 years, Lagos has become a megacity with more than 13 million inhabitants.

People from the countryside have flooded into Lagos seeking a better life. For many of these new arrivals, life in their new city is tough. The population boomed so quickly that the infrastructure of the city could not keep up. Most people live in slums, where very few homes are connected to basic services such as water, sanitation and electricity.

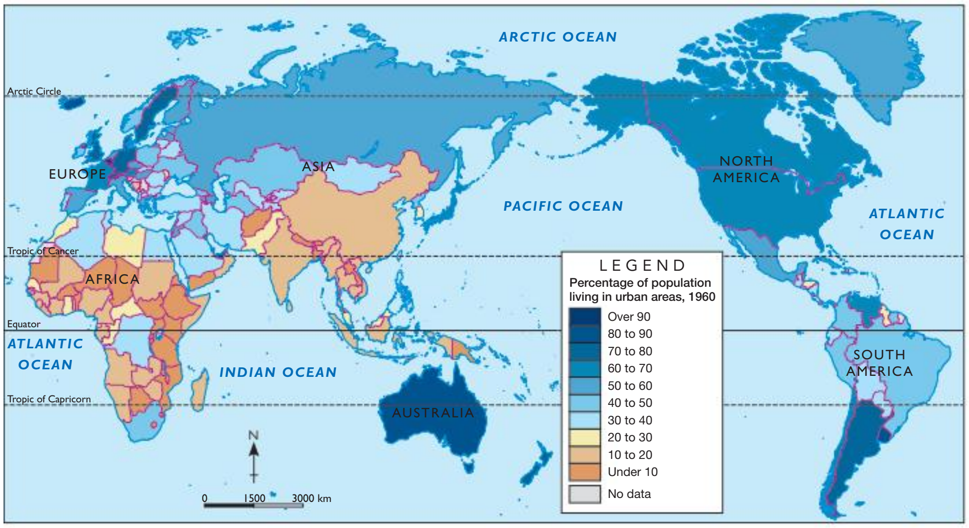
Source 1 Makako was once a small fishing village on a lagoon. It has now been swallowed by the population explosion of Lagos and is a slum, home to hundreds of thousands of people.



Source 2 The growth of population of Lagos, 1960–2030

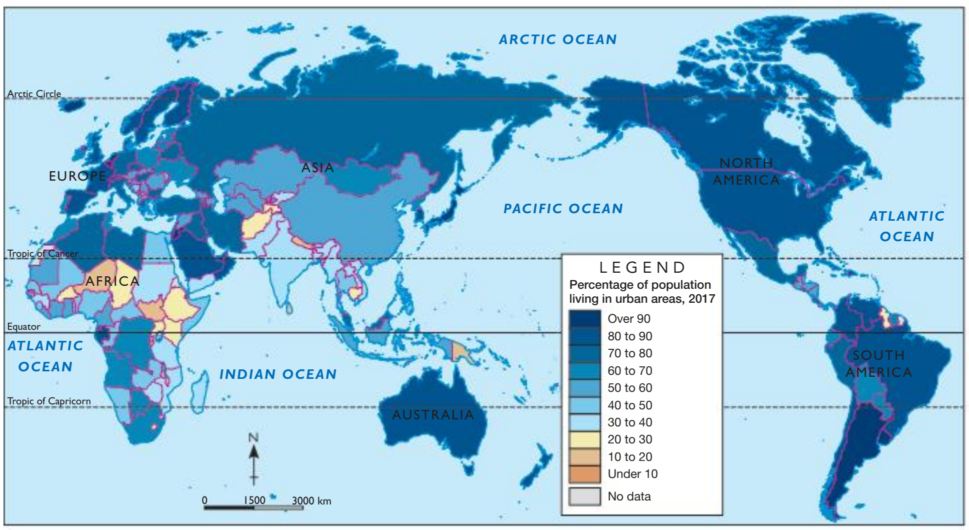
Key skill worksheet
Identifying patterns & relationships: Using maps to describe change

PERCENTAGE OF THE WORLD'S POPULATION LIVING IN URBAN AREAS IN 1960



Source 3 Source: Oxford University Press/Our World in Data

PERCENTAGE OF THE WORLD'S POPULATION LIVING IN URBAN AREAS IN 2017



Source 4 Source: Oxford University Press/Our World in Data

5.1 CHECK YOUR LEARNING

Review and understand

1 In your own words, **define** the following terms:
- urbanisation
- megacity
- infrastructure.

2 What has happened to the world's cities in the past 60 years?

Apply and analyse

3 **Examine** Sources 3 and 4.

a Using the PQE method (see page 26 of 'The geography toolkit'), describe the distribution of countries that have more than 60 per cent of their population in urban areas in 2017.

b How does this compare to the distribution of countries that have more than 60 per cent of their population in urban areas in 1960?

4 Using data from Source 2, **describe** the growth of the population of Lagos.

Evaluate and create

5 Imagine that you visited Makako in 1960. Sketch the scene in Source 1 as it might have appeared then, or write about your visit. A larger version of Source 1 is available on your obook pro.

5.2 The rise of the megacity

In this topic, you will:

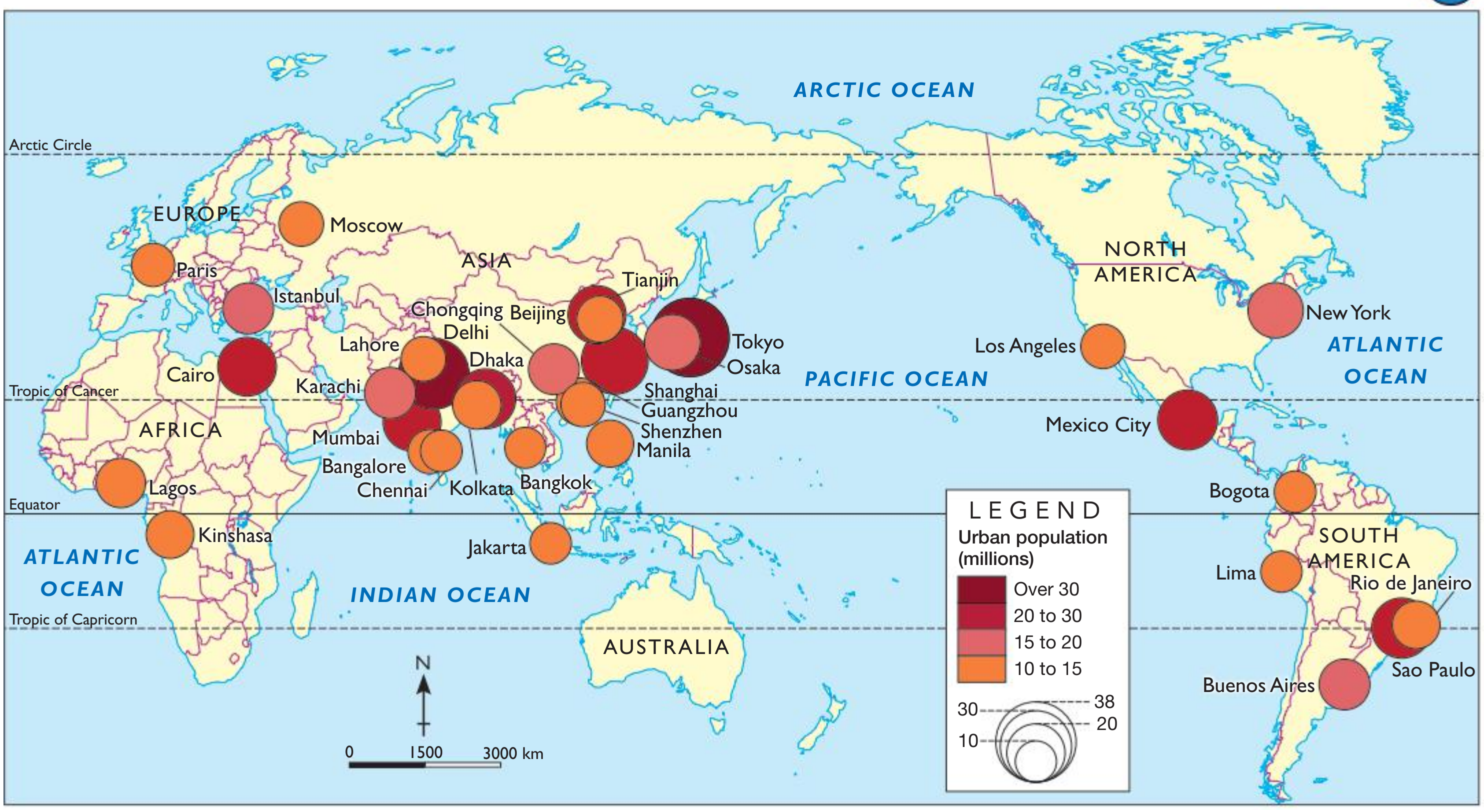
- explain the characteristics of megacities across the world
- describe the spatial distribution of megacities.

A century ago, only about 15 in every 100 people lived in cities. Today, that number is more than 50 in every 100. This increase has resulted in the creation and growth of many cities worldwide, and an explosion in the number of very large cities, known as megacities.

In addition to the increase in the number of megacities over the past century, there has been a change in where these cities are found. No longer do the megacities of Europe and North America dominate – instead, the megacities of Asia, South America and Africa are becoming the world's largest.

Four of the world's megacities are explored briefly in this topic. Although they are in different parts of the world and have many unique characteristics, they also face a lot of the same challenges and have more in common than you might first think.

WORLD: MEGACITIES

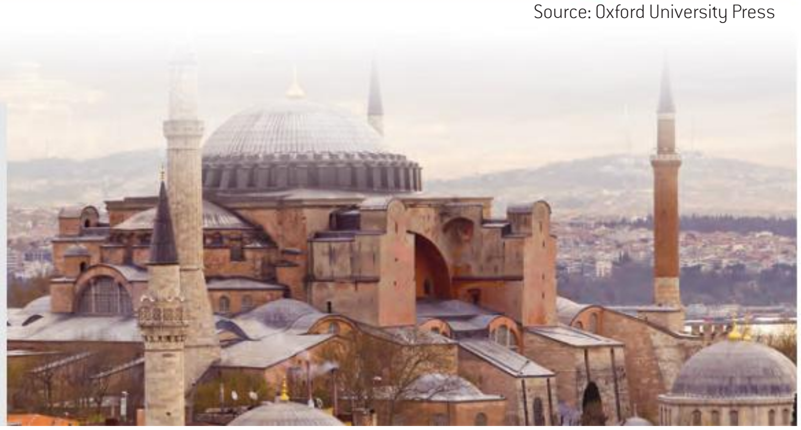


Source: Oxford University Press

Source 5

ISTANBUL: THE MEGACITY OF TWO CONTINENTS

One part of Istanbul lies in Europe and one part lies in Asia, making it the only city in the world to straddle two continents. It has been one of the most important cities in history, as it lies at an important crossroads for these two continents. It is also a popular tourist destination. Traffic congestion and pollution from cars are significant problems in Istanbul, as they are in many large cities.



Source 6 Istanbul

DELHI: THE WORLD'S FASTEST-GROWING MEGACITY

The population of Delhi has doubled in size this century. It has swelled by an average of 730 000 people a year for the past 20 years – that is an extra 83 people each hour! At this rate, Delhi will become the world's largest city by 2030, when it is predicted to be home to almost 39 million people. Its fertile soils and water, supplied from two rivers, make this is a suitable location for a city. Its rapid growth, however, has led to many issues, particularly air pollution, poor waste disposal and a public transport system struggling to cope with the demands of the population.

Source 7 Delhi

LIMA: THE NEWEST MEGACITY

It is difficult to know exactly when a rapidly growing city reaches a milestone, but geographers believe Lima's population passed the 10 million mark in about 2018. Lima sprawls from the Pacific coast to the Andes Mountains. Despite being in a desert, it has a mild climate and a supply of water from the River Rimac. However, rapid population growth has put this important resource under pressure, and many slum areas on the city's fringe now lack good access to safe water.

Source 9 Lima

NEW YORK: THE FIRST MEGACITY

In 1950, New York was the world's largest city and its only megacity. New York's outward growth has seen it take over many other cities on its fringes, making the region one of the world's largest cities in terms of land area. New York's location made it the first place to land for waves of migrants arriving in the United States from Europe for hundreds of years. Living in a city in a developed country, New Yorkers do not suffer the same levels of poverty and pollution as those living in other countries. In a recent survey, they listed the cost of living, availability of housing and crime rate as three issues they face.

Source 8 New York

5.2 CHECK YOUR LEARNING

Review and understand

1. **Identify** the number of megacities in the world.
2. **Identify** how many megacities there are in each of these continents: Asia, South America and Africa.

Apply and analyse

3. **Examine** Source 5. Using the PQE method (see page 26 of 'The geography toolkit'), describe the distribution of megacities throughout the world.
4. a **Describe** three problems faced by people living in megacities.
   b **Predict** which of these problems will become worse as the megacities grow.

Evaluate and create

5. Select one of the megacities shown on the map in Source 5 that has not been described in this topic. Using the internet, **research** this city. Find out about its location, history and any issues faced by the people who live there. Write a paragraph about this city, similar to those shown here. Include a picture.

5.3 Jakarta: Our closest megacity

In this topic, you will:

» explore the causes and consequences of urbanisation in Indonesia.

Indonesia's capital is a vast, sprawling megacity called Jakarta. The official population of Jakarta is almost 11 million, but if all the surrounding cities and settlements are included, the true population is closer to 36 million.

Jakarta is a very old city, having begun as a trading settlement over 1500 years ago. As the capital of Indonesia, Jakarta plays an important role in uniting the 267 million people of the country, which is the fourth most populous country in the world. The city is also responsible for about one-fifth of the country's economic activity. Jakarta's residents have an average income four times greater than other Indonesians, and this is one key reason why people choose to move there from rural areas.

Geography of Jakarta

Jakarta is located on the north-western coast of the island of Java. South of the city, a range of volcanoes and hilly slopes feed a series of rivers that have built up a fertile floodplain leading to the Java Sea. There are 13 rivers that flow through Jakarta. The combination of the flat, low-lying plain and the tropical climate means that flooding is a frequent problem for the residents of Jakarta. Like most places in Indonesia, Jakarta is also at risk from earthquakes.

Housing in Jakarta

kampong
an Indonesian word that means 'village'; it is also used to refer to slum areas in cities

Like many other Asian megacities, Jakarta is a place of contrasts. Slums sit alongside skyscrapers, modern homes and luxury hotels. Half of the population of Jakarta lives in these slums, which are known as **kampongs**. Houses in slums are often built from temporary materials on land considered unsuitable for regular housing. In the slums, running water, electricity and sanitation are difficult to obtain, as these areas do not have the same infrastructure as other parts of the city.

Source 10 A flooded kampong sits beside a mosque and new residential towers near the centre of Jakarta.

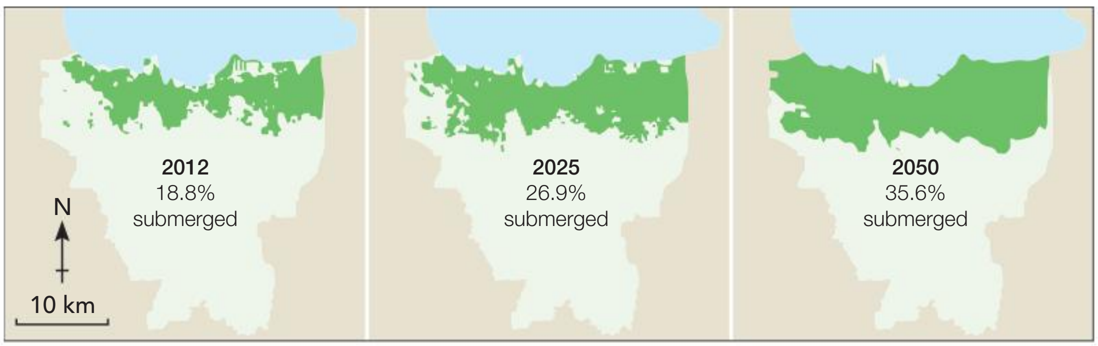
Issues in Jakarta

One of the biggest problems faced by the people of Jakarta is that the city is slowly sinking. This is because many homes – particularly those in the kampongs – do not have a steady water supply; and so to access fresh water, residents dig wells and take water from the **aquifer** that lies beneath the city. So much water has been taken out that the city is sinking – in some places, 10–20 centimetres per year.

As a result, floods are becoming more common. Almost half of Jakarta now sits below sea level. Heavy tropical rain swells the city's 13 rivers each year, bringing floods to the low-lying regions. In addition, rising sea levels are flooding parts of the city located on the coast of the Java Sea. Some experts predict that more than one-third of the city is at risk of being submerged by 2050 (see Source 11).

aquifer
layers of rock or soil in the ground that hold water or that water can pass through

AREAS OF JAKARTA AT RISK OF FLOODING AS SEA LEVELS RISE



Source: Oxford University Press/Bandung Institute of Technology

Source 11 Sinking Jakarta: more than a third of the Indonesian capital could be submerged by 2050, according to expert forecasts.

Key skill worksheet
Communicating & reflecting: Answering 'to what extent' questions

Responding to floods

A range of solutions have been proposed to try to reduce the risk of flooding in Jakarta. Kampongs built on riverbeds have been cleared out so that rivers can drain more quickly, and new channels have been built to drain water to the sea. To protect against the rising sea levels, sea walls have been constructed along the coast. However, these have been difficult to maintain and many are leaking.

In 2019, the President of Indonesia announced plans for a new capital city to be built on the Indonesian island of Borneo (see Source 21 on page 142). It is hoped that this new city will take the pressure off Jakarta and allow the growth of the city to slow down.

5.3 CHECK YOUR LEARNING

Review and understand

1 **Identify** one reason why people choose to live in Jakarta.
2 **Describe** one consequence of urbanisation in Jakarta.

Apply and analyse

3 **Describe** some of the natural features of Jakarta that have contributed to flooding.
4 **Explain** how human activities have contributed to flooding.

Evaluate and create

5 Use your field sketching skills (see Rich task 4C on pages 124 to 125) to sketch Source 10. (A larger version is available on your obook pro.) Label the following features on your sketch: apartment towers, mosque, kampong, flooded area, parkland.
6 'Poor people are often the most vulnerable in cities, and are more impacted by disasters than wealthier people.' **To what extent** do you agree with this statement – completely, somewhat or not at all? Use Source 10 to support your answer.

5.4 Urbanisation in Indonesia

In this topic, you will:

» explore the causes and consequences of urbanisation in Indonesia, including its social and economic advantages and environmental impacts.

As we have seen, in the past few decades, there has been an increase in the amount of the world's population living in cities. This change, along with its causes and consequences, is referred to as urbanisation. Changes in Indonesia's population have closely mirrored this global trend of city living (see Source 13). In the 1950s, only 15 per cent of Indonesians lived in urban areas, but by 1990, this proportion had doubled to 30 per cent. Today, more than half of Indonesia's residents live in cities and many of these cities (such as Jakarta) are struggling to cope with this rapid growth.

Causes of urbanisation

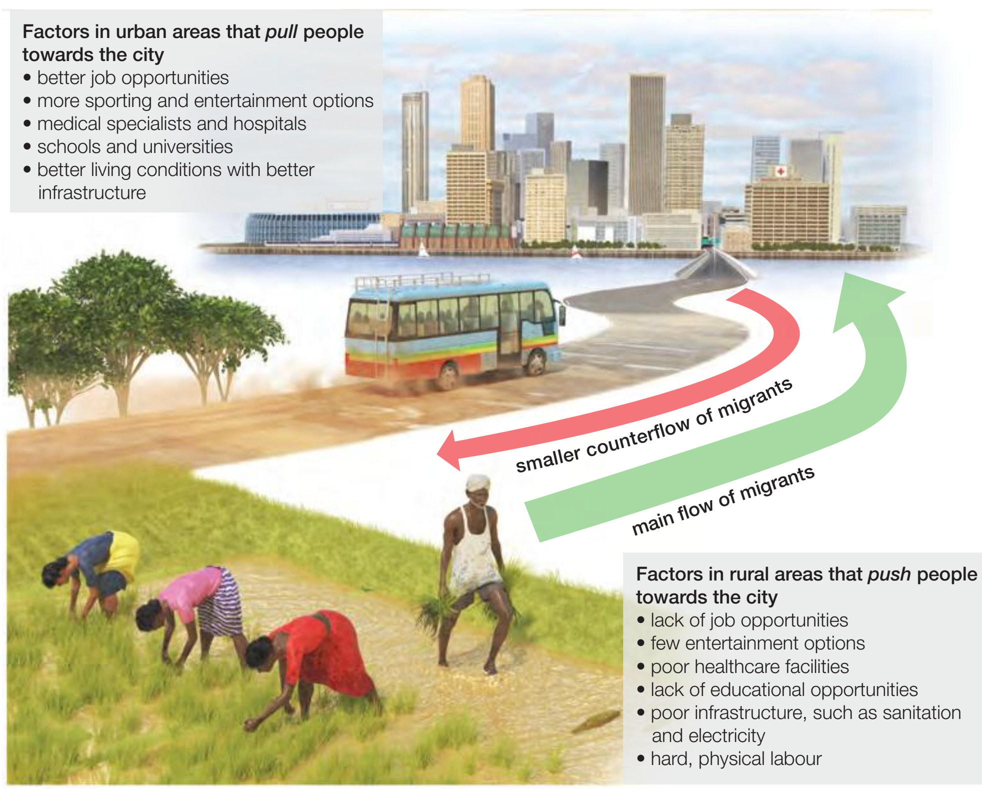
migration
movement of people to a new country or area

Watch it!
A video and quiz on push and pull factors

The main cause of urbanisation in Indonesia is the movement, or **migration**, of people from rural to urban areas. This is typical of the situation in many developing countries. To better understand this flow of people, a US geographer named Everett Lee developed a model of migration (see Source 12). He explained that there are both positive and negative factors of the place each migrant comes from (the origin) and the place each migrant is going to (the destination). Lee named the negative factors 'push factors', as they tend to push people away from a certain place. By contrast, he named the positive factors 'pull factors', as they tend to pull people towards a certain place.

Generally, every migrant believes that the place they are going to is better than the place they are leaving. However, not everyone who believes that better opportunities exist elsewhere will move; they may see certain obstacles to moving, such as family ties and moving costs. Furthermore, some migrants find that the new place does not give them everything they hoped for and so they return to where they came from. This is called counter-migration.

Source 12 Lee's migration model

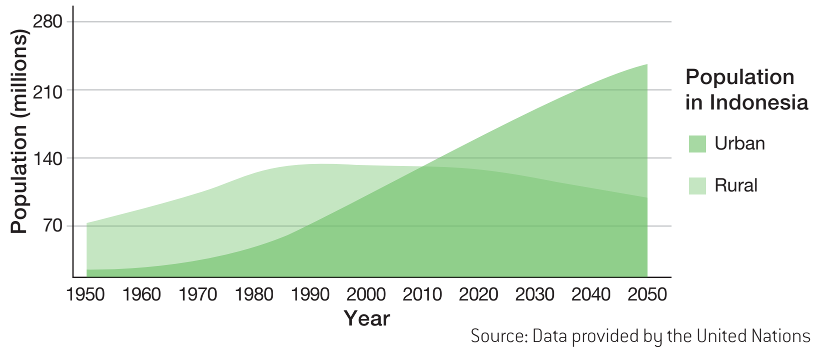


Consequences of urbanisation in Indonesia

Urbanisation in Indonesia's cities has led to many issues, including the following:

- *Inequalities between the rich and poor* – many of the rural migrants who settle in Indonesia's growing cities have trouble finding secure employment or housing. Indonesia is now the country with the sixth greatest **wealth inequality** in the world.
- *Strains on infrastructure* – public transportation, roads, water, sanitation and electricity networks are all under strain from the rapid influx of people to the cities. For example, the commute from Bekasi, a city less than 20 kilometres from Jakarta, takes around three hours. There are 5.4 million commuters travelling throughout Jakarta each day.
- *Potential food insecurity* – with young people leaving rural areas seeking better job opportunities in the city, there are not enough workers on farms to plant and harvest crops. This may lead to lack of **food security** in the future, where the population could suffer from reduced access to food and nutrition.

Despite the challenges caused by urbanisation, it also has the potential to bring new prosperity to a country. With more workers in the cities, factories can operate more efficiently and produce goods for **export**. In some countries, urbanisation has helped to lift millions of people out of poverty.



Source 13 Urban and rural population in Indonesia

wealth inequality
the unequal distribution of money and assets in a group of people

food security
a state where all people at all times have access to enough safe, nutritious food to sustain a healthy life

export
sending goods or services from one country to another for sale

5.4 CHECK YOUR LEARNING

Review and understand

1. In your own words, **define** 'urbanisation'.
2. In your own words, **define** 'migration'.
3. **Identify** three reasons why people move from rural areas to urban areas.

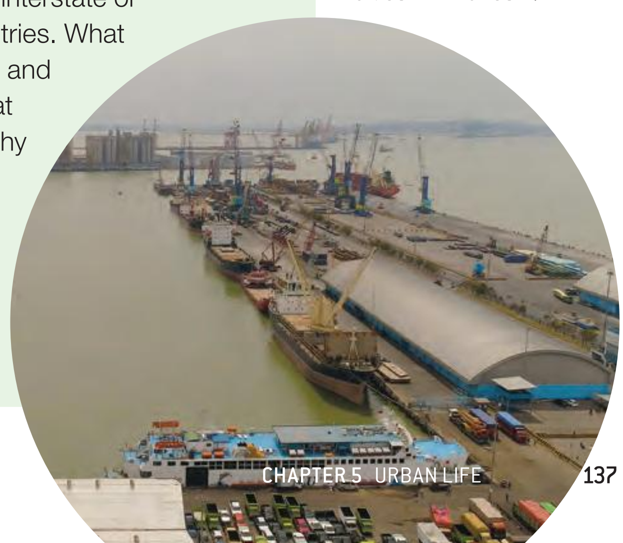
Apply and analyse

4. **Distinguish between** 'push factors' and 'pull factors'. Remember, when you distinguish between two things, you should talk about how they are different.
5. Using the data in Source 13:
   a. **describe** the change in Indonesia's population between 1950 and today.
   b. **predict** whether this trend is expected to continue into the future, and give reasons for your answer.

Evaluate and create

6. **Research** one of the consequences of urbanisation in Indonesia listed in this topic. Write a short paragraph explaining how this is affecting the people of Indonesia today.
7. Interview a person who has moved home – either interstate or between countries. What were the push and pull factors that help explain why they moved?

Source 14 Surabaya is Indonesia's second-largest city and is one of Asia's most important trading ports. It has been a trading centre for almost 1000 years, and is an important financial, commercial and entertainment hub. It is also known for being one of the cleanest and greenest cities in Indonesia.



5.5 The advantages of living in cities

In this topic, you will:

» examine the advantages of living in cities, including economic, social and environmental advantages.

As the world becomes more urbanised, geographers have identified the advantages and disadvantages of city living. These can be roughly divided into three categories: economic, social and environmental.

Economic advantages

Most cities today have strong infrastructure to support the large number of people who live there. This includes piped water, sewerage, electricity, communications, health care, education and public transport.

Because cities are home to so many people, they are an obvious location for companies to base their businesses. Cities provide a ready supply of both workers and customers. For this reason, cities generate 70 per cent of the world's income, despite being home to only 55 per cent of its population. Three-quarters of all jobs in Australia are based in our major cities, and the income generated in those cities accounts for around 80 per cent of our total economy.

KEY SKILL
Collecting & representing data

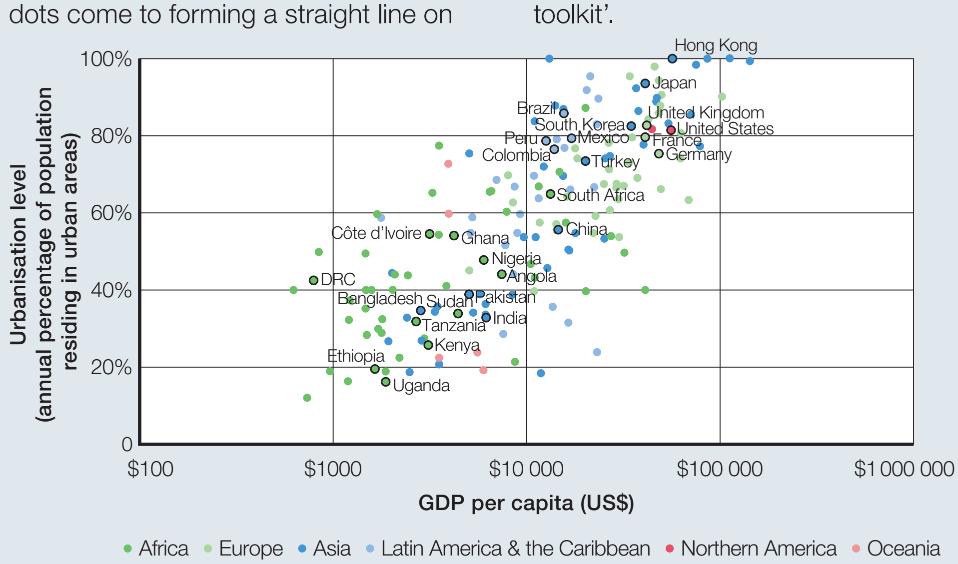
Key skill worksheet
Collecting & representing data: Reading a scatterplot

Reading a scatterplot

Scatterplots are useful tools for interpreting trends in data. Each point on a scatterplot has two coordinates: the *x* coordinate (on the horizontal axis) and the *y* coordinate (on the vertical axis). The point at which they intersect is represented by a dot. The closer the dots come to forming a straight line on the graph, the stronger the relationship is between the two variables.

The variables in Source 15 are the average income per person in selected countries (the horizontal axis) and the level of urbanisation in those countries (the vertical axis).

For more information on this key skill, refer to page 28 of 'The geography toolkit'.



Source: Data from Urban Age

Source 15 Urbanisation and average income. The dots for countries are labelled and have a black circle around them. The other dots represent cities.

Social advantages

Cities provide a range of social advantages, including access to schools, hospitals and other services, as well as non-essential services such as theatres, casinos, aquariums and major sporting events.

One of the main ways in which the populations of cities grow is through the arrival of people from overseas. For migrants, cities offer the best opportunities for employment, good access to government and support services (such as translators and community workers), and the best chance of making links with people from their own cultural and language backgrounds. Cities benefit from immigration, as it results in cultural diversity. This can often be seen in a range of shops, cultural organisations, restaurants and religious buildings, all of which help to make cities dynamic and vibrant places.

Source 16 Cities are meeting places for many cultures. Here, two Buddhist nuns record a multicultural celebration in Hobart, Tasmania.

Environmental advantages

Not all cities have environmental advantages, but well-designed and well-managed cities can reduce the impact of their people on the environment.

Four of the world's top five eco-friendly cities are in Europe: Copenhagen, Amsterdam, Stockholm and Berlin. In these cities, the government encourages people to use low-carbon transport options, such as bikes or simply walking. Waste-disposal services are used to convert household and factory waste to electricity, which reduces the amount of non-renewable resources used to create energy. Water is also collected and used sustainably.

The Government of South Australia has pledged to work towards a carbon-neutral Adelaide by 2050, to reduce the impact of climate change.

Source 17 Zurich's public transport system of trams, trains, boats and electric buses make it one of the most environmentally sustainable cities in the world.

5.5 CHECK YOUR LEARNING

Review and understand

1 **Identify** two economic advantages for people who live in cities.

2 Why are cities often multicultural places?

Apply and analyse

3 Examine Source 15.

a **Compare** (look at the similarities and differences between) the rate of urbanisation and income of people in Hong Kong with those in Ethiopia.

b **Identify** the region of the world that is the least urbanised.

c There is a trend in this scatterplot that shows that people in more urbanised countries have a greater-than-average income than those in less urbanised countries. **Explain** how we know this from reading Source 15.

4 **Suggest** one new strategy that could be put in place to make your state's capital more eco-friendly.

Evaluate and create

5 Can you think of disadvantages to living in cities? **Discuss** this with a partner and then with the class.

6 Many important inventions happened in cities. These include the internet, telephones, wi-fi, the bionic ear, plastic bank notes, computers, cameras and sewerage systems. **Research** one of these to find the inventor and the city where the invention occurred.

5.6 The disadvantages of living in cities

In this topic, you will:

- discuss the disadvantages of living in cities, including economic and social disadvantages
- examine the impact that urbanisation has on environmental quality.

While there are many advantages to city life, there are also a number of disadvantages. These can be roughly divided into three categories: economic, social and environmental.

Economic disadvantages

Cities can provide opportunities to generate wealth. However, geographers have found that it is residents with higher incomes who benefit from this most.

By contrast, many people find themselves experiencing poverty in cities. As a result, the world's city slums are growing. They are now home to about 900 million people, most of whom live in slums in Asia (530 million). Cities struggle to provide those in slums with jobs and basic services, such as water, housing and sanitation.

Social disadvantages

The social disadvantages faced by city-dwellers can vary widely from suburb to suburb, so one person's experience may be very different from another's. Overcrowding and rising house prices might be a disadvantage for those living in the inner city, while lack of schools and hospitals might be a disadvantage for those living in new housing estates on the edge of the city.

Most of these disadvantages are linked to competition for services. Because cities are home to large numbers of people concentrated in relatively small areas, services can be stretched beyond their limits.

Quiz me!
A quick quiz on the disadvantages of living cities

Source 18 Slums are often built on land that is vulnerable to disasters. In Rio de Janeiro, Brazil, the slums are built in the hills and ravines that surround the city.

Some of the problems most experienced by people living in cities include:

- traffic congestion – the result of too many people trying to use the roads at the same time
- rises in the cost of housing, food and utilities – the result of greater numbers of people competing for resources than can be supplied
- waiting times for schools, public transport and medical care – the result of more people trying to access these services than they were originally designed to serve
- rates of crime – the result of a complex combination of factors, including unemployment, cultural and economic background, age and gender.

Environmental disadvantages

The people, factories, cars and industries based in cities often pollute the air, water and soil. The goods and services needed by the residents of cities include food, water, electricity, petrol and gas. These often must be transported long distances, creating even more pollution. As cities grow in size, they place an enormous amount of stress on the natural environment around them (see Source 19).

To make room for cities to grow, forests and grasslands are cleared, lakes and wetlands are drained, and rivers are diverted or dammed. Soft earth is replaced with hard surfaces, such as footpaths and roads, to service the city. This often has serious consequences for native animal, plant and bird populations in the area.

Cities also consume a great deal of energy, which produces large amounts of carbon dioxide. In fact, cities produce about 75 per cent of the world's carbon dioxide, which contributes to climate change.

Source 19 Satellite images of Rio de Janeiro in 1975 (top) and 2014 (bottom); these images show urban expansion over the years. Urban areas are grey, while forested regions appear as green.

5.6 CHECK YOUR LEARNING

Review and understand

1 **Describe** one economic disadvantage of living in cities.

2 Why does traffic congestion commonly occur in large cities?

Apply and analyse

3 Source 18 shows a slum area in Rio de Janeiro.
 a **Identify** what type of geographical photo this is. Refer to page 15 of 'The geography toolkit' if you get stuck.
 b **Describe** the key differences between the slum (in the foreground) and the city (in the background).
 c **Explain** how slums develop in cities as a result of urbanisation.

4 Examine Source 19.
 a **Describe** the change in Rio de Janeiro between 1975 and 2014.
 b **Describe** the impact this change has had on the urban areas.

Evaluate and create

5 If new arrivals in cities face many difficulties, why do they keep coming? **Justify** (give reasons for) your answer.

6 The images in this topic show urban disadvantages in Brazil. Use your research skills to find images of urban problems in Australia, Indonesia, China or the United States. **Classify** the problems into these categories: social, economic or environmental. Give each image a caption. Use your images to create a display on your classroom wall.

5A

RICH TASK

Quizlet

Revise the key terms you have learnt so far.

Patterns of urbanisation

The growth of the world's cities has been one of the biggest changes in the way people live over the past 100 years or so. This change can be seen at a range of scales, from the global to the local.

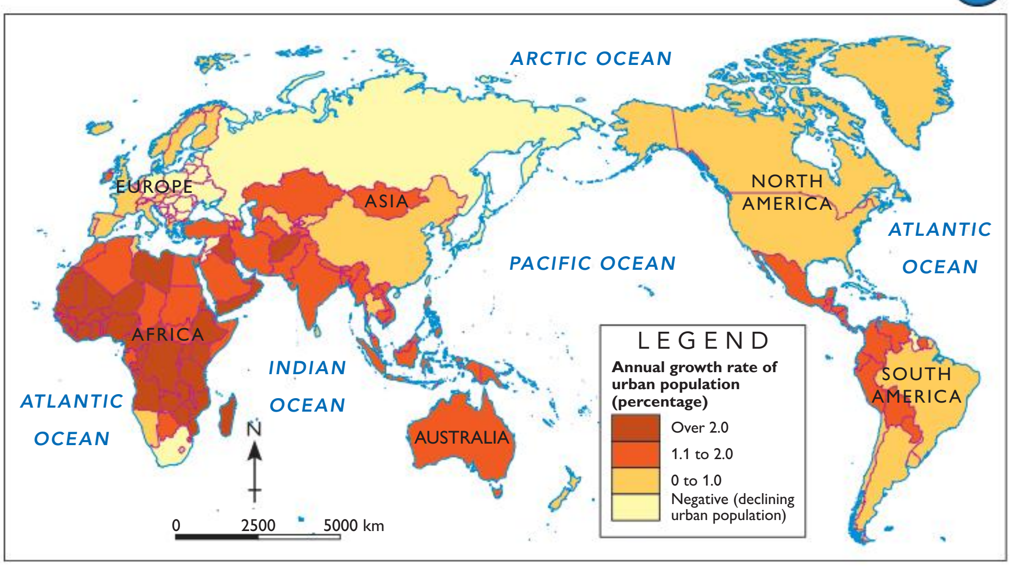
At the global scale, for example, we have seen the emergence of megacities. For some countries this has caused a decline in the overall rural population, which is a change at the national scale. And at the local scale, farmland has been converted into homes, particularly at the edges of cities.

POPULATION DENSITY IN INDONESIA

Source 20

Source: Oxford University Press

URBAN GROWTH AT THE GLOBAL SCALE



Source 21

Source: Oxford University Press

Source 22 Traffic congestion in the Tanah Abang district of Jakarta, Indonesia

KEY SKILL
Identifying patterns & relationships

Interpreting choropleth maps

The maps on these pages are choropleth maps. These maps give a quick impression of spatial patterns by using dark and light shades of the same or similar colours. Darker shades usually show 'the most' and lighter shades show 'the least'. To interpret a choropleth map, follow these steps:

Step 1 Read the title carefully, so you understand what is being shown on the map.

Step 2 Look carefully at the legend, so that you understand what the various shades and colours represent.

Step 3 Look for large areas of similar shades and for other patterns (such as lighter colours near the edges of a city and darker colours near the centre of a city).

Step 4 Describe the patterns that you find in a few carefully worded sentences.

Step 5 Look for any exceptions to the general pattern.

Step 6 Describe these exceptions in a carefully worded sentence.

For more information on this key skill, refer to page 26 of 'The geography toolkit'.

Practise the skill

1 **Examine** Source 20.
  a **Identify** the Indonesian island that is the most densely populated.
  b **Identify** the Indonesian island that is the least densely populated.
  c Are there any exceptions to the population density you identified in questions 1a and 1b? **Explain** your answer.
2 **Examine** Source 21.
  a **Describe** the purpose of this map.
  b **Identify** the continent with the highest annual growth rate.
  c Are there any exceptions to this, or does the whole continent show a high annual growth rate? Use the world map at the back of your book to list the areas where exceptions might occur.
  d **Identify** the continent where there are many countries with declining urban populations.
3 Use the information you have extracted from answering the first two questions to answer the following:
  a Use the PQE method to describe the distribution of population in Indonesia.
  b Use the PQE method to describe the distribution of urban growth around the world.

Refer to page 26 of 'The geography toolkit' to get you started.

Extend your understanding

Look closely at Source 20.

1 **Identify** the proposed location of Indonesia's new capital city.
2 **Describe** the location:
  a What are its geographical features?
  b What is its current population density?
3 Will the plan to add a new capital city increase or decrease the population density of this place? **Justify** (give reasons for) your answer.
4 **Research** this proposal. What are some of the main arguments supporting this proposal and what are some of the main arguments against it?

5.7 Australia's cities

In this topic, you will:

» explain why Australians live where they do.

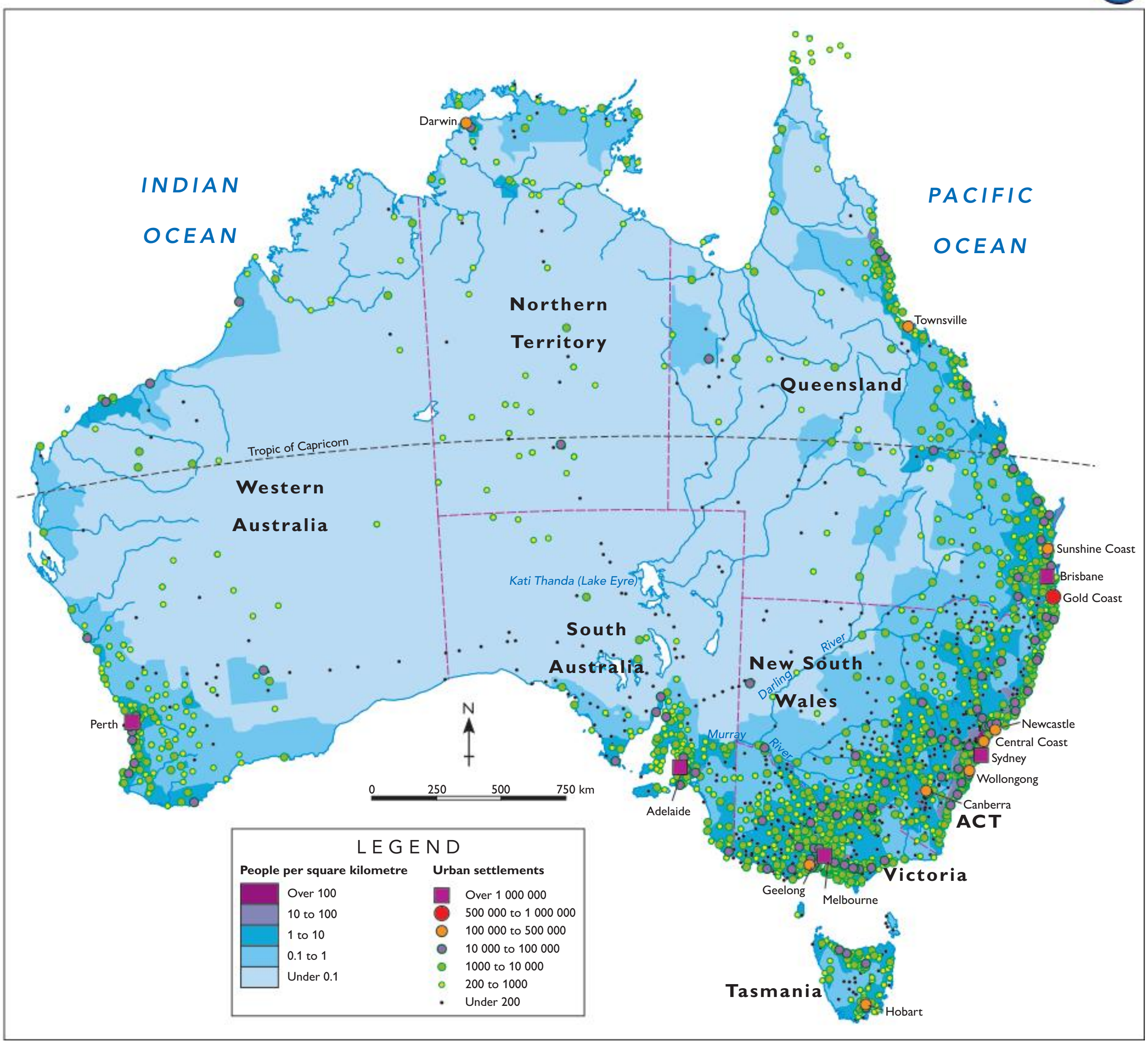
Key skill worksheet
Analysing maps: Reading dot distribution maps

Australia is one of the world's most urbanised countries. Around 90 per cent of us are packed into cities, but cities occupy just 0.2 per cent of our land. In every state and territory, well over half of the population lives in the capital city. Each year, these cities continue to grow (see Source 3).

Why Australians live where they do

As in other countries around the world, in Australia the economic pull of the large cities is attracting more people to them. A major push factor in rural areas is the limited access to education opportunities, and many young people move to capital cities to attend university. According to the Regional Universities Network, around 74 per cent of them remain in cities when their courses finish.

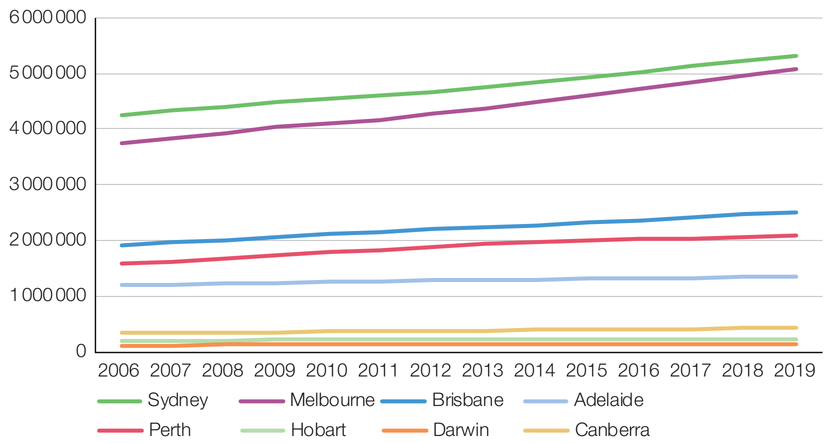
AUSTRALIA: POPULATION DENSITY AND DISTRIBUTION, 2016



Source 1

Source: Oxford University Press

Migrants, too, are more likely to settle in our capital cities. For many newly arrived migrants, their first experience of Australia will be a new home in a large city. Cities offer access to government support services and good job opportunities. Since the 1940s, just under half of all migrants to Australia have settled in Sydney and Melbourne.



Source 2 Population of Australia's capital cities, 2006–19 Source: Data from .id

Source 3 Melbourne's Central Business District is the most densely populated suburb in Australia. There are more than 20 000 people in each square kilometre, most of them in apartment buildings.

Growing cities

Today, most of the growth in Australia's large cities occurs on the edges of cities. Land there is generally cheaper than land closer to the centre of the city, and is therefore attractive to people who wish to build a new home. Young families, particularly migrant families, tend to be drawn to the affordable housing in these areas. Property developers purchase land from farmers, build infrastructure such as roads and shopping centres, and divide the land into blocks to sell to new home builders. This process is known as **suburbanisation**.

As land is developed in this way, the city gradually grows outwards. Suburbanisation places a strain on city infrastructure, such as public transport and roads. In Melbourne, nearly 10 per cent of all peak-hour commuters travel on overcrowded trains. On the roads, the average commute time is around 65 minutes.

suburbanisation the process of growing cities outwards by building new housing estates and businesses away from the Central Business District

5.7 CHECK YOUR LEARNING

Review and understand

1 Where do most Australians live?
2 In your own words, **define** 'suburbanisation'.

Apply and analyse

3 **Explain** why cities grow outwards as their populations increase.
4 Look closely at Source 1.
  a What type of map is this?
  b **Identify** the urban settlements with more than 1 million people.
  c Use the PQE method (see page 26 of 'The geography toolkit') to **describe** the distribution of population in Australia.
5 **Examine** Source 2.
  a **Identify** Australia's largest city.
  b **Identify** Australia's fastest-growing city.
  c Using data from the graph, **compare** the population growth in Melbourne and Sydney. Remember, when you compare two things, you should talk about their similarities and their differences.
6 **Explain** how growth can create difficulties in urban areas. Use examples to support your answer.

Evaluate and create

7 In a 200-word paragraph, **discuss** the advantages that Australia has as a nation with a largely urbanised population.

5.8 Why Australians live in cities

In this topic, you will:

» explore what causes Australians to live where they do, including the role of the environment, historic factors, and trade and transport networks.

Quiz me!
A quick quiz on why Australians live in cities

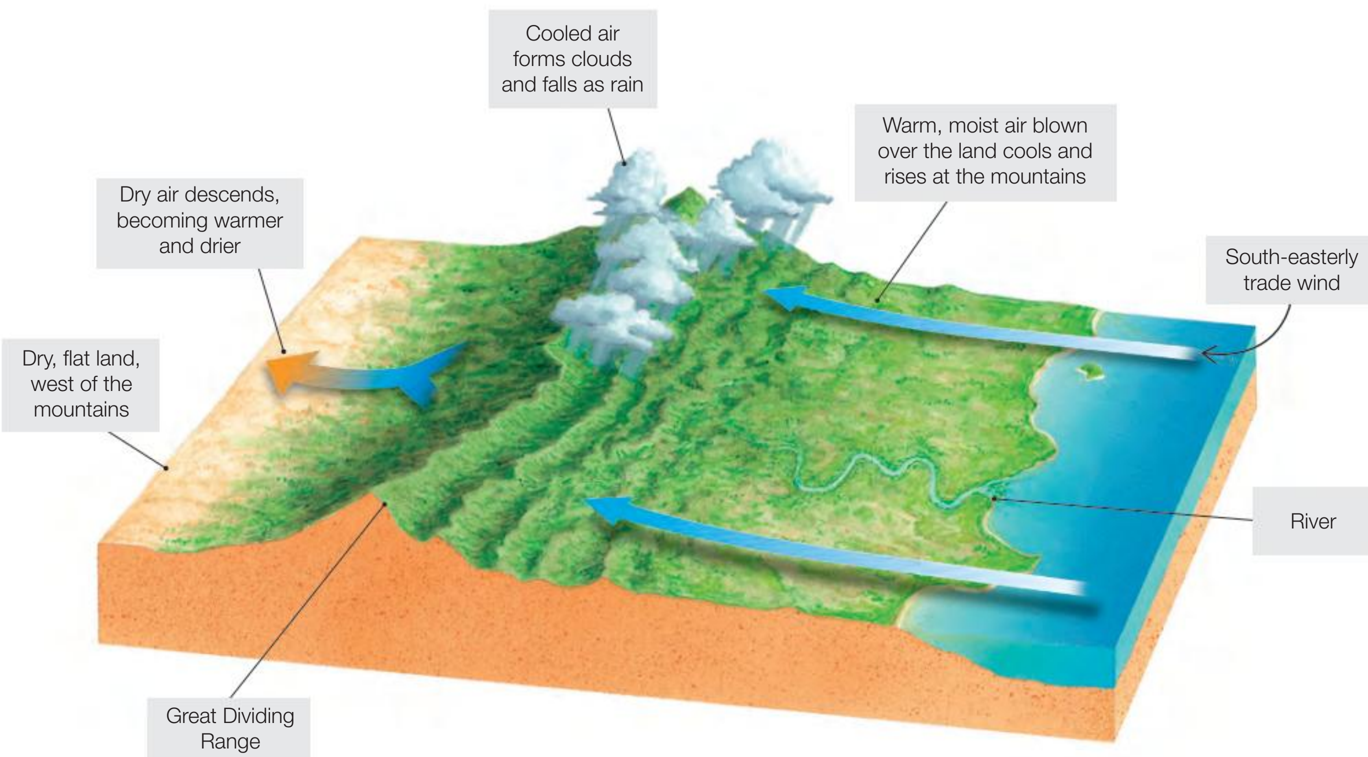
There are many reasons why Australians tend to live in cities. These reasons can roughly be divided into three categories: environmental factors, historic factors, and factors relating to trade and transport networks.

Environmental factors

Australia's geographical features and different climate zones (see Source 5) play a major role in where Australians choose to live.

Places that receive the highest and most reliable rainfall are the most populated. These regions are found in the south-east of the country, to the east of a mountain range known as the Great Dividing Range. This mountain range stretches from Cape York Peninsula in the north of Queensland to the Grampians in western Victoria.

The Great Dividing Range has a major impact on the climate along the east coast of Australia. Rain falls on the eastern side of the range. It fills hundreds of rivers that run eastward to the coast. These rivers supply fresh water for drinking, food production, hydroelectricity, industry and transport. Most Australians live in coastal towns and cities near the mouths of these rivers. On the western side of the range, most of the land is dry and flat. As a result, this area is much less populated.



Source 4 The influence of the Great Dividing Range on Australia's climate

Historic factors

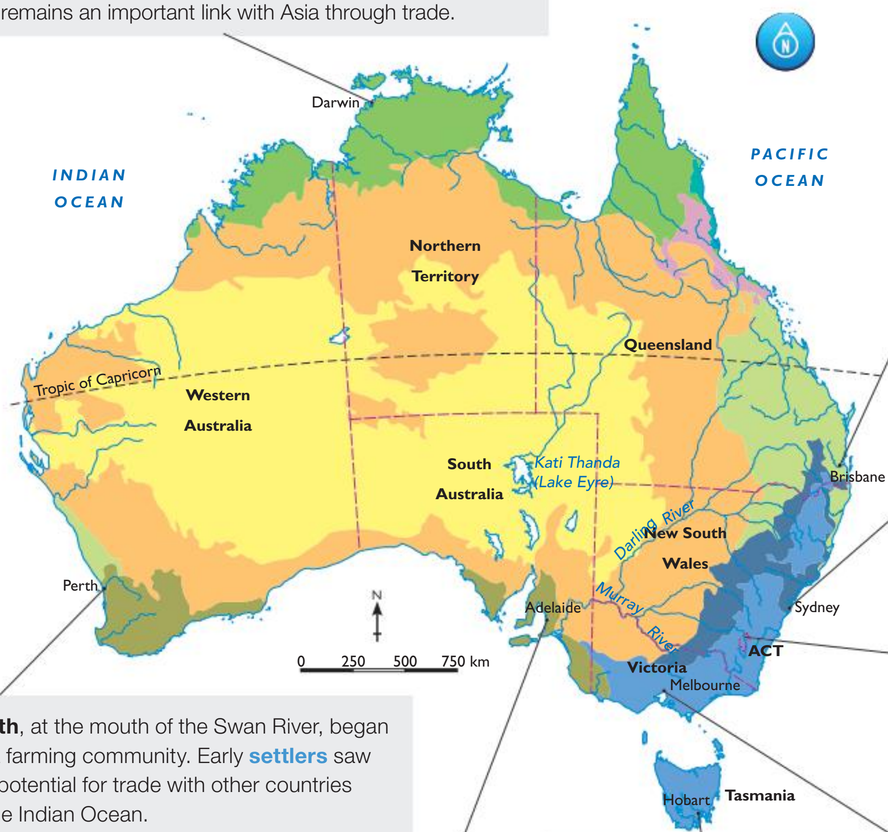
Prior to the arrival of European colonists, there were hundreds of Aboriginal nations and language groups that lived throughout Australia. When European colonists arrived by sea in 1788, they looked for land that was most suitable for farming and the building of towns. Places at the mouths of rivers provided them with fresh water and flat, fertile land (see Source 5). Apart from Canberra, all our capital cities were built by European colonists arriving by sea.

colony
a country or area under the control of another country, and occupied by people from that country

settler
a person who leaves their homeland by choice to settle in a new country or colony

The site of **Darwin** was chosen as the location of the end of the communications cable that connects Australia to Java and then to Europe. It lies near the mouth of the Elizabeth River and remains an important link with Asia through trade.

Brisbane lies at the mouth of the Brisbane River. Originally settled as a place for the worst of the convicts from Sydney, it became the centre of an important farming district due to the fertile soils and reliable rains in surrounding areas. Brisbane is home to the third largest container port in Australia, and is also an important tourist hub.



Sydney is Australia's first city. Founded on a huge natural harbour at the mouth of several rivers, it was chosen as the site of a British penal **colony**. The first convicts arrived in 1788. It is home to Australia's busiest airport and second busiest container port.

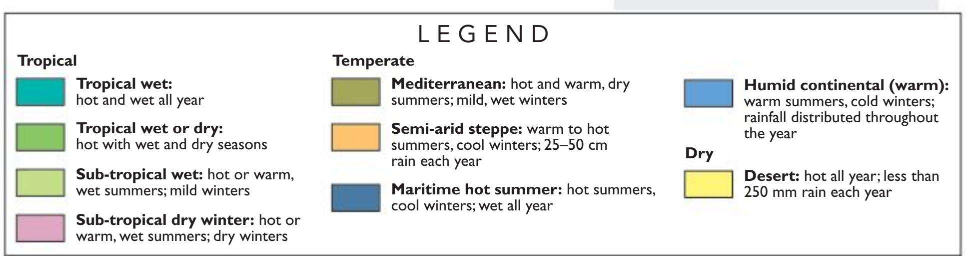
Perth, at the mouth of the Swan River, began as a farming community. Early **settlers** saw the potential for trade with other countries in the Indian Ocean.

Canberra's location was chosen as the site of Australia's national capital in 1908. It lies on the Molonglo River and has grown to become Australia's largest inland city.

Adelaide was built on the rich soil near the mouth of the Torrens River. Like Canberra, it was a planned city. Land was sold to English settlers before they arrived in Australia.

Hobart lies at the mouth of the Derwent River. It was founded as the second prison colony in Australia, and for a while it was Australia's main whaling port.

Melbourne was founded at the mouth of the Yarra River by farmers looking for fertile land and fresh water. It has grown to become Australia's second largest city and home to the country's busiest container port.



Source 5 Australia's climate zones and state capital cities

Trade and transport networks

Australia is a trading nation. Much of our wealth comes from selling goods to people in other countries. Some of our largest exports are minerals, including iron ore, coal and gas; and farm products, such as beef and wheat. All these products leave Australia by ship. We also import goods from other countries. Some of our biggest imports are machinery, fuel, and vehicles from manufacturers in other countries. This means that ports are important parts of Australia's infrastructure. Our largest ports are located in our cities.

5.8 CHECK YOUR LEARNING

Review and understand

1 Name four of Australia's biggest cities.

2 **List** three ways in which water has influenced where people in Australia live.

3 **Describe** the influence of the Great Dividing Range on Australia's climate.

Apply and analyse

4 **Explain** how our present way of life reflects decisions made hundreds of years ago.

5 a **Identify** two common features shared by most of our capital cities.

b **Explain** what is unique about the location of Canberra.

6 **Examine** Source 5.

a Which climate zone is common to three of Australia's state capitals?

b Use this map to **explain** why so few Australians live in the interior of the country.

Evaluate and create

7 Long before European colonists arrived, the areas that became our major cities already had names and significance to Aboriginal peoples. **Research** to find out the Aboriginal place names of our capital cities and share your findings with the class.

Source 6 Australia's busiest container port is in the centre of Melbourne.

5.9 America's cities

In this topic, you will:

» describe urban settlement patterns in the United States.

KEY CONCEPT
Space

megalopolis
a collection of large cities that are close together, and are so closely linked that they effectively form one continuous urban area

Like Australia, the United States is one of the world's most urbanised countries. More than 80 per cent of its population live in cities. There are now more than 300 cities in the United States that have a population greater than 100 000. More than 50 of these have populations greater than 1 million.

BosNYWash

In the north-east United States, several major cities and smaller surrounding areas have grown so large that they have begun to merge into one continuous urban area. The major cities in this area are Boston, New York, Washington and Philadelphia.

The area is known as the Northeast Megalopolis, but is commonly referred to as 'BosNYWash'. Between 2010 and 2019, the population in this area grew by about 6 million people, and currently has around 50 million residents. Geographers predict that by 2025, the area will be home to 58.1 million people.

For more information on this key concept, see page 7 of 'The geography toolkit'.

American cities

There are usually three distinct parts to US cities:

- the city centre (usually referred to as 'downtown')
- the suburbs
- the exurbs.

Downtown

Downtown is often the place where the city was first settled. Land in the city centre is generally very expensive, so buildings tend to be tall rather than wide. These include towering residential apartment buildings. Downtown areas typically have many high-rise buildings that contain the offices of large companies. In Los Angeles (see Source 7), this is reflected in the demographic of people who live there. Of the 60 000 or so residents of downtown Los Angeles, just under 25 000 of them are office workers.

Source 7 Downtown Los Angeles; Los Angeles is America's second-largest city, home to almost 13 million people

Quiz me!
A quick quiz on America's cities

Suburbs

Typically, beyond the city centre lies a large area of residential housing. This area is known as the suburbs. In many US cities, the suburbs grew rapidly from the 1950s onwards. In this period, people moved out of apartment buildings downtown and built free-standing houses on the city's edges.

The first suburban community in the US was built in 1946 in Long Island, New York. One man purchased many acres of land, subdivided it into lots and built homes on them. This is the same model of suburbanisation we see today on the outskirts of cities around the world. The suburbs are now home to well over half of those who live in US cities.

urban sprawl
the growth of a city onto productive farmland on the city fringes

Exurbs

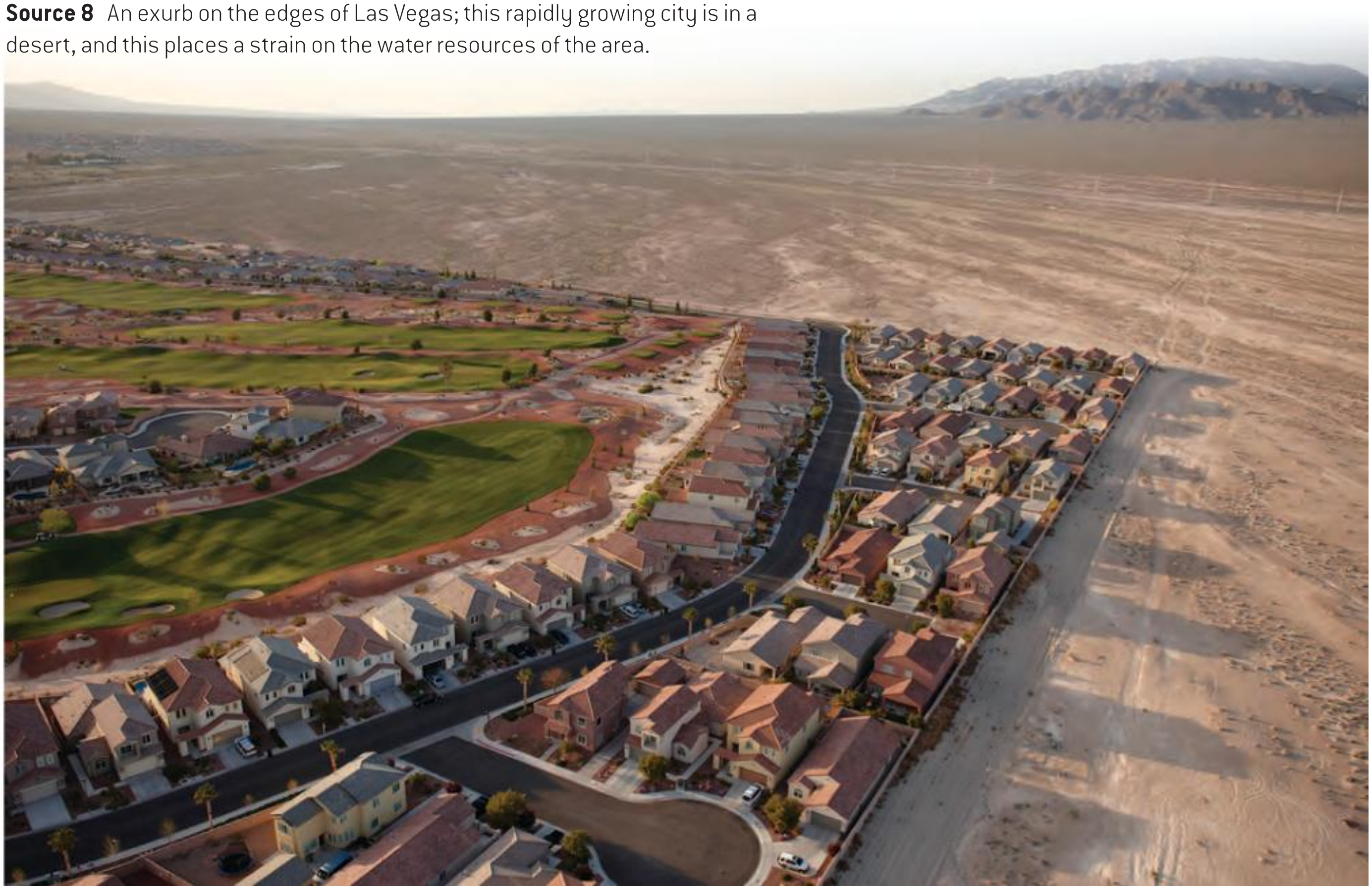
The exurbs are areas that are separated from the suburbs, but connected to them by road and rail networks. Between exurbs and the city are farmland and open spaces. The people who live there usually commute into the city for work. For this reason, the exurbs are sometimes also called 'dormitory suburbs'.

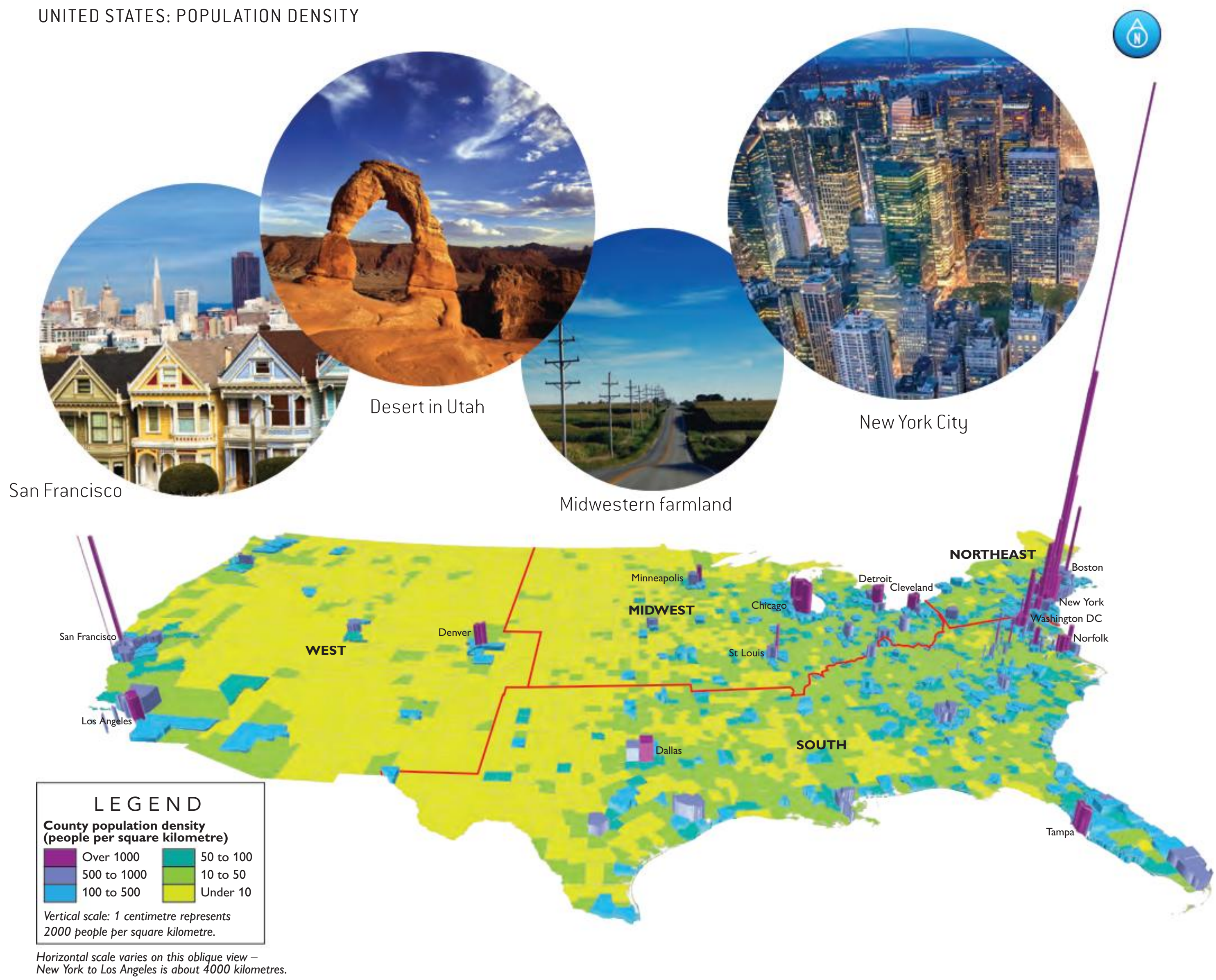
Over time, as suburbs and exurbs grow, they may join together and increase the overall size of a city. Geographers refer to this expansion as **urban sprawl**. The United States is home to some of the world's most sprawling cities.

One of the biggest factors that contributes to urban sprawl is access to car ownership. Cars allow those people who live in the suburbs or exurbs to commute to work in the city centre more safely and easily than they could in the past.

See, think, wonder
Look at Source 8.
- What do you see?
- What do you think?
- What do you wonder?

Source 8 An exurb on the edges of Las Vegas; this rapidly growing city is in a desert, and this places a strain on the water resources of the area.





Source 9 United States: Population density

Source: Oxford University Press

5.9 CHECK YOUR LEARNING

Review and understand

1 **Identify** the three main parts of American cities.

2 In your own words, **define** ‘megalopolis’.

Apply and analyse

3 **Distinguish between** the suburbs and the exurbs. Remember, when you distinguish between two things, you should talk about how they are different.

4 **Examine** Source 9.

- a **Identify** the areas of the United States that are the most densely populated.
- b **Identify** the areas that are the least densely populated.
- c **Compare** the distribution of population in the United States to the distribution of population in Australia (see Source 2 on page 144). In what ways are they similar, and in what ways are they different?

Evaluate and create

5 Suggest four natural and human factors that have contributed to the growth of America’s cities. **Justify** (give reasons for) your answer.

5.10 Why Americans live in cities

In this topic, you will:

» explore what causes Americans to live where they do, including the role of climate, and transport networks.

Quiz me!
A quick quiz on why Americans live in cities

America's population of 328 million people is not distributed evenly. Some parts of the country are dominated by enormous, crowded cities and large towns that, together, are home to tens of millions of people, while other parts are vast areas of wilderness where virtually no one lives. This is because people usually live in places that supply their basic needs – food, water and shelter. In the United States, the most densely populated places tend to share the same features:

- a temperate climate (one that is not too cold or too hot)
- reliable rainfall and rivers to supply fresh water
- fertile soils for growing crops
- links to other cities by transport networks
- closeness to the coast.

The role of climate

The United States is the world's fourth largest country. It extends almost from the tropics in the south to the Arctic Circle in the north. This gives it a wide range of climates. In winter, snow can blanket northern cities, such as New York and Chicago. In summer, it can be extremely hot and humid in southern cities, such as Atlanta and Austin. Temperatures tend to vary between the south and the north, while the amount of rainfall tends to vary from the east to the west (see Source 12 on page 154).

Source 10 The climate of Florida, in the south, is warm and tropical. Some of the state's cities, such as Miami, are among the fastest growing in the United States.

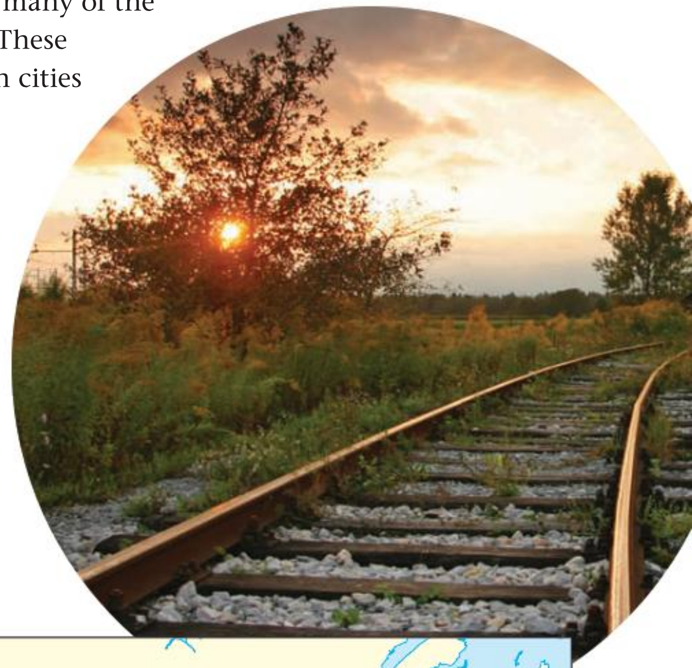
Transport networks

The distribution of cities throughout the United States is partly a reflection of the **Industrial Revolution**. The Industrial Revolution began in Britain, around 1760. During this period, new machineries, power sources and ways of organising work greatly changed all aspects of life.

Industrial Revolution a period of major change in the late 1700s and early 1800s, where industries were revolutionised by the use of machinery

Arriving in America, early British settlers brought with them many of the new technological methods that had radically changed Britain. These included improvements in farming that allowed people to live in cities rather than in rural places where food was grown.

One of the most significant developments was the ability to build train networks. The first railways were built in the early 1800s in the America's north-east. This was the point of arrival for many European migrants, and gave them access to travel. By 1850, there were 14 000 kilometres of train tracks in different parts of the country. In 1869, the first track was built across the country. Towns developed around train lines, at railroad junctions and at the end of the lines in many areas. Many of these are now the nation's largest cities, including New York, Chicago and Los Angeles.

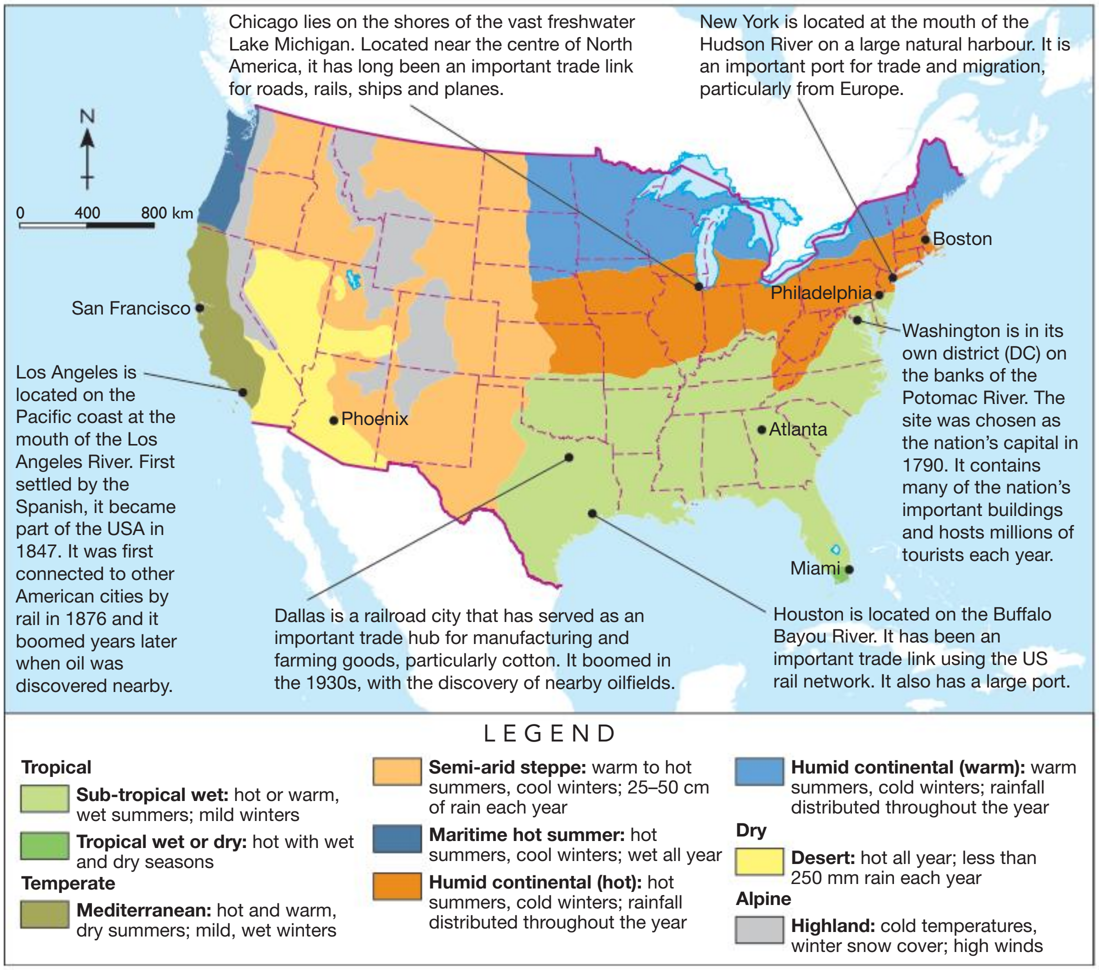


UNITED STATES: RAILROADS BUILT IN THE LATE 1800S

Source: Oxford University Press/National Geographic

Source 11 Between 1870 and 1890 the amount of railroad track in the United States tripled, linking together small towns and helping them grow into huge cities.

UNITED STATES: CLIMATE ZONES



Source 12 Source: Oxford University Press

5.10 CHECK YOUR LEARNING

Review and understand

1 How did railways affect the growth of cities in the United States?

2 **List** the five factors that the most densely populated places in the United States have in common.

3 **Identify** one reason why there are such different climates in different parts of the United States.

Apply and analyse

4 Look closely at Source 12.

a **Identify** the type of climate that three of America's largest cities have in common.

b **Describe** some of the common features of these cities.

5 **Compare** Source 12 with Source 5 on page 151 by answering the following questions:

a **Identify** the climate in the areas with the highest population densities.

b **Explain** why the population may be highest in these areas.

c **Identify** the climate in the areas with the lowest population densities.

d **Explain** why the population may be lowest in these areas.

Evaluate and create

6 a Do you think climate has influenced where towns and cities have developed in the United States? **Justify** (give reasons for) your answer.

b In what ways is this similar to the settlement pattern of towns and cities in Australia?

7 Source 12 includes a description of America's six largest cities. The next six largest are also labelled on the map. Select one of these and **research** its location and history. Write your own label for this city, to be added to the map.

5.11 New York: America's megacity

In this topic, you will:

» explore the living conditions in New York City, a megacity in the United States.

New York is the largest city in the United States and was the world's first megacity. For much of the twentieth century, it was the largest city in the world.

New York is made up of five areas known as boroughs. These boroughs are Manhattan, the Bronx, Queens, Brooklyn and Staten Island. Houses in Queens and Staten Island are similar to those in Australian suburbs. However, in the other three boroughs, almost everyone lives in apartments.

Manhattan, in particular, is one of the most densely populated places on Earth. It has a population of more than 1.5 million people in an area of less than 60 square kilometres. This is a **population density** of about 27 000 people per square kilometre. The overall population density of all five boroughs of New York, however, is around 10 500 people per square kilometre. When you compare this with Sydney – which has a population density of 2000 people per square kilometre – you get an idea of just how many people there are in New York. They literally live on top of one another!

Apartment buildings dominate the skyline in New York. Each floor of an apartment building is commonly divided into four to six apartments. A typical New York apartment is about 21 square metres in area, but this varies widely depending on the apartment blocks themselves and their location. About half of all New Yorkers own their own apartment, and the other half rent. There is often a convenience store at ground level in the building and a subway station nearby. For many New Yorkers, the corner coffee shop is an important meeting place because their apartments are too small for entertaining.

population density
a measurement of the number of individuals per unit area (e.g. 1500 people per square kilometre)

Source 13 This oblique aerial photograph shows part of Manhattan in New York. In the foreground are apartment buildings in an area known as Central Park West; in the middle ground is Central Park; and in the background is the Upper East Side.

CASE STUDY

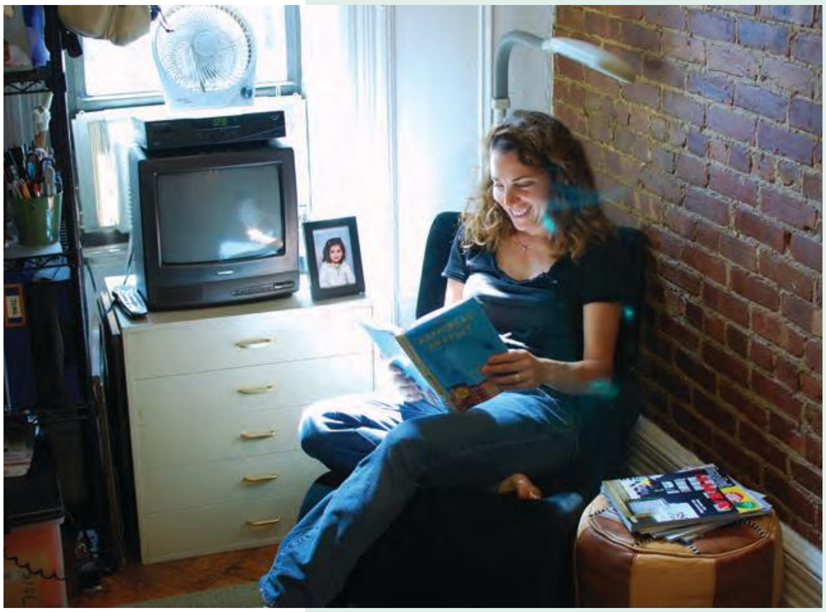
The smallest apartment in New York?

Felice Cohen pays US$800 per month to live in a tiny, 8-square-metre apartment in a building on the Upper West Side of Manhattan. Cohen has transformed the studio apartment, which resembles a wardrobe more than a traditional living space, to accommodate her with all the features of a typical home.

Cohen's bed is on a loft that sits above the front door. She climbs a ladder to get into the bed, which is so close to the ceiling that she cannot sit upright when she is in it. This saves her additional space on the floor, where her office, closet, bathroom and kitchen are all located close to each other.

The kitchen consists of a mini fridge, toaster oven, electric hot plate and two shelves full of pantry staples. Just a few centimetres to the right of the kitchen is Cohen's office. This includes a computer, desk and a chair that tucks neatly underneath the desk when she is not using it.

As of August 2021, the average price for a one-bedroom apartment in the Upper West Side is US$2550 per month. Like Cohen, many residents of New York's Upper West Side choose to live in tiny apartments in order to enjoy the lifestyle that the neighbourhood offers.



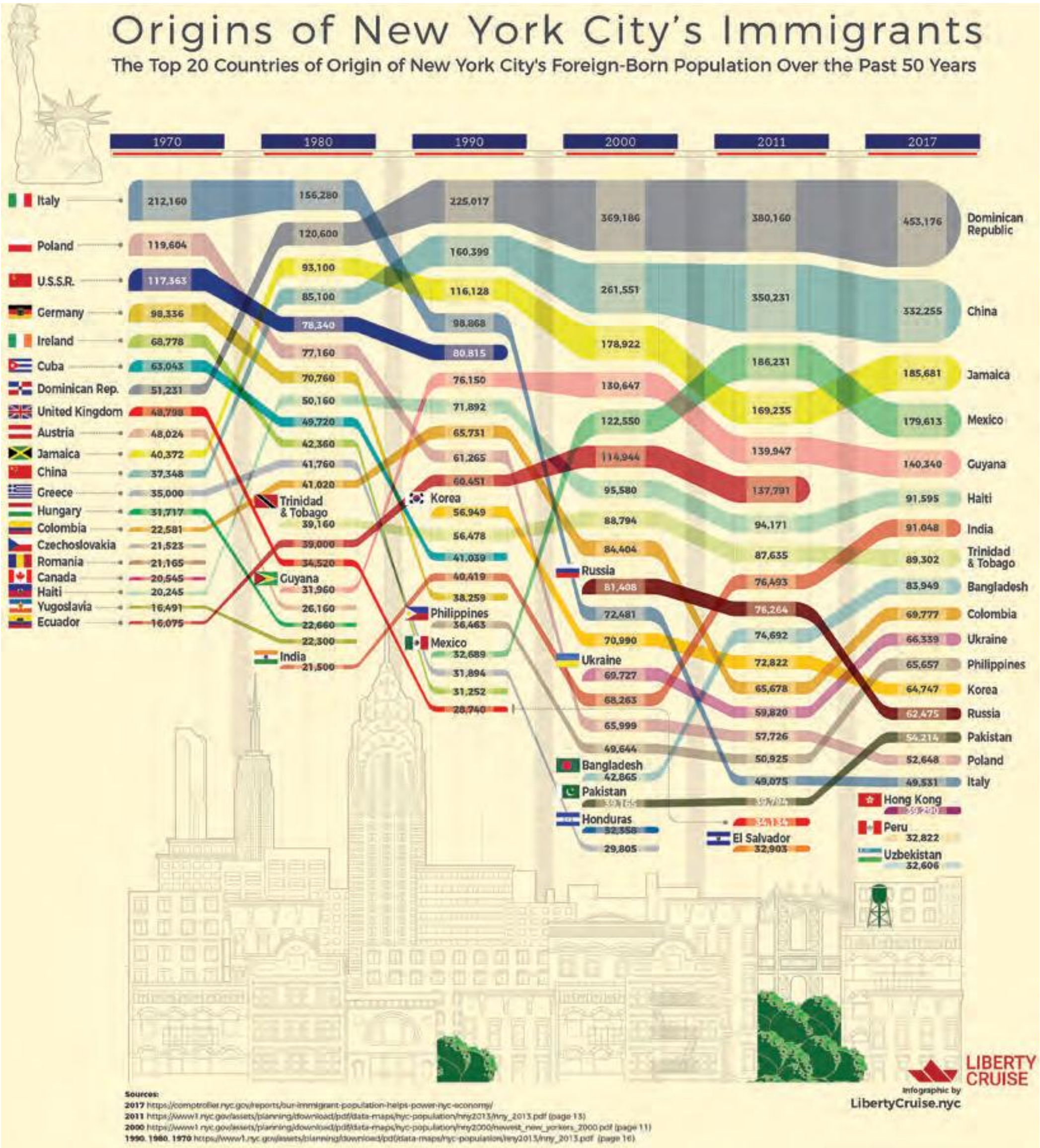
Source 14 Is this the smallest apartment in New York? Felice Cohen's living space is so small that she can open the front door while stting on the toilet!

The impact of migration

New York, like many Australian cities, has been shaped by migration. Waves of migrants – many of them escaping trouble in their home country – have travelled to New York in search for a better future. Some of the most notable of these waves have been:

- Irish immigrants escaping a collapse in their food security, known as the 'Great Potato Famine' (1840s)
- Jewish people from Eastern Europe fleeing persecution (1880s to 1920s) – by the mid-1920s, New York was home to nearly 2 million Jews
- Italian people, many of whom were landless farmers escaping poverty (1800s to 1950s)
- freed slaves and their ancestors from the southern states of America (1915 to 1960s)
- people from Central American and Caribbean countries such as the Dominican Republic and Mexico (1970s onwards).

A recent dominant wave has been the outward flow of migrants from New York to other states. This includes neighbouring states, such as New Jersey, but also the so-called 'sun belt', which includes warmer states such as Florida and California.



Source 15 Origins of migrants to New York, 1970–2017

Blackline master (BLM)
Outline map: the world – blank

5.11 CHECK YOUR LEARNING

Review and understand

1. List the five boroughs of New York City.
2. **Describe** how the lack of space in Manhattan affects the way people live.

Apply and analyse

3. a **Explain** the difference between the population density of New York and Sydney.
   b What impact do you think this difference has on the lives of people living in New York?
4. **Examine** Source 15.
   a What changes have occurred in the number of migrants from the Dominican Republic since 1970?
   b **Compare** this to the number of migrants from Italy. Do the changes in number follow a similar or different trend?
   c **Propose** one reason for the difference that you identified in question 4b.
5. Locate and label the countries listed in Source 15 on a blank map of the world (one has been provided for you in your obook pro).
   a On each country, record the number of migrants from that country who arrived in New York in 2017.
   b Do most migrants come from countries close to America or from distant countries?

5B
RICH TASK

Quizlet
Revise the key terms you have learnt so far.

The growth of Washington DC

Washington DC is the capital of the United States. Unlike most other cities in the world, it was a planned city.

Shortly after the United States was created as a country in 1776, it was decided that the nation's capital should not be a part of a state, but should be in its own district (the District of Columbia, or DC as it is known). The states of Maryland and Virginia each donated a piece of land on their border for the new capital. It was designed as a square city, 16 kilometres (10 miles) long on each side, on the banks of the Potomac River. Since that time, Washington has expanded beyond these borders, and now spills into its neighbouring states.

As the nation's capital, Washington contains many buildings of national significance. Millions of visitors come to Washington each year to see these buildings and other important landmarks.

Source 16 Visitors at the Lincoln Memorial, Washington DC

KEY SKILL
Collecting & representing data

Creating column and line graphs

Graphs are used in geography to display data and make it easier to understand. Raw data often appears as a confusing table of numbers, so turning data into graphs makes it easier to recognise and analyse trends and patterns. Some commonly used graphs in geography are:

- column graphs – used to compare data (for example, the sizes of several cities)
- line graphs – used to show trends over time (for example, the growth of a city's population).

To draw a graph, you should follow these steps:

Step 1 Decide whether a column graph or line graph will best suit your purpose.

Step 2 Examine the data carefully to decide on the axes and the scale you should use so that all the data fits. It is important that the scale on each axis is an even scale; for example, 3 centimetres equals 1 million people.

Step 3 Construct your axes and your scale using a ruler.

Step 4 Plot the data carefully. Use a straight, horizontal line for a column graph. Use a small, neat dot for a line graph.

Step 5 On a column graph, draw a series of columns that extend to the horizontal axis. Lightly shade each column with a coloured pencil. On a line graph, join the dots with a smooth, freehand line.

Step 6 Label each axis with a description of the data, and give your completed graph a title.

For more information on this key skill, refer to page 28 of 'The geography toolkit'.

Practise the skill

1 Using the data provided in Sources 17 and 18, **create** two different types of graphs:

- **a** a line graph showing the growth of the population of Washington DC, 1950–2020
- **b** a column graph showing the numbers of visitors to Washington's top tourist attractions.

Extend your understanding

1 Study your completed line graph.

- **a** **Describe** the changes in the population of Washington between 1950 and 2020.
- **b** **Predict** what you think will happen to Washington's population in the next 20 years.

Year	Population
1950	1 298 000
1960	1 823 000
1970	2 488 000
1980	2 777 000
1990	3 376 000
2000	3 949 000
2010	4 604 000
2020	5 322 000

Source 17 Population of Washington DC, 1950–2020

Tourist attraction	Number of visitors each year (millions)
Lincoln Memorial	7.96
National Air and Space Museum	7.12
National Museum of Natural History	6.10
Vietnam Veterans Memorial	5.07
National Gallery of Art	5.00

Source 18 Washington's five most popular tourist attractions.

Source: Washington Business Journal

5.12 Forecasting urban growth in Australia

In this topic, you will:

- » discuss the challenges of planning for Australia's urban future
- » examine the forecasts for the size of Australia's major cities.

Map it!
ABS predictions for the population of Australia's capital cities in 2050

Geographers are interested in predicting the future. One of the most important predictions concerns the growth of our population. So how do we make predictions about population changes? Geographers generally rely on three methods:

- *Examining past trends* – geographers examine past trends, particularly ones that have occurred recently. For example, the fastest-growing cities of the last five years are likely to continue to be the fastest-growing cities in the next five years. Source 1 shows the predicted population of Australia's largest cities by 2050. This prediction is based on the idea that current trends, such as the number of babies born and the number of migrants arriving in Australia, will continue at the same rate.
- *Relying on the data* – geographers rely on the best data from reliable sources. Every five years, the Australian Bureau of Statistics (ABS) completes a census of Australia's population. This is a very accurate snapshot of how many people are living in different parts of Australia, and also contains a great deal of other data. Between the census years, the ABS provides annual predictions of the population.
- *Allowing for uncertainty* – geographers allow for uncertainty. Unpredictable events occur, which means their predictions may change. The COVID-19 pandemic, for example, slowed migration to Australia significantly for many months. This cut off the country's main source of population growth.

ABS PREDICTIONS FOR THE POPULATION OF AUSTRALIA'S CAPITAL CITIES IN 2050

Source 1

Source: Oxford University Press/ABS

Forecasting urban growth

Today, Australia's population is around 25.5 million. The ABS predicts that Australia's population will reach about 40 million by 2050. Most of this growth is likely to occur in our capital cities. This puts many pressures on governments and councils, which are in charge of planning and building new services to serve new residents.

By 2050, it has been estimated that Australia will need a further:

- 6.9 million homes (an 82 per cent increase from today)
- 173 348 kilometres of new roads (a 51 per cent increase from today)
- thousands of new services, including 3254 new schools, 1370 new supermarkets and 1370 new cinema screens.

Expanding cities also create environmental issues. Clearing land to build new homes and suburbs damages the natural environment, and negatively impacts on plant and animal populations.

Source 2 Is the future of Australia's cities? This artist's rendition of a new inner-city Melbourne suburb looks more like a science fiction fantasy than reality.

Future Melbourne

Future developments in technology will help to shape our cities and the way we live. Changing technology will mean that more of us will work and study from home in the future. Many predict that a full-time, onsite workforce will never be the same as it was before the COVID-19 pandemic, when around 32 per cent of working Australians moved to work from home.

This may help take the pressure off our busy city roads. Melbourne City Councillor Jackie Watts suggests that technology will have developed so much by 2036 that driverless cars, personal drones and delivery robots will be a part of life in Melbourne.

Climate change will increase our exposure to hazards such as bushfires and heatwaves. Good city planning will take these dangers into account. The City of Melbourne has developed the Climate Change Mitigation Strategy to 2050. The aim of the strategy is to change the ways in which we produce energy and dispose of waste, as well as invest in urban forests, green buildings and better cycling infrastructure.

5.12 CHECK YOUR LEARNING

Review and understand

1 **Identify** the three methods geographers rely on to help predict the future population.

2 What is a census?

3 **List** the major changes that are predicted for Australia's population by 2050.

Apply and analyse

4 **Explain** why it is important for communities to know about future population changes.

5 Look closely at Source 1.
   - a **Identify** the capital city expected to grow the most by 2050.
   - b **Propose** (put forward) three key services and infrastructure improvements that this city will need to meet the needs of this growing population.
   - c **Rank** the capital cities from largest to smallest in 2050.

Evaluate and create

6 Australia's population is ageing as well as growing. This means that older people will make up a greater share of the population in the future. How do you think this trend might influence city planning in the future?

7 In pairs, **discuss** how an unpredictable event, such as the COVID-19 pandemic, can impact on geographers' ability to predict the future population. Share your answers with the class.

5.13 Managing urban growth in Australia

In this topic, you will:

» investigate ways of managing the projected growth in Australia's urban centres, including suburbanisation, urban renewal and decentralisation.

Governments are responsible for managing the growth of Australia's cities. They employ urban planners to help them make decisions that allow our cities to grow.

There are three main strategies that planners use to manage the growth of cities: suburbanisation, decentralisation and urban renewal.

Suburbanisation

Suburbanisation is the process of making land on the outskirts of cities available for new suburbs to be built. In Australia, this has been the preferred strategy of growing our cities since they were founded. In new suburbs, residents can build a large home with a backyard, once referred to as the 'Australian Dream'. Industries can also be attracted to new suburbs by the more affordable land and rent that they offer.

However, there are some disadvantages to this strategy. Councils may find it difficult to provide new infrastructure to service new suburbs. This includes important services such as schools, roads and hospitals.

There are also environmental costs with this strategy. The land cleared for new suburbs impacts on the plants and animals in the area. In addition, residents in new suburbs often rely on cars because of infrequent or unreliable public transport. As a result, the daily commute into the city causes more pollution.

Source 3 A new suburb on the fringe of Brisbane; Brisbane is one of Australia's most suburbanised cities.

Decentralisation

decentralisation
the process of encouraging population growth and job creation in suburbs and smaller regional towns or cities, rather than in central areas of major cities

Decentralisation is the process of encouraging population and job creation outside the Central Business Districts of major cities. The Australian Government supports the growth of smaller towns and cities. One of the key methods they use is to move jobs and businesses from the Central Business Districts of the big cities into regional areas.

For example, the federal government offers regional visas for migrants to work and settle in rural areas. As a result, many regional towns are experiencing a surge in new residents. Like all changes, there are advantages and disadvantages to this strategy. This is discussed in greater detail in topic 5.14 on page 164.

Urban renewal

Urban renewal is the process of taking existing areas that are no longer in use within a city's boundaries and redeveloping them. In many large cities, there are areas of unused land or buildings. This happens for a variety of reasons; for example, schools close, quarries are no longer needed, or businesses move. It provides planners with the opportunity to develop housing areas for new residents, and offices for businesses, and green spaces for leisure.

One of the advantages of urban renewal is that it uses existing infrastructure, such as transport routes, energy supply and telecommunications. By doing so, it has the potential to reduce the sprawl of the outer suburbs.

One disadvantage is that it changes the character of the inner suburbs. As buildings are redeveloped and thousands of new residents arrive, existing residents may feel that the liveability of their area is reduced. A sharp increase in population numbers can also put pressure on the services that already exist in the area.

urban renewal
the process of taking areas of land in a city that are no longer being used and redeveloping them

Worksheet
Docklands

5.13 CHECK YOUR LEARNING

Review and understand

1 **Describe** the role of an urban planner.
2 **List** two advantages and two disadvantages of suburbanisation.

Apply and analyse

3 **Distinguish between** suburbanisation and decentralisation.
4 a **Describe** the change between the two photographs in Source 4. Use specific examples from the images.
b **Explain** how the change in the Docklands is an example of urban renewal.

Evaluate and create

5 **Research** an example of three management strategies in a major city near you. Create a PowerPoint or Prezi presentation displaying how these strategies have been put into place.

Source 4 Australia's largest urban renewal project to date is the Docklands area of inner Melbourne. Once Melbourne's main port, the land became vacant and unused (top) when the port operations were moved further down the river. Now it is home to more than 13 000 people and many businesses (bottom).

5.14 Arguments for and against decentralisation

In this topic, you will:

- explore the arguments for and against decentralisation.

As we saw in topic 5.13 on page 162, decentralisation involves encouraging the growth of regional towns and cities to help slow the spread of large cities. Industries and companies are given financial benefits to encourage them to move their operations from capital cities to regional centres. This has become the preferred strategy for many of Australia's governments, and is changing the face of many of our smaller cities and towns.

In 2020, changes brought about by the COVID-19 pandemic gave this strategy an unexpected boost. Many workers throughout Australia discovered that they preferred working remotely from home, rather than commuting to an office in the CBD, or another workplace. Many also became concerned about the way a virus such as COVID-19 can spread rapidly in a densely populated city. These social changes renewed an interest in moving to regional areas. As a result, many such areas experienced a surge in demand for homes.

Source 5 Regional towns such as Daylesford in Victoria experienced a growth in population during the COVID-19 pandemic.

Benefits of decentralisation

Decentralisation of the population can help relieve some of the problems of large cities, such as the cost of housing, traffic congestion and damage to the natural environment. There are also many advantages for the regional cities that are expected to grow because of decentralisation.

The spike in population helps boost the economy in regional towns. Businesses have new customers and new employees, and this in turn creates even more business opportunities. As new residents build homes, they spend money in the local area, including paying rates to the local council. This money can be used by the council to improve the liveability of the area, through building new infrastructure that benefits all residents of the town.

As the population grows in these areas, it also brings with it social changes. This includes the diversification of cultural and ethnic groups. A survey conducted by Charles Sturt University found that a warm welcome from the locals was one of the most important factors for migrants settling in regional and rural Australia. According to this survey, two in three migrants said that their regional community had made them feel very welcome.

Disadvantages of decentralisation

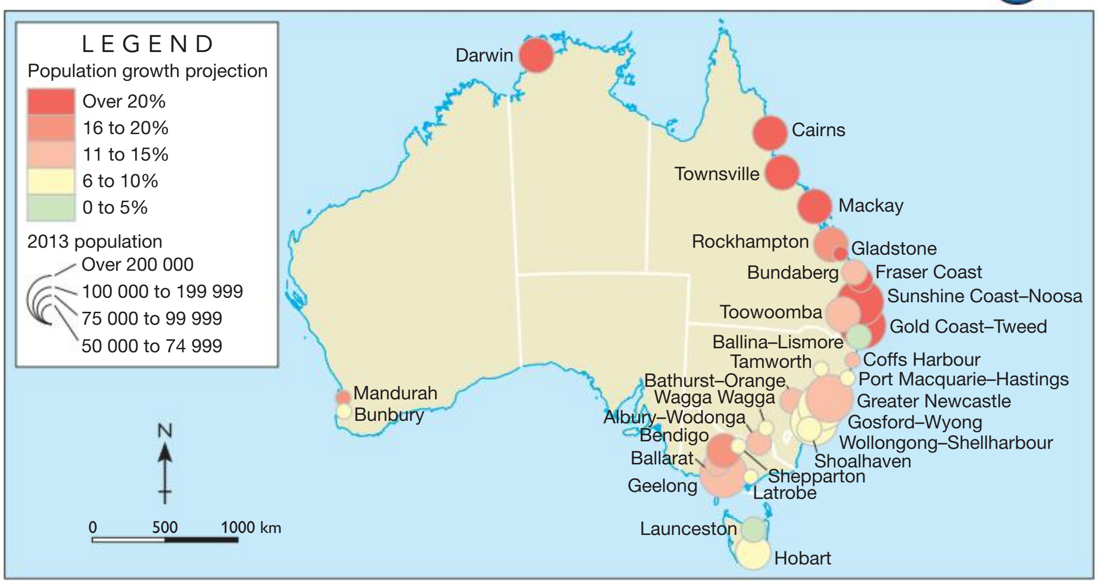
Some people who live in regional Australia are concerned that a surge in population will change their towns and cities forever. Geographers predict that property prices will rise as the demand for new homes increases. We can already see this happening in many towns near large mines, where the number of workers overwhelm the supply of housing in the towns. In the Central Highlands Region of Queensland, house prices jumped more than 30 per cent between 2018 and 2019. As a result, locals who have lived in the area for a long time are finding it difficult to afford their rent or to buy a new home.

Also, while regional areas can be enhanced by their new residents, some locals believe that they should have more of a say in how resources are spent on issues that directly affect them.

Further, it can often be difficult and expensive to get companies and workers to move to regional centres in the numbers necessary to make government incentive and development programs a success.

Source 6 The population growth rate of Cairns, in Far North Queensland, is larger than Australia's overall growth rate.

2013 POPULATION OF AUSTRALIA'S REGIONAL CITIES AND PROJECTED GROWTH RATE TO 2026



Source 7

Source: Oxford University Press/Regional Australia Institute

Quiz me!
A quick quiz on arguments for and against decentralisation

5.14 CHECK YOUR LEARNING

Review and understand

1 Why do many people move from big cities to regional cities in Australia?

2 What are the benefits of this movement for the regional cities themselves?

Apply and analyse

3 **Examine** Source 7.

a **Identify** Australia's largest regional city.

b Using the scale on the map, **estimate** the distance between Australia's largest regional city and smallest regional city.

c In which state is regional city growth most rapid?

d **Identify** the regional cities that are projected to grow most rapidly.

e Using the PQE method (see page 26 of 'The geography toolkit'), **describe** the distribution of Australia's regional cities.

Evaluate and create

4 a Cairns is growing rapidly. **Identify** one problem this might cause in the city.

b **Propose** one strategy that could be put in place to help overcome the issue you identified in part a.

c **Evaluate** your strategy. What are its strengths and what are its weaknesses?

5 Design an advertisement that encourages people to move from large cities to regional areas. Your advertisement should focus on both push and pull factors (see topic 5.4 on page 136).

5C
RICH TASK

Quizlet
Revise the key terms you have learnt so far.

Canberra – a decentralised city

In 1911, the Australian Government announced a competition to design a new city located between Melbourne and Sydney. The winners were Chicago architects Marion Griffin and her husband, Walter Burley Griffin.

Their design involved a series of geometric shapes that would line up with important features of the natural environment, such as the surrounding hilltops. The plan also included a central lake that now bears the name Lake Burley Griffin.

Canberra is organised into a series of seven residential districts. Each district contains a mixture of town centres, local suburbs and industrial areas. The layout of these districts – around a series of central shopping and town centres linked by freeways – is designed to make them self-sufficient. It also prevents the mass-commuting of workers into the CBD every day, as is the case in all of Australia's other major cities.


Source 8 Parliament House in Canberra

KEY SKILL
Intrepreting geographical images

Comparing vertical aerial images

A range of sources used by geographers – such as maps, plans and photographs – are drawn or captured from directly above. In a vertical aerial photograph, the camera is positioned directly above the landscape (often from a drone or aeroplane). Vertical aerial images can be a useful tool for examining a small area of the Earth's surface in detail. This vertical view allows geographers to see the extent of any features and patterns they make on the Earth's surface. Most importantly, comparing these sources helps geographers identify any changes that have taken place over time.

When comparing vertical aerial images, follow these steps.

Step 1 Examine the scale and the legend of both sources. Ideally, these will be the same. If they are not, make sure that the area on one image corresponds exactly to the same area on the other image.

Step 2 Look for geographical features, such as the outline of lakes, the location of streets, and landmarks such as railway stations. This allows you to compare other features in the landscape.

Step 3 Locate features that appear on both images that are similar. Take note of these.

Step 4 Locate features that appear on both images that are different. Take note of these.

Step 5 Prepare a list or table of these similarities and differences, and try to explain the different reasons for them. You may need to conduct more research at this point in order to do this.

For more information on this key skill, refer to page 15 of 'The geography toolkit'.

Practise the skill

1 Look closely at the Griffins' plan for Canberra (Source 9).
   a **Identify** some of the distinctive features of their plan.
   b The judges of the competition particularly liked the way that the Griffins' plan took into account natural features, such as the surrounding hills and the native bush. What evidence can you find of this on the original plan?

2 Look closely at the vertical aerial photograph of modern-day Canberra (Source 10).
   a **List** the features that indicate this is a planned city.
   b **Identify** the feature located at I5. Is this the land use that the Griffins called for at this place?
   c Locate three examples of where the Griffins' plan has not been followed. (For example, there is a missing bridge north-west of Capital Hill.)

Extend your understanding

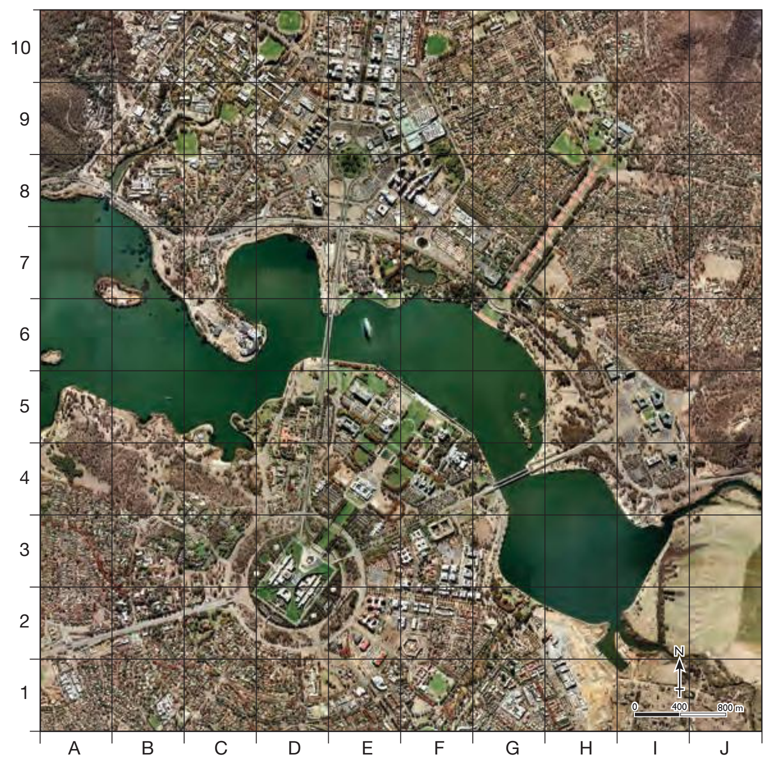
1 What types of issues can changing land use and development create for people living in cities?

2 In Source 10, **identify** and describe evidence of changing land use in H1 and H2.

3 **Explain** how Canberra is an example of the strategy of decentralisation.

4 Other examples of planned capital cities include Brasilia in Brazil and Ottawa in Canada. **Research** another planned capital city of your choice to find out about the reasons for its location and design.

Source 9 The Griffins' original plan for Canberra, drawn in 1911



Source 10 A vertical aerial photograph of modern-day Canberra

5 CHAPTER REVIEW

Review questions

5A Why do people live in cities?

1 Copy the PMI (Plus, Minus, Interesting) chart below into your notebook. Complete a PMI analysis of the advantages and disadvantages of living in a growing city.
- In the first column (Plus), list the advantages of living in a growing city.
- In the second column (Minus), list the disadvantages of living in a growing city.
- In the final column (Interesting), list the changes that occur as a city grows that are neither a plus nor a minus. (6 marks)

Plus	Minus	Interesting

2 Using your findings from question 1, write a paragraph that **summarises** the strengths and weaknesses of growing cities. (4 marks)

(Total: 10 marks)

5B Where do people in different countries live?

1 **List** two natural and two human factors that explain why so many Australians live in large cities. (2 marks)

2 **Compare** where Americans live and where Australians live. How are they similar and how are they different? (4 marks)

3 **Distinguish between** the transport links that influenced the foundation of Australian and American cities. Remember, when you distinguish between two things, you must talk about how they are different. (4 marks)

(Total: 10 marks)

5C How can we plan for and manage Australia's future?

1 In your own words, **define** 'suburbanisation'. (1 mark)

2 **Explain** how suburbanisation has influenced the size and shape of Australia's cities. (3 marks)

3 **Discuss** the strategy of decentralisation. Remember, the best discussions always consider both sides of the argument. You should also give your opinion on the matter. (6 marks)

(Total: 10 marks)

Review activity

Use your map-reading skills to answer the questions that follow about the world's urban slums. You may use an atlas or the world map at the back of this book to help.

Urban slums

One of the consequences of rapid urbanisation is the growth of the world's slums. The United Nations defines an 'urban slum' as an area of a city where there are households lacking one or more of the following: access to improved water; access to improved sanitation; sufficient living area; or durability of housing. Today, there are more than 900 million people living in slums around the world.

1 In your own words, **define** an urban slum. (1 mark)

2 **Identify** and **describe** the purpose and type of map in Source 10. (3 marks)

3 **Explain** the interconnection between the urban explosion and the emergence of urban slums. (3 marks)

4 **Examine** Source 10.

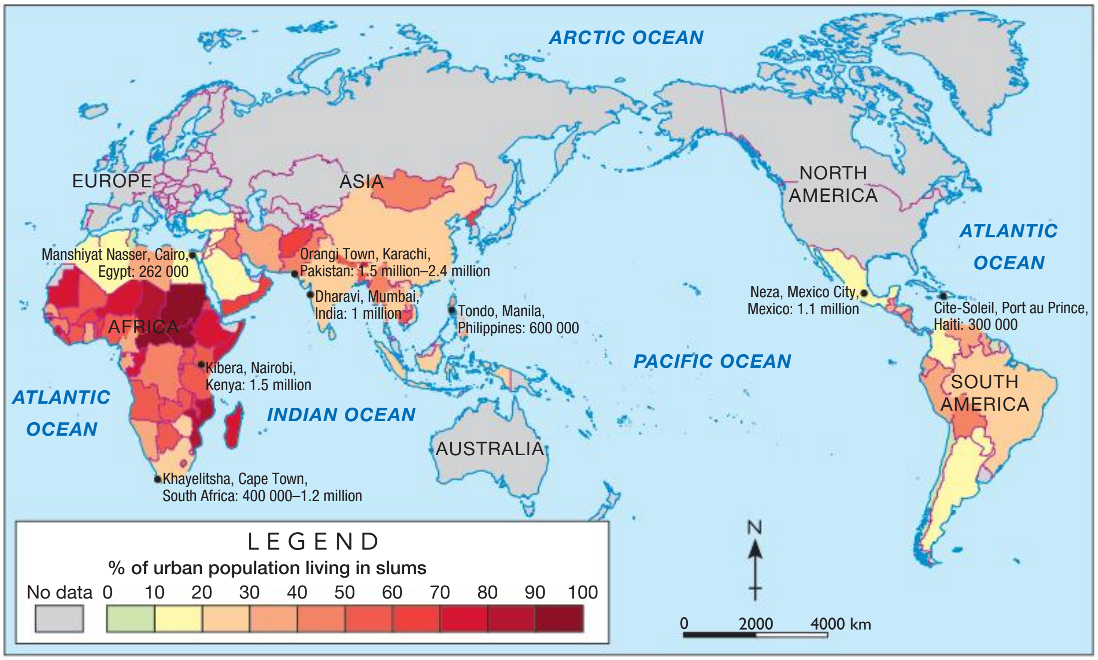
   a **Identify** the most populated slum in the world. Where is it found, on what continent is it located and how big is the population? (2 marks)

   b Using the PQE method (see page 26 of 'The geography toolkit'), **describe** the distribution of slums in this map. (5 marks)

   c **Calculate** the percentage of the population that lives in slums in each of these countries: Namibia, Sudan, Afghanistan, Myanmar, Niger, Argentina. Then rank the countries in order from the one with the highest percentage of its population living in slums to the one with the lowest percentage. (6 marks)

(Total: 20 marks)

URBAN POPULATIONS LIVING IN SLUMS



Source 10

Source: Oxford University Press/Our World in Data

Check your Student obook pro for these digital resources and more:

Student book questions Chapter 5

Key skill worksheet Communicating & reflecting: Chapter 5

Quizlet Play a game of Quizlet on Urban life.

Chapter review quiz Chapter 5

CHAPTER 6

Migration

There are many different reasons why we move – for work, for family, for love, to escape persecution, or for the chance of a better life. There are also different ways in which we move – we move across the street, to the next town, to a different state, or even to the other side of the world. Geographers refer to this movement of people as migration. Movements within the same country are known as internal migration, while movements between different countries are known as international migration.

Some people choose to move, which is called voluntary migration; while others are forced to move – to flee violence, poverty, famine or war – and this is called forced migration. In Australia, most people are voluntary migrants; and within a five-year period, about one-third of Australians will change their home address at least once. Worldwide, however, the numbers of forced migrants are on the rise.

Source 1 People who leave their country to flee violence, war or natural disaster are known as refugees. This image shows lifejackets discarded by refugees along the shoreline of Lesvos, Greece. In September 2015, refugees from Syria, Afghanistan and Iraq began arriving on the shores of Lesvos. More than a half a million refugees and asylum seekers landed there.

6A
Why do people move?

6B
How has international migration changed Australia?

6.1 Explaining population movements

In this topic, you will:

- identify and describe the main types and patterns of internal and international migration.

migrants
people who move from one place to another

internally displaced persons (IDPs)
people who have been forced to migrate, but who remain in their home country

Each day, millions of people around the world pack up their belongings and move to a new home. Most of these people chose to move; while others have been forced to do so. Regardless of the different reasons, one thing is for certain – the world's population is always on the move! Geographers are interested in these movements because they shape our world. The movement of **migrants** from one place to another brings opportunities for some people and challenges for others.

There are two main types of migration: internal migration and international migration.

Internal migration

Internal migration refers to the movement of people within a certain region or country (for example, a person moving from Melbourne to Perth). One of the largest movements of people in history is currently underway, as people around the world move from rural areas to cities in search of work and better opportunities. This type of internal migration is particularly common in developing countries such as China, Indonesia and India.

Source 1 In northern Syria, more than 1.5 million people live in IDP camps. This boy is returning from school to his temporary home in one of them.

Most internal migrants choose to move. For many, this choice gives them the chance to improve their lifestyle. For example, a young couple may move to the fringe of the city to build a new home and start a family.

There are some internal migrants, however, who are forced to move. In many countries, wars and civil conflicts mean that a person's home becomes dangerous, and they must move to a safer place. Natural disasters – such as floods, storms and droughts – can also force people to move to a safer place. People who seek refuge (safety) in their home country are referred to as **internally displaced persons (IDPs)**. Worldwide, there are more than 40 million people who have been displaced by conflict and another 1.6 million who have been displaced by natural disasters.

Source 2 About 90 per cent of the workforce of the United Arab Emirates are migrants. These Pakistani workers are finishing the construction of a bridge in Dubai.

International migration

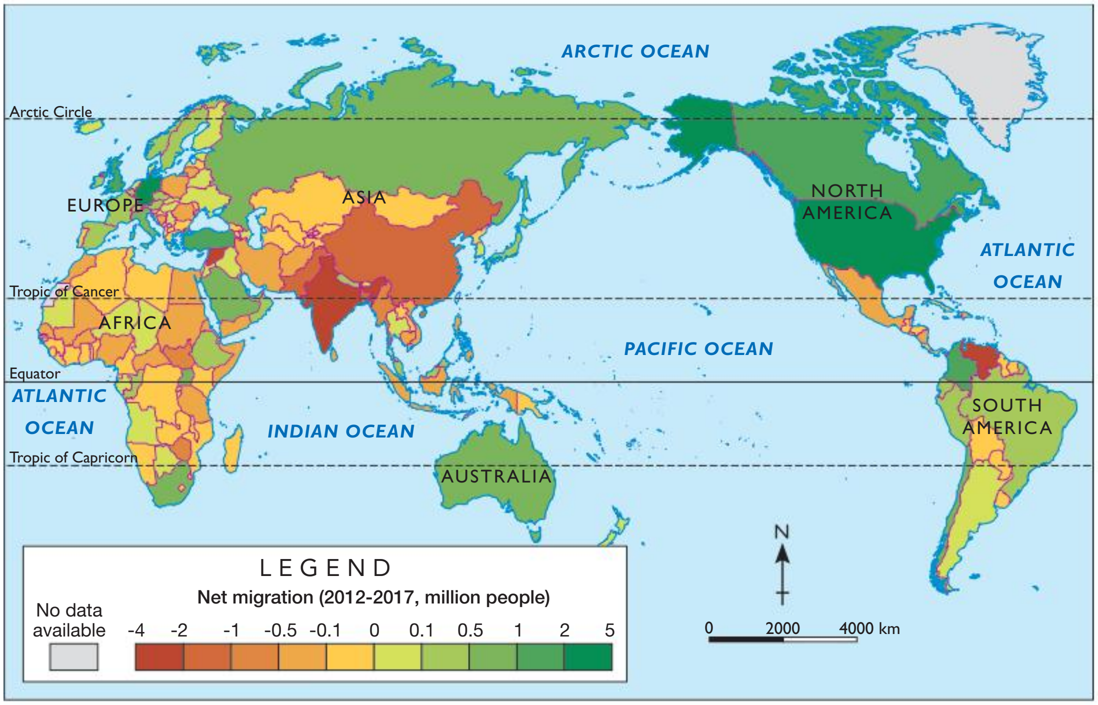
International migration refers to the movement of people across country borders (for example, a person moving from Africa to Australia). There are over 270 million people who move countries each year (around 3.5 per cent of the world's population). These people have the potential to bring great change – both to the place they leave and to their new home.

As with internal migrants, most international migrants choose to move. They often do so to improve their way of life. In many countries, migrants make important contributions to society in their new country.

Some people, however, flee their home country as they fear for their personal safety if they remain. These people are referred to as **refugees**. In 2018, there were over 25 million refugees worldwide. Refugees are some of our most vulnerable people. They often require assistance and support to thrive in their new country. Many return to their original country when it is safe to do so.

refugees
people who move to another country because of a natural disaster or to avoid persecution

WORLD: NET MIGRATION, 2017



Source 3

Source: Oxford University Press/Our World in Data

Note: 'Net migration' means the net total of migrants; that is, the total number of migrant arrivals less the total number of migrant departures, including both citizens and non-citizens. Data are five-year estimates.

6.1 CHECK YOUR LEARNING

Review and understand

1 **Identify** the two main types of migration.
2 **Describe** the main features of internal migration.
3 **Describe** the main features of international migration.

Apply and analyse

4 Copy the following table into your notebook:

Internal migrants		International migrants	
Voluntary	Forced (IDPs)	Voluntary	Forced (refugees)

a **Classify** the following migrants into the correct column on the table:
- the schoolboy in Source 1
- the Pakistani workers in Source 2
- a family that moves to the outer suburbs of their home city
- the people who have left behind lifejackets in Source 1 in the opening of this chapter.

b Give one more example of your own in each column.

5 **Examine** Source 3, which shows the number of migrant arrivals in each country over a five-year period minus the number of departures.

a Identify some countries shown as having less than zero net migrants.

b Does Australia have more arrivals or more departures?

c Identify the country that has the largest net number of migrants.

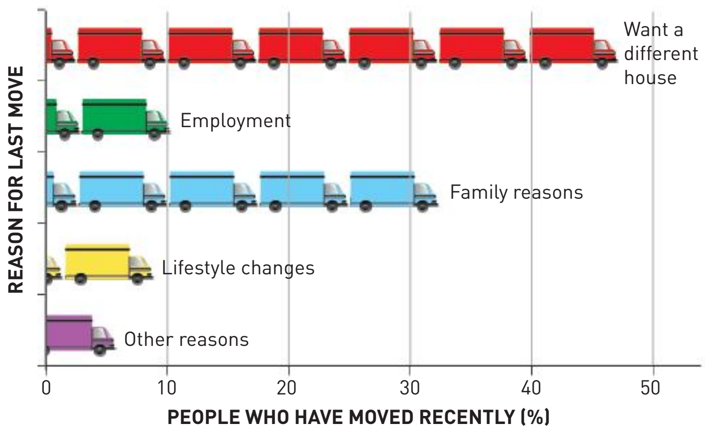
6.2 Population movements in Australia

In this topic, you will:

» identify and explain the reasons for and effects of internal migration in Australia.

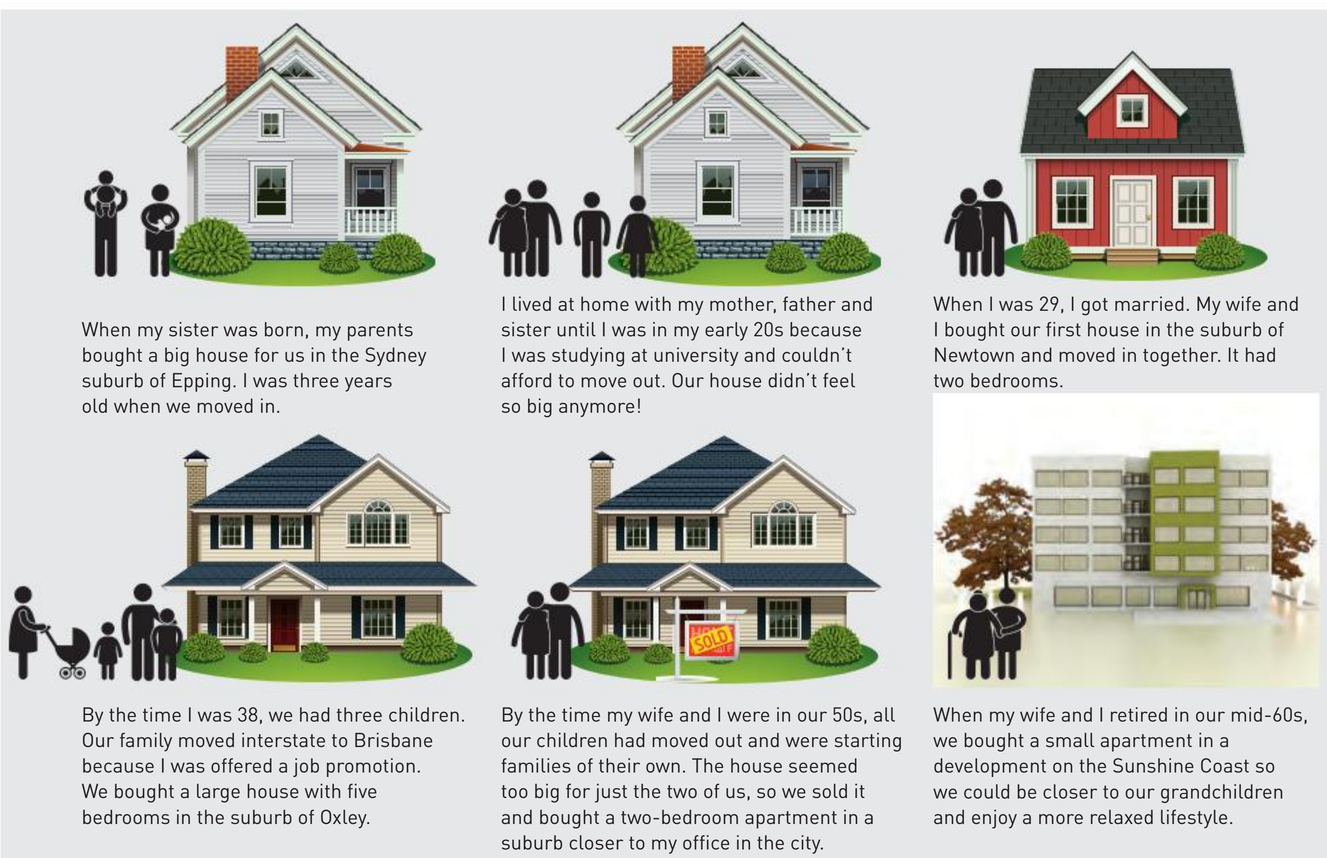
Australia has a very mobile population. Statistics show that about 40 per cent of us move home at least once every five years. Around 15 per cent of us move every year. Source 4 shows some of the main reasons why people move house in Australia, while Source 5 demonstrates these trends using an example of an individual and the types of decisions they might make during their lifetime.

Key skill worksheet
Collecting & representing data: Creating an infographic



Source 4 The main reasons people move home within Australia

Note: Proportions may add up to more than 100 per cent as respondents could provide more than one reason for their last move.



Source 5 People move for different reasons at different stages of their lives.

As you can see, migration in Australia is usually a very personal decision and is based on a number of important factors. These may be linked to a person's personal tastes, family life, work income, or health. For example, in Australia there has been a movement of people towards the edges of large cities and towards smaller towns on the coast. The first of these moves is largely due to the cheaper land available on the city fringe, and the second is chiefly due to people looking for a change in lifestyle. This movement of people to regional coastal towns is referred to as a 'sea change'.

Sydney to Melbourne migration: tipping the balance

Sydney has been Australia's largest city since 1901. Ten years ago, it had 450 000 more people than Melbourne. However, there has been a dramatic shift in Australia's population since then: Melbourne's population has increased rapidly, while the growth of Sydney's population has slowed down.

At the current rate of change, Melbourne's population will be larger than Sydney's by 2026. There are a few reasons for this predicted change:

- The rate of people leaving Sydney is much greater than the rate of people arriving. Each year, about 25 000 more people leave Sydney compared to those arriving from other parts of the country.
- Melbourne has been steadily gaining internal migrants for the past 10 years. These include a large number of Sydneysiders moving to Melbourne. One reason for this is the rising house prices in Sydney (see Source 6).

Source 6 One of the reasons people are leaving Sydney is increasing property prices. The average house price in Sydney is more than $150 000 greater than in Melbourne.

Going forward, geographers will have to take into consideration the impact of the COVID-19 pandemic on population. Both Sydney and Melbourne lost residents in 2020, with many people moving to regional areas within the state (see topic 5.14 on page 164).

6.2 CHECK YOUR LEARNING

Review and understand

1 **List** three reasons why people move home in Australia.

2 **Rank** the reasons people move to a new house in Australia from the most common to the least common.

3 **Identify** one of the reasons why people are moving from Sydney to Melbourne.

Apply and analyse

4 **Suggest** some reasons why people move home in their twenties.

5 **Explain** why Melbourne's population is predicted to be bigger than Sydney's by 2026.

Evaluate and create

6 How does migration of large numbers of people from large cities to coastal towns change both places? Brainstorm possible answers to this question as a class, and then group the responses into positive changes and negative changes.

7 Imagine you are a geographer in 2030 analysing the impact of the COVID-19 pandemic on Australia's population. What changes do you think you would be including in your analysis?

6.3 Australian mining towns

In this topic, you will:

» examine the effects of migration on mining towns in Australia.

Australia is home to some of the world's largest mines. These mines tend to be located in remote areas, where rich deposits of metals and minerals (such as coal, uranium and iron ore) can be found underground.

From around 2005 until 2015, Australia experienced a mining boom. During this period, a huge increase in demand for Australian mineral resources – particularly from China and India – meant that the prices of these minerals went up. To meet the demand, Australian mining companies built new mines and employed tens of thousands of new workers. The mining boom brought about one of the most significant population movements in recent Australian history.

CASE STUDY

Karratha, Western Australia

The town of Karratha lies in the Pilbara region. Located in north-west Western Australia, the Pilbara has rich deposits of iron ore and vast reserves of natural gas (located offshore).

Karratha was established in 1970 for the workers employed in the mining industry. Since then, it has grown to a town with a permanent population of over 20 000 people.

Not everyone who works on the mines in the Pilbara lives in Karratha. Some stay in the area for three weeks and then fly home for two weeks; while others work in the mines from Monday to Friday and then fly home for the weekend. This type of lifestyle is referred to as 'fly in, fly out' (FIFO), and it allows mine workers to take advantage of available jobs in remote areas without disrupting their families.

The changes in Karratha have presented several key issues for governments and the residents of the town. For example, new infrastructure, such as schools and roads, needs to be developed for the incoming mine workers and their families without reducing the liveability of the town. Some locals are expecting the town to reach a population of 50 000.

IRON ORE MINES AND RAILWAYS IN THE PILBARA REGION

Source 7

Source: Oxford University Press

Reading population pyramids

Population pyramids are bar graphs that show the percentage of males and females of different ages in a population. The population pyramid in Source 8 compares the distribution of men and women in two different populations: in the Pilbara region, and nationwide in Australia. This type of population pyramid helps geographers compare population at a local scale with population at the national scale.

Log on to your obook pro to practise this skill.

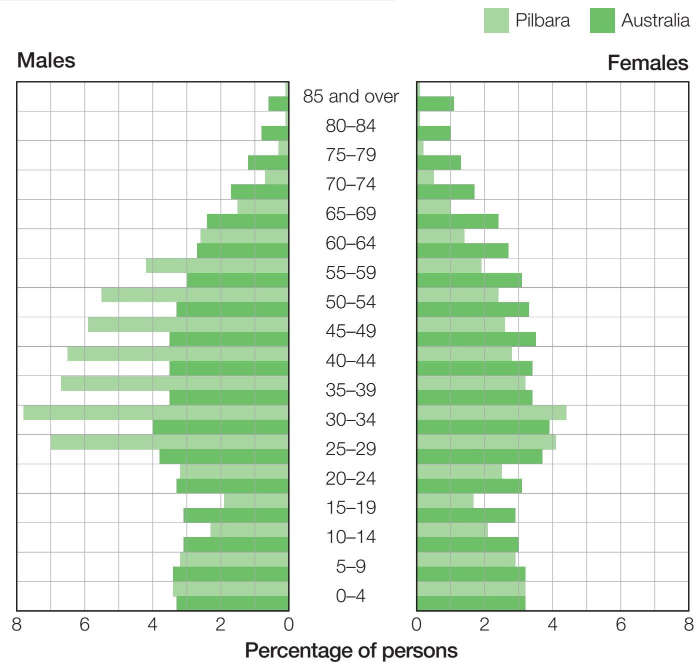
KEY SKILL
Collecting & representing data

Key skill worksheet
Reading population pyramids

Boom and bust

As the Australian mining economy boomed, the price of iron ore reached US$187 per tonne in 2011. However, a drop in demand from other countries meant that prices started to dive, and by the end of 2015, the price was about US$41 per tonne. Fortunately, by 2019, 'mining boom 2.0' was under way, and countries such as China, Japan and South Korea provided a healthy demand for iron ore. In April 2021, the price was US$190 per tonne.

The future of towns like Karratha is very dependent on the demand for minerals in other countries. If the price of iron ore drops again, it could significantly impact Karratha and other towns. This is referred to as a 'boom and bust' cycle.



Source 8 Population pyramid for the Pilbara region and for the total Australian population. Source: Data from .id

6.3 CHECK YOUR LEARNING

Review and understand

1 **Identify** three metals and/or minerals that Australia exports to other countries.

2 **Outline** what happened in Australia between 2005 and 2015.

3 **Define** the term FIFO, and describe some features of this lifestyle.

Apply and analyse

4 In your own words, **explain** what is meant by the term 'boom and bust'.

5 **Examine** Source 7.
   a Identify how many mines are shown on this map.
   b Where is the iron ore taken once it is mined?
   c Locate Karratha on the map. Using evidence from the map, explain why Karratha's location makes it an important mining town.

6 **Examine** Source 8.
   a What are three major differences between the population of the Pilbara and the total Australian population?
   b Suggest reasons why these differences occur. (Think about the typical age and gender of mine workers to help you answer this question.)

Evaluate and create

7 Work in groups to brainstorm positive and negative impacts of the population growth in Karratha during the mining boom. In your brainstorm, you may like to use headings, such as 'Changes to the environment', 'Changes to housing' and 'Changes to people's way of life'.

6.4 Population movement in China

In this topic, you will:

» identify and explain the reasons for internal migration in China.

For thousands of years, most Chinese people lived in small rural villages. Their lives were dominated by the daily routine of farming – planting, weeding and harvesting crops, and caring for animals such as pigs and cows. Over the past few decades, however, this situation has changed.

Although China is still home to more than half a billion farmers, it also has some of the world's largest and fastest-growing cities. Lured by the remarkable boom in China's economy from the late 1970s, millions of Chinese peasants have left – and continue to leave – their farms, and head for one of the cities along the east coast, to seek work and a better life.

This movement of people from rural areas to cities in China is one of the greatest migrations in human history; and it has led to many inequalities between rural and urban areas, with the average income in rural areas being about one-third of that in cities.

Source 9 Small rural villages dot the landscape of Guangxi Province in southern China.

From rural life …

Xianglan Li lives in a small village in Guangxi Province in southern China. Her day begins at dawn, when she wakes to sweep the concrete floor of the small home she shares with her husband – who works part time as a labourer on a building site in a nearby town – and their son. After breakfast Xianglan feeds the chickens and pigs, and collects waste from the pigsty for use as fertiliser in the fields.

The family home has no running water and no inside toilet. Using the water from the buckets she has placed beside the house to collect rainwater, Xianglan throws some on the road to keep down the dust. Like most rural villagers in China, the family has no car.

Xianglan joins other villagers walking to their fields a few kilometres from the village. The roads are slowly filling with small tractors and bikes, as well as farmers carrying their produce on long poles.

Xianglan spends her morning weeding the wheat and picking chillies for the market. In the afternoon she collects firewood from the nearby forest. Carrying the wood and chillies, she walks through the village to her home.

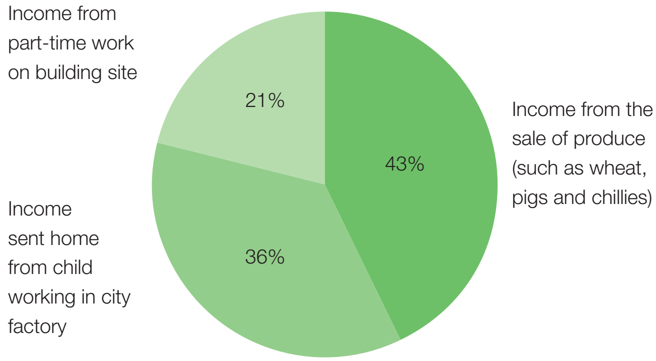
Like many people in rural China, Xianglan's family relies on money sent home from a relative working in the city. Xianglan's daughter, Xiu, has sent a new colour television from Shenzhen. There is only electricity for a few hours in the evening, so after dinner Xianglan and her husband sit on their bed and watch a new soap opera. They go to sleep as the sun sets.

Explore it!
A virtual field trip to Guangxi Province in Southern China

… to urban life

Xianglan's daughter, Xiu, lives in Shenzhen, a major city with a population of more than 13 million people near Hong Kong, hundreds of kilometres from her family's village. Shenzhen is a full day's train ride away. Three years ago, Xiu left her family home to move to the city to find work. She now works in a factory, where she assembles laptop computers. Xiu lives in a dormitory owned by the company and shares a room with seven other workers. There is a cafeteria in the dormitory building and the bathrooms have hot and cold running water. There is reliable electricity, which the workers use to watch television in their spare time, wash their clothes and charge their mobile phones.

Xiu works 10 hours a day in the factory. She is pleased to have a job so she can help support her parents and brother, but she finds the work boring and repetitive. She knows that if she quits she will be quickly replaced, but she sometimes thinks about moving back to Guangxi. She catches the train home once a year to celebrate Chinese New Year with her family. Next year, she intends to take home a mobile phone for her father.



Source 10 Sources of income in Xianglan Li's household

Source 11 Xiu works in an electronics factory in Shenzhen, assembling computers for export.

6.4 CHECK YOUR LEARNING

Review and understand

1. **Identify** why Chinese people are moving from rural areas to large cities.
2. What does Xiu do for a job? Where do you think she was trained for this job?

Analyse and apply

3. Use the geographic concept of interconnection (see page 8 of 'The geography toolkit') to **explain** how your classroom is linked to the factory where Xiu works.
4. a **Compare** the way of life in the village to that in the city. What are some of the major similarities and differences between the two places?
   b Do such differences occur between rural and urban places in Australia?
5. **Examine** Source 10.
   a What type of graph is this?
   b Use data from this graph to explain how the money Xiu sends her parents contributes to the family's income.

Evaluate and create

6. In pairs, **discuss** the ways in which the migration of young people such as Xiu changes both the Chinese cities to which they migrate and the rural villages they come from.
7. If Xiu's father visited her in Shenzhen, what do you think he would find most surprising about his daughter's way of life? Give reasons for your answer.

6.5 Case study: Growth in Shenzhen

In this topic, you will:

- examine the role of labour migration and the urban development of Shenzhen, China.

megalopolis
a collection of large cities that are close together, and so closely linked that they effectively form one continuous urban area

Map it!
The Pearl River Delta Megalopolis

The city of Shenzhen in south-east China lies near the mouth of the Pearl River. In 1950, it was a small fishing village, home to about 3000 people. Today, the population is over 13 million. The region surrounding Shenzhen has experienced an urban explosion. As a result, the Pearl River **megalopolis** has formed. The Pearl River megalopolis is home to 55 million people, living in areas of south-east China including Guangzhou, Hong Kong and Macau.

The region has become an economic powerhouse, with different areas specialising in different industries. For example, Zhuhai in the region's west is a transportation hub, whereas Huizhou in the region's east produces petrochemicals. There is an interactive map of the Pearl City megalopolis available on your obook pro.

Shenzhen produces much of the world's electronic goods, including computers and mobile phones. It is very likely that somewhere in your home, school or even your pocket is something that was made in this region.

Source 12 A view of Shenzhen in 1964

Source 13 A view of Shenzhen in 2015

Internal migration to Shenzhen

The population boom in Shenzhen has been powered by internal migrants such as Xiu Li (see topic 6.4). It began in the late 1970s, when the Chinese Government began opening the Chinese economy to the rest of the world. Four locations in China were chosen as special economic zones (SEZs) where new industries would be built. Hundreds of millions of rural workers moved to the SEZs to work in these new industries. The government also encouraged this migration.

The Pearl River Delta was selected as the location of one of these SEZs, as it has a large harbour and is close to Hong Kong. The delta also provided a large area of cheap, flat land for new industries to build on (see Source 12).

The floating population

In China, there is a system of household registration known as *hukou*. Through this system, each person in China is registered in the place of their birth. Depending on where they were born, they are classified as either 'rural' or 'urban'. Each person carries this registration for life. As hundreds of millions of rural migrants flood into cities such as Shenzhen, they carry with them their rural registration. This marks them as non-residents of the city. These people have become known as the 'floating population' – people who work in the city, but legally belong to the countryside. As official residents of rural places, they are not entitled to benefits enjoyed by city residents. One of the important benefits they miss out on is owning property in the city where they now live.

Workers with rural *hukou* tend to fill lower-paid, less-skilled jobs in cities like Shenzhen. The children of these migrant workers often stay in the countryside, raised by their grandparents. Known as the 'left-behind children', they face a life largely without daily contact with one or both of their parents. Some geographers estimate that there are 70 million left-behind children in China. In recent years, the Chinese Government has made changes to the *hukou* system to try and reduce some of the social problems experienced by migrant workers.

Source 14 Two 'left-behind' children help their grandfather pull a cart in rural China.

6.5 CHECK YOUR LEARNING

Review and understand

1. **Outline** why Shenzhen's population has grown so quickly.
2. a. In your own words, **describe** the *hukou* system.
   b. **List** some of the social impacts of this system.

Apply and analyse

3. **Compare** the two images of Shenzhen in Sources 12 and 13 by answering the following questions:
   a. What type of geographical photograph is used in these sources: aerial or ground-level?
   b. Describe the major changes that have occurred in the time between the two photographs.
   c. Explain why these changes have occurred.
4. Use Google Earth to explore the Pearl River Delta.
   a. **List** the names of some of the large cities on this delta.
   b. What are some of the natural and human features of this region that make it ideal for building large industrial cities?
   c. **Describe** the location of Shenzhen in relation to Hong Kong.

Evaluate and create

5. **Evaluate** the effect of the migration of workers to Shenzhen on China as a country by answering these questions:
   - What are the weaknesses of this system?
   - What are the strengths of this system?
   - What is your overall opinion of this system?
6. Copy the following chart into your notebook. Complete a PMI (Plus, Minus, Interesting) analysis of the growth of Shenzhen by filling out the chart.

Plus	Minus	Interesting

6A

RICH TASK

Quizlet

Revise the key terms you have learnt so far.

Wealth and migration

As we saw on page 178, China's huge economic growth over the past few decades has resulted in one of the greatest movements of people in human history. More than half a billion rural migrants have left their homes and a life of poverty for booming cities, most of which are on the east coast of the country. While this has led to increased growth in the Chinese economy and its influence on the world, it has also contributed to important changes for individual Chinese people. By interpreting the maps on the following page, you will learn more about the patterns of wealth and health in China.

KEY SKILL
Analysing maps

Drawing conclusions from maps

While maps are useful in everyday life for helping us to find our way, they can also reveal a great deal about places. By comparing different maps of the same place, we can see patterns that allow us to make conclusions about the place. Follow these steps to help you draw conclusions about life in China.

Step 1 Carefully examine each map in turn. Begin with the title, so you are clear about what is being shown in each map.

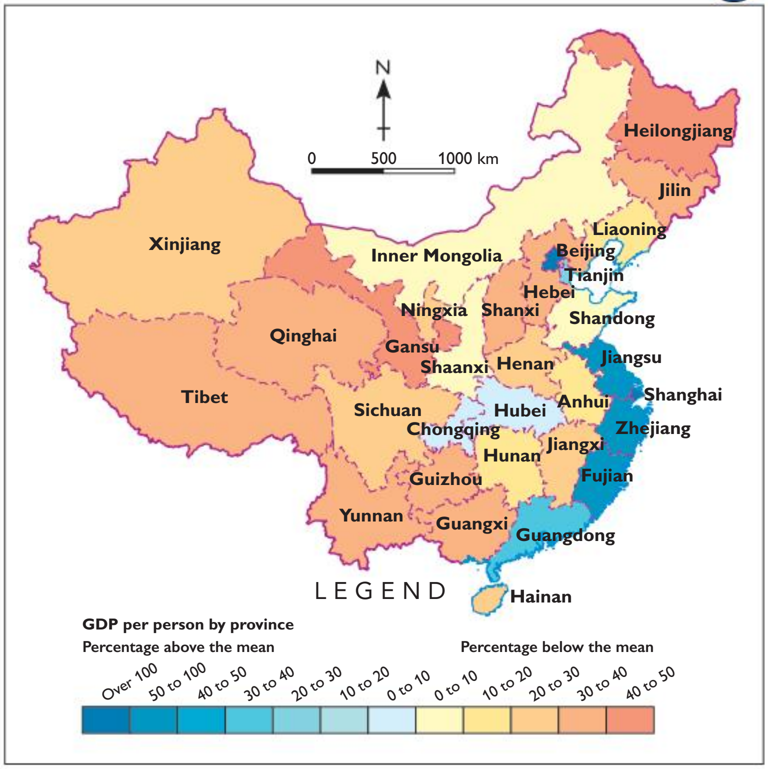
Step 2 Look carefully at the legend of each map. As the maps each show something different, their legends also differ. Before drawing any conclusions, you must clearly understand each legend.

Step 3 Link together the information for one place on the map. For example, for people living in the Xinjiang Province, the gross domestic product (GDP) per person is 40–50 per cent below the average mean (Source 15). Only a small number of migrants have moved into this province (Source 16).

Step 4 Look for general patterns on a map that match or appear similar to the general pattern on another map. This will allow you to draw conclusions that link together the information being shown on several maps. For example, provinces with low income levels tend to lose rather than gain migrants.

For more information on this key skill, refer to page 16 of 'The geography toolkit'.

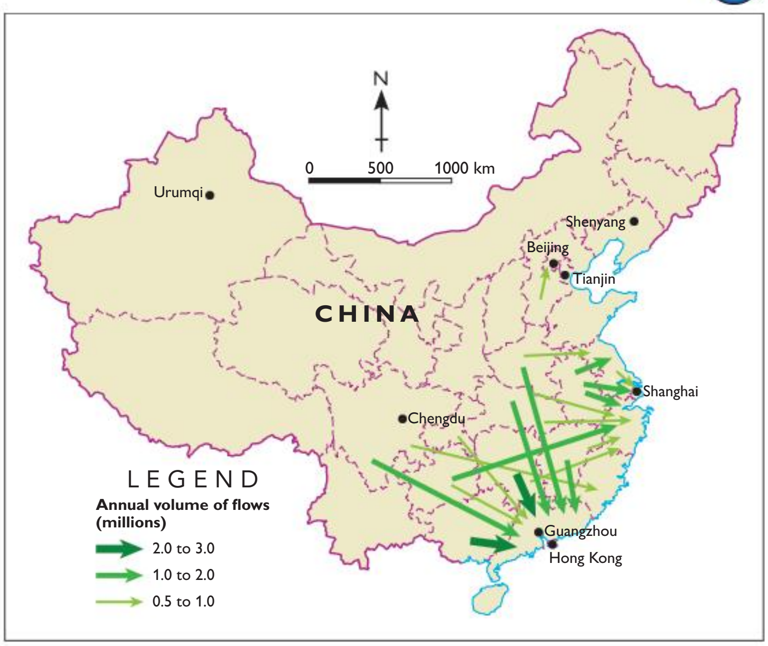
GDP PER PERSON FOR THE PROVINCES OF CHINA, 2019



Source 15 Source: Oxford University Press; data from statista

Note: 'GDP' is the total market value of all goods and services produced within a country in a given time frame. 'GDP per person' is an indication of people's average income.

MAP OF MIGRATION FLOWS, CHINA, 2005–10



Source 16 Source: Oxford University Press/ University of Washington

Practise the skill

1. Shenzhen is in Guangdong Province. **Describe** the migration flows to this province.
2. **Identify** the GDP per person in this province.
3. **Compare** this to the data for Sichuan Province. What are their similarities and what are their differences?
4. Write a short paragraph to **explain** the link between income and the direction of migration in China.
5. **Explain** how Sources 15 and 16 have helped you draw conclusions on migration in China.

Extend your understanding

1. On an A3 piece of paper, **construct** a sketch of Lee's migration model – see Source 12 on page 136 – as it applies to the cities of China. Use the information from Sources 15 and 16 and the case study of Shenzhen (page 180) to decide on the push and pull factors that attract migrants to China's cities.

6.6 International migration to Australia

In this topic, you will:

» explore why international migrants settle in Australia.

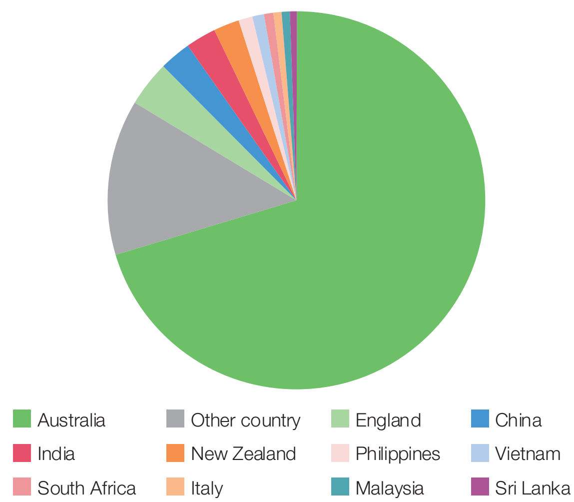
Modern Australia has been created and shaped by national and international population movements. From the arrival of the First Fleet in 1788 – loaded with almost 1500 convicts, sailors and soldiers – Australia has been populated by waves of migrants. First, penal colonies at Sydney, Port Arthur and Fremantle were established. Then large numbers of migrants from Britain and Ireland came to establish towns and farms. From the middle of the nineteenth century, migrants arrived from across Asia and the Pacific Islands, and continued to flow from Europe. They were attracted by various factors, such as gold, work, and the promise of a new life.

During the 1900s, migrants from Britain continued to dominate. An immigration policy that discriminated against non-white migrants (known as the White Australia Policy) was enacted in the first days of the new nation in 1901 and remained in place until the 1970s.

The end of World War II in 1945 saw waves of migrants come to Australia from southern European countries, such as Italy and Greece. As immigration policies were freed up, these waves were followed by others from the Middle East, Asia and South America. Australian society is therefore very different from societies in long-established countries in Europe and Asia. Just like the United States, Canada, New Zealand and Argentina, this country is largely a nation of migrants. There are 7.5 million migrants living in Australia, and about half of all Australians have at least one parent who was born overseas.

Source 1 A family in Liverpool, England boarding a ship for Australia in 1955

Source 2 An immigration poster from 1948; this was used in Britain to attract migrants to Australia.

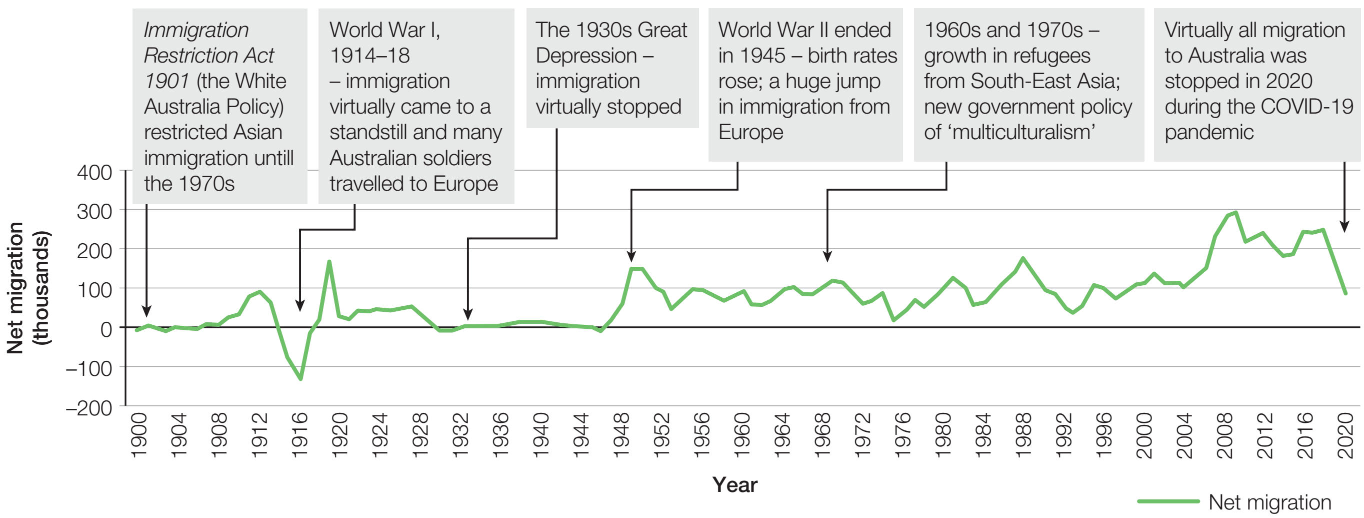


Source 3 Australian citizens by country of birth, 2019; in 2019, more than one-quarter of Australians (around 29 per cent) were born overseas.

Quiz me!
A quick quiz on international migration to Australia

Multicultural Australia

Today, Australia is considered by many to be a multicultural country. This description acknowledges that the people of Australia come from a wide range of ethnic and cultural backgrounds. In *The People of Australia – Australia's Multicultural Policy* (2011), the Australian Government states that 'multiculturalism is in Australia's national interest and speaks to fairness and inclusion. It enhances respect and support for cultural, religious and linguistic diversity.' On 21 March each year, many Australian schools and communities celebrate Australia's cultural diversity by holding Harmony Day events.



Source 4 Net migration (total arrivals less total departures) to Australia during the period 1900–2020

6.6 CHECK YOUR LEARNING

Review and understand

1 In your own words, **define** multiculturalism.

2 **Identify** the most significant waves of migration to Australia in the past 100 years.

Apply and analyse

3 **Apply** Lee's migration model (see Source 12 in topic 5.4 on page 136) to migration in Australia to brainstorm:

a some of the push factors that might encourage people to migrate to Australia

b some of the pull factors that might encourage people to migrate to Australia.

4 Examine Source 2.

a **Describe** how Australia is portrayed in this poster.

b **Explain** why this might seem attractive to people in Britain who had just endured World War II.

5 **Examine** Source 3.

a What type of graph is this?

b In which three countries are most migrants to Australia born?

Evaluate and create

6 Investigate your local community to find out how international migration has shaped it.

a Conduct some fieldwork at your local shops. Take photographs of any places, people or things that you think have been shaped by migration.

b Use the photographs you collected to **create** an annotated visual display, showing your findings.

6.7 The changing face of Australia

In this topic, you will:

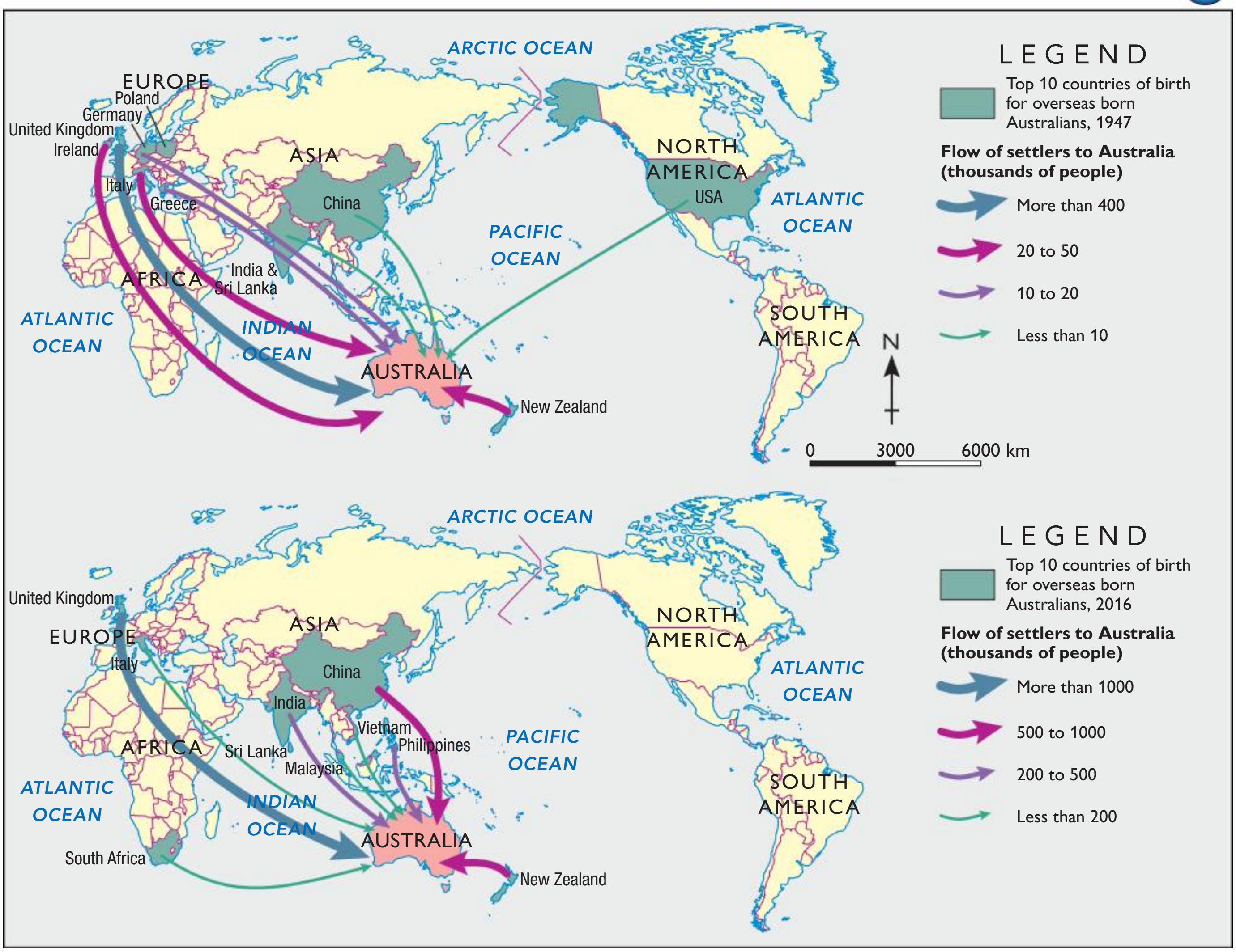
- explore the changing cultural diversity in Australia
- investigate the different types of international migration, including skilled migration and forced migration.

Australia is a multicultural nation – that is, a nation of many cultures. As we saw in topic 6.6 on page 184, Australia's cultural diversity is due mainly to our history. Our population is made up of Aboriginal and Torres Strait Islander peoples, the descendants of our British colonial past, and migrants from the world's many countries and cultures. Modern Australia is largely a land of migrants and their children. Today, in Australia there are people from more than 200 countries.

Multiculturalism through migration

Australia is a country that has been shaped by migration. As each migrant wave reaches our shores, the cultural DNA of our nation is changed.

THE TOP 10 COUNTRIES OF BIRTH FOR OVERSEAS-BORN AUSTRALIANS, 1947 AND 2016



Source 5

Source: Oxford University Press; data from the Australian Government

In the early twentieth century the White Australia Policy meant that around 80 per cent of all migrants came from the United Kingdom. After World War II ended in 1945, migrants from other parts of Europe came to Australia. In recent years, there has been a marked increase in migrants from other parts of the world, including African and Asian countries. The 2016 census was the first in Australia's history to record more migrants from Asia than Europe.

The number of languages spoken in Australia is a good indicator of our multiculturalism. English is the dominant language, but more than 200 other languages are spoken in Australian homes every day. The most common are Italian, Greek, Cantonese, Arabic and Mandarin.

At the time of European colonisation in 1788, it is estimated that more than 250 distinct Aboriginal languages were spoken in Australia. The 2016 census revealed that this number has fallen to fewer than 150.

Source 6 Just a few of the faces of cultural diversity in Australia

Comedian and artist **Anh Do** arrived in Australia as a refugee from Vietnam.

Australia's first female Prime Minister, **Julia Gillard**, was born in Wales and migrated to Australia as a child.

Host of *The Project*, **Waleed Aly**, is a Sunni Muslim, born and raised in Melbourne by Egyptian migrant parents.

Singer and actor **Jessica Mauboy** is an Aboriginal Australian.

Types of migrants

In general, Australian governments encourage voluntary migrants to live and work in Australia. In times of strong economic growth, there is a higher demand for migrants; but the migration intake may fall when the economy is weak and unemployment climbs.

The federal government is responsible for deciding on the number of migrants who may settle in Australia each year. The government sets out categories for migration:

- permanent migration visa categories:
  - skilled labour – to fill specific shortages in the workforce
  - family – to help families to reunite
  - humanitarian – to assist people in need, such as refugees
- temporary migration visa categories:
  - student – for individuals coming to Australia to study for a fixed period
  - business – for workers migrating for a short period or a working holiday
  - visitor – for short-term visitors for business, family visit or tourism.

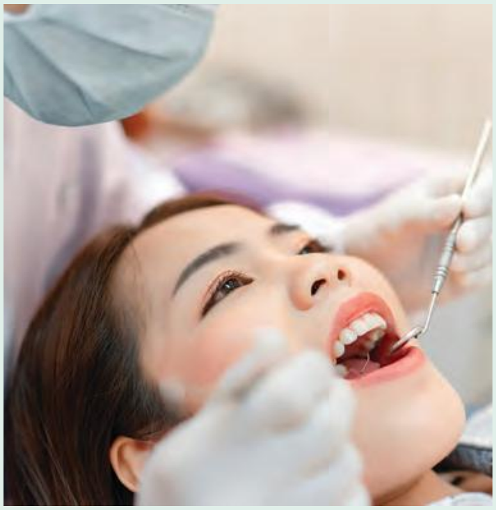
Preference is generally given to migrants with skills that are needed in Australia, or to those with family members who have already migrated.

CASE STUDY

A skilled migrant to Australia

Dr Adam Rahman applied to migrate to Australia as a skilled migrant from Cairo in Egypt. As an experienced dentist, his skills were in demand in Australia. His application was supported by an official from the Goulburn region in New South Wales. This official recognised that more dentists were needed in their area. Since migrating to Goulburn and starting a dentistry business, Dr Rahman has also founded several dentistry training academies in Sydney and Melbourne.

He employs between 15 and 20 people and helps train many more dentists.



Source 7 Dr Adam Rahman is an experienced dentist who uses his skills to contribute to the community.

Forced migration to Australia

Some arrivals in Australia are forced migrants, such as refugees. The number of refugees allowed to settle permanently has been a highly debated topic in Australian politics for many years.

CASE STUDY

A forced migrant to Australia

Dabessa and Lelissa worked as television journalists in Ethiopia. They are members of the Oromo people, an ethnic community that has been persecuted for many years in their home country. In 2004, Dabessa was arrested by members of the military. They accused him of supporting a group that was trying to overthrow the government. He was held in prison for three years and tried in court 125 times. He was eventually released.

Fearing for his life, Dabessa fled to Kenya. His children were able to join him, but Lelissa was arrested and placed in prison while she was still in Ethiopia. Dabessa and his children were brought to Australia by the United Nations and were able to settle in Australia as refugees.

Source 8 The United Nations helped Dabessa and his children arrive and settle in Australia.

After three years, Lelissa was released from prison. Dabessa applied to the Australian Government for her to be allowed to migrate to this country as a family migrant. The application process took three more years, but eventually the family was reunited in Melbourne.

As explained on page 173, refugees are people who are forced to leave their home because it is no longer safe. Often, they move to other parts of their home country. Sometimes they travel to other countries, including Australia.

In 1997, the federal government created the Refugee and Humanitarian Program. It is through this program that refugees and other people who need protection settle in Australia. Each year, the Minister of Immigration, Multicultural Affairs and Citizenship sets the number of people that will be taken into Australia. This decision is usually made in consultation with the United Nations and the Refugee Council of Australia. Since 1997, Australia has resettled more than 880 000 refugees as residents around the country.

In 2013, the government changed its policy so that refugees arriving by boat (sometimes referred to as 'boat people') would not receive a permanent humanitarian visa. Instead, they are given temporary protection. This means they are no longer counted as a part of the Refugee and Humanitarian Program. They can apply to be refugees, but only if the minister allows them to.

These changes have led to heated debates in politics and among the members of the Australian public. While many believe we should limit the number of refugees we take into the country, others believe we should offer protection to those who have been forced to leave their home. You may have seen the issue talked about on television, heard it debated on the radio or discussed it around the dinner table at home.

6.7 CHECK YOUR LEARNING

Review and understand

1. In your own words, **describe** how the origins of migrants to Australia have changed over time.
2. **Define** the term 'skilled migrant'.
3. **Outline** how Dr Rahman has contributed to Australian society.

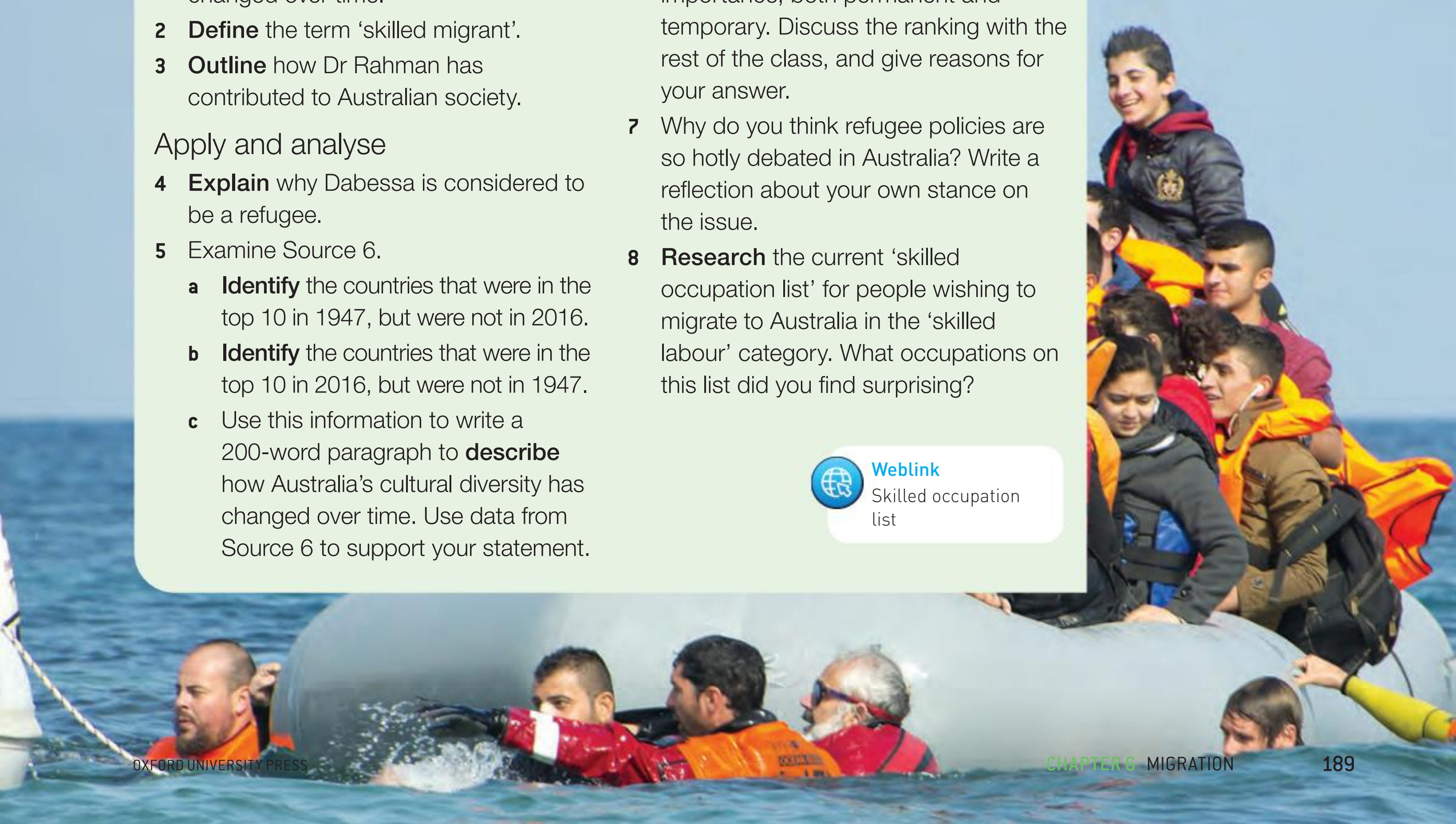
Apply and analyse

4. **Explain** why Dabessa is considered to be a refugee.
5. Examine Source 6.
   a. **Identify** the countries that were in the top 10 in 1947, but were not in 2016.
   b. **Identify** the countries that were in the top 10 in 2016, but were not in 1947.
   c. Use this information to write a 200-word paragraph to **describe** how Australia's cultural diversity has changed over time. Use data from Source 6 to support your statement.

Evaluate and create

6. In pairs, rank the different visa categories of migrants in order of importance, both permanent and temporary. Discuss the ranking with the rest of the class, and give reasons for your answer.
7. Why do you think refugee policies are so hotly debated in Australia? Write a reflection about your own stance on the issue.
8. **Research** the current 'skilled occupation list' for people wishing to migrate to Australia in the 'skilled labour' category. What occupations on this list did you find surprising?

Weblink
Skilled occupation list



Source 9 Some refugees travel by boat. These refugees are sometimes referred to as 'boat people'.

6.8 Migrant communities in Australian cities

In this topic, you will:

» investigate where migrants settle and why.

Many people migrating to Australia choose to start their new lives in areas of a city where people with a similar cultural background have also settled. Over time, these areas can develop particular characteristics that reflect the cultures of the people who live there. For example, the Melbourne suburb of Dandenong is home to a large Vietnamese population, while the Sydney suburb of Parramatta has a large Indian population.

New arrivals tend to settle in the same areas for a variety of reasons. The houses there may be affordable, they may have family or friends close by, or there may be a number of community groups and support services nearby. These services might include emergency accommodation, translation services, adult language and education centres, employment agencies and accommodation services (such as Centrelink and the Department of Housing). These areas may also provide important social institutions (such as places of worship), and meeting places and shops selling familiar items (such as food, utensils and clothing).

For people from non-English-speaking backgrounds, an important factor that pulls them to live in certain suburbs is the presence of professionals (such as doctors, lawyers and accountants), shopkeepers and other people who speak their language. This can be vital in order for them to carry out their day-to-day lives.

CASE STUDY

Graph it!
Create a digital graph of the languages spoken at home in Box Hill.

The Chinese community in Box Hill, Melbourne

The suburb of Box Hill in Melbourne's east is an example of an area with what geographers call a high ethnic concentration. From a total population of around 21 000 residents, around 27 per cent were either born in China or have Chinese ancestry.

Many of those who were born in China arrived in Australia as university students. After finishing their degree, such students may apply to settle in Australia. Once they have become Australian citizens, they can then seek to have family members join them under the family visa scheme. These family members can then apply for Australian citizenship themselves.

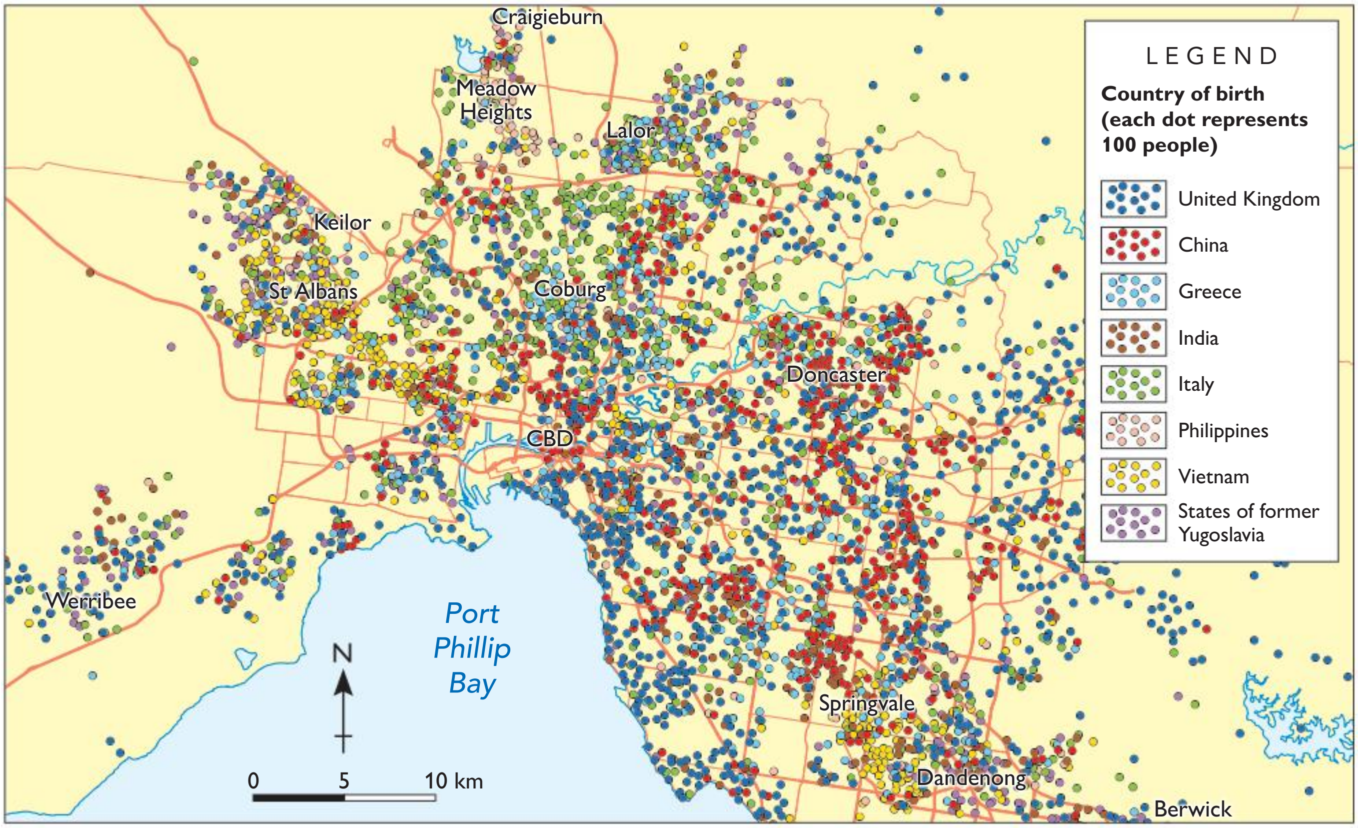
Chinese migration to Australia dates back to the 1820s, but boomed during the gold rushes of the 1850s and 1860s. Throughout the twentieth century, a series of Australian Government policies (including the White

Source 10 Box Hill residents celebrate the annual Chinese New Year festival.

Australia Policy) restricted the number of migrants from Asian countries. Since these policies were abandoned in the 1970s, there has been a steady increase in the numbers of Chinese people settling here. More than half a million Australian citizens were born in China. Mandarin is the second-most spoken language in our country, after English.

Weblink
Australian Bureau of Statistics

CONCENTRATION OF MELBOURNE RESIDENTS OF SELECTED ANCESTRIES, 2016



Source 11

Source: Oxford University Press

6.8 CHECK YOUR LEARNING

Review and understand

1 **Identify** three reasons why people from the same language and cultural backgrounds tend to settle in the same areas of a city.

2 **List** three pull factors that encourage non-English speaking migrants to live in a certain suburb.

Apply and analyse

3 Use the PQE method (see page 26 of 'The geography toolkit') to **describe** the distribution of residents from Chinese backgrounds in Melbourne shown in Source 11.

4 **Explain** how the arrival of large numbers of people from similar cultural and language backgrounds can change the areas in which they settle.

5 About 5 in every 100 people in Melbourne have Chinese ancestry. In Box Hill, it is 27 in every 100. What can geographers learn by comparing these figures?

Evaluate and create

6 Access the profile for your community using the census data available on the Australian Bureau of Statistics website (a weblink is available on your obook pro). **Create** a bar graph of the top 5 languages spoken at home using the 'country of birth' data.

7 Imagine you are a migrant moving to a place where nobody speaks your language. Write a diary entry that explores the challenges this would create.

6B RICH TASK

International migration and Aboriginal and Torres Strait Islander peoples

The settlement of Australia by migrants has had a devastating impact on Aboriginal and Torres Strait Islander peoples since the arrival of European colonists. For example, the population of the Darung people around Botany Bay – where the first wave of European colonisers landed in 1788 – fell by 90 per cent in just three years.

Source 12 This plaque commemorates the 28 unarmed Aboriginal people massacred in retaliation for cattle theft at Myall Creek in New South Wales, 1838.

Europeans spread across the country in search of farming land and mineral wealth, and by 1900, the number of Aboriginal peoples in Australia was less than a quarter of what it had been in 1788. This fall in population was caused by many things that began with the arrival of Europeans. Some Aboriginal peoples died from diseases that had been introduced into Australia by the Europeans, such as influenza and measles. Others suffered from changes in diet, as they were cut off from their usual food sources. Most disturbingly, many were deliberately killed by white colonists or died in conflicts with them.

Today, Aboriginal and Torres Strait Islander peoples have a life expectancy eight years less than that of non-Indigenous Australians. Aboriginal and Torres Strait Islander peoples are underrepresented in government, education and employment, and overrepresented in prisons when compared with the wider Australian population.

KEY SKILL
Analysing maps

Reading a complex map

Complex maps contain more than one set of information. Follow these steps to help you read and understand a complex map.

Step 1 Look carefully at the legend. Complex maps can have more than one part to a legend. These parts will be represented on the map in different ways. For example, in Source 13 areas of colour are used to show the different types of Aboriginal and Torres Strait Islander land across Australia. Different-coloured symbols are used to show a range of significant sites.

Step 2 Train your eyes to look for one set of information at a time. For example, look at the solid blocks of colour on the map and work out what they tell you.

Step 3 Move to a different set of information and work out what that represents.

Step 4 Look for concentrations of the same symbol in areas to see if patterns exist.

For more information on this key skill, refer to page 16 of 'The geography toolkit'.

Quizlet
Revise the key terms you have learnt so far.

Practise the skill

Study Source 13.

1 **Describe** where the largest areas of Aboriginal and Torres Strait Islander-owned (freehold) land are located.

2 **List** the states and territories that have no Aboriginal and Torres Strait Islander-owned or leased land over 100 square kilometres.

3 The significant sites are harder to pick out on this crowded map, but the colours help them stand out. **Describe** the location of the Waterloo Creek massacre site, and how it appears on the map.

4 **Identify** the areas of Australia in which there were many sites of massacres.

5 **Identify** one significant Aboriginal art site in South Australia.

Extend your understanding

1 **List** three examples of how international migration to Australia impacted on Australia's Aboriginal and Torres Strait Islander population.

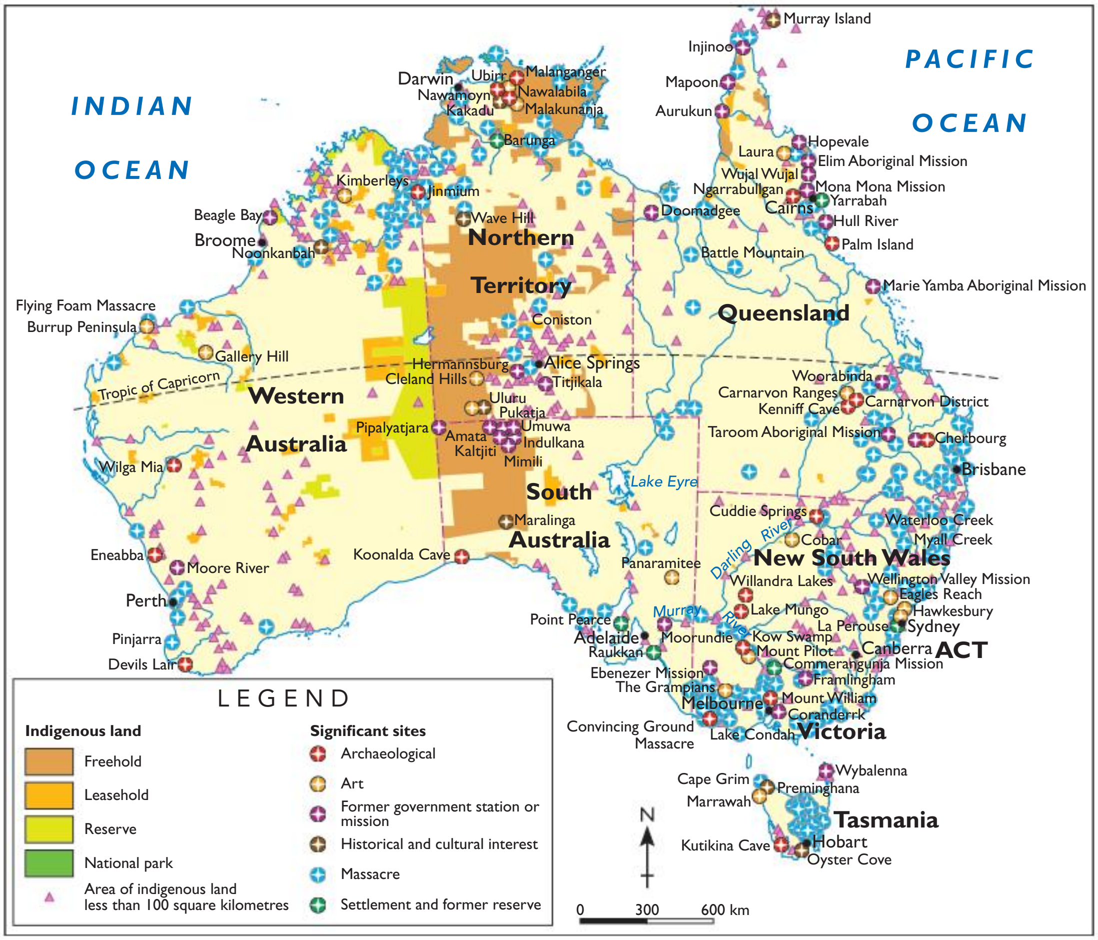
2 **Research** another indigenous group, such as the Māori peoples in New Zealand or the First Nations peoples of North America.

  a How was this group affected by early international migration?

  b How did this group respond to early international migration?

  c Find out the life expectancy, employment and imprisonment rates of members of this group compared with the rest of their country's population. How do these compare with those of Aboriginal and Torres Strait Islander peoples?

AUSTRALIA: ABORIGINAL AND TORRES STRAIT ISLANDER LANDS AND SIGNIFICANT SITES



Source 13

Source: Oxford University Press

6 CHAPTER REVIEW

Review questions

6A Why do people move?

1 In your own words, **define** the term ‘megalopolis’. (1 mark)

2 **Distinguish between** an internally displaced person and a member of a ‘floating population’. How are these people different? (4 marks)

3 Using an example from China or Australia, **summarise** why people move from one place within a country to another place within the same country. In your response, **describe** some of the difficulties they face when they migrate. (5 marks)

(Total: 10 marks)

6B How has international migration changed Australia?

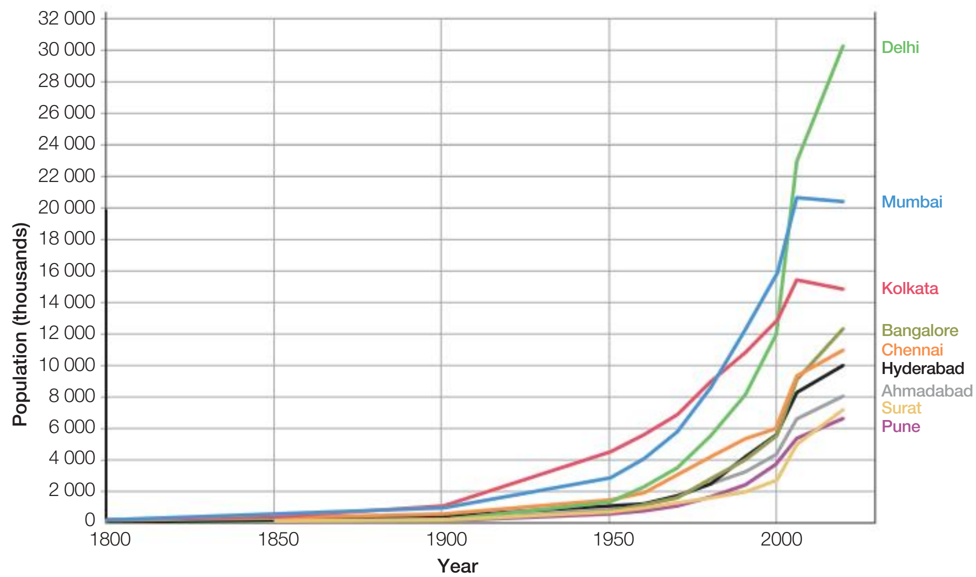
1 **Evaluate** the impact of migration in shaping Australian society. In your response, consider the impact of migrants on Australian culture, on cities and areas throughout Australia, and on Australia’s Aboriginal and Torres Strait Islander population. (10 marks)

(Total: 10 marks)

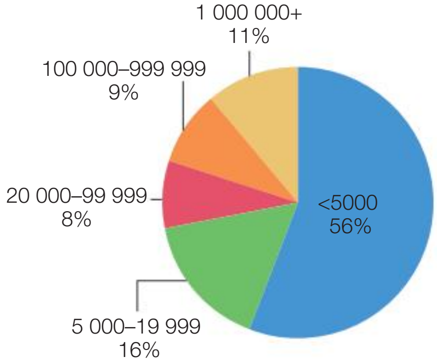
Review activity

Reading graphs

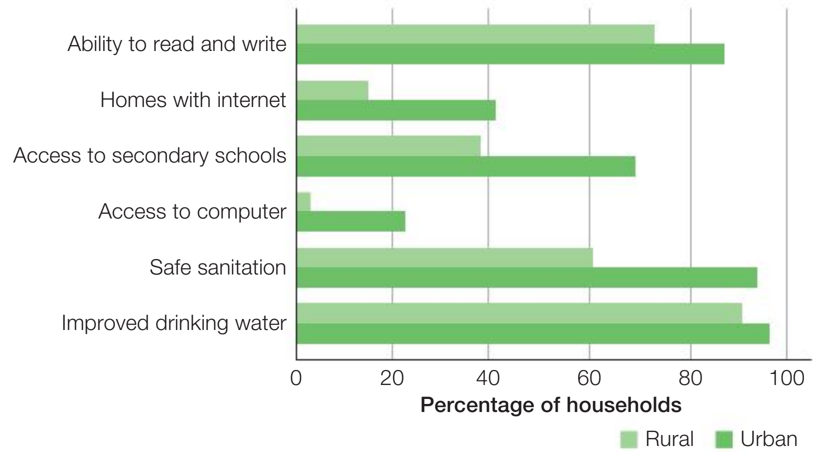
Examine the following graphs and answer the questions that follow about changes to India’s population.



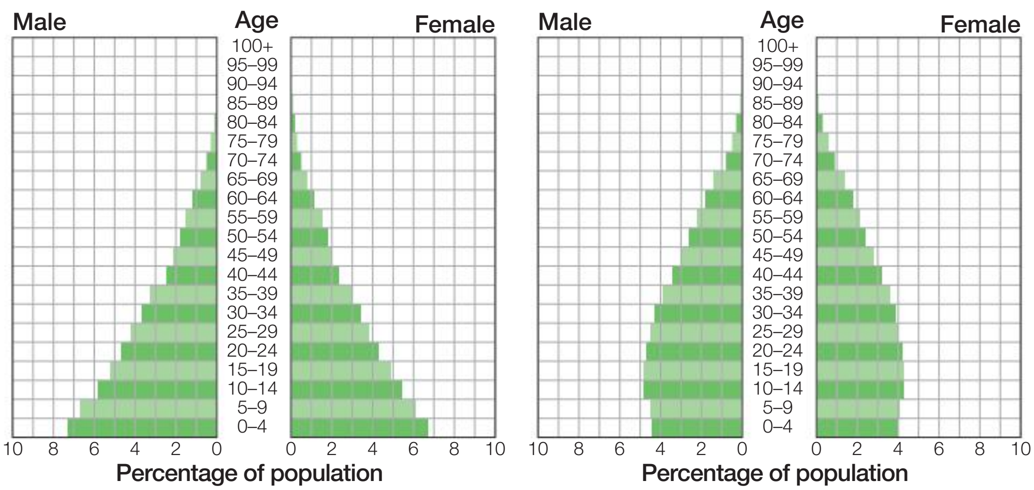
Source 14 Growth of India’s cities, 1800–2020



Source 15 India's population ranked by the size of the community in which people live



Source 16 Household services and amenities of urban and rural Indians



Source 17 Population pyramids for India – 1990 (left; total population: 873 277 798) and 2020 (right; total population: 1 380 004 385)

1 **Identify** which of these graphs best shows why many Indians choose to move to urban areas. Why did you choose this graph? (2 marks)

2 a **Identify** which of these graphs best shows how India's population is changing over time. (1 mark)

b Using the graph you identified in question 2a, **describe** two changes that occurred to India's population between 1990 and 2020. (4 marks)

3 Are conditions better in rural areas or urban areas? **Explain** your answer using data from the sources. (3 marks)

4 **Compare** the conditions in rural areas with those in urban areas. What are some key similarities and what are some key differences? (4 marks)

5 **Propose** three pull factors and three push factors that explain why many people in India are moving from rural areas to urban areas. (6 marks)

(Total: 20 marks)

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Chapter 6

Key skill worksheet
Communicating & reflecting: Chapter 6

Quizlet
Play a game of Quizlet on Migration.

Chapter review quiz
Chapter 6


2

PART 2

History

Concepts and skills

Chapter 7 The history toolkit 198

The European and Mediterranean world

pro **Chapter 8** Introduction to the European and Mediterranean world (available on obook pro) 220

Chapter 9 The Vikings 222

Chapter 10 Medieval Europe 260

pro **Chapter 11** The Ottoman Empire (available on obook pro) 326

The Asia–Pacific world

pro **Chapter 12** Introduction to the Asia–Pacific world (available on obook pro) 328

pro **Chapter 13** The Khmer Empire (available on obook pro) 330

pro **Chapter 14** Mongol expansion (available on obook pro) 332

Chapter 15 Japan under the shoguns 334

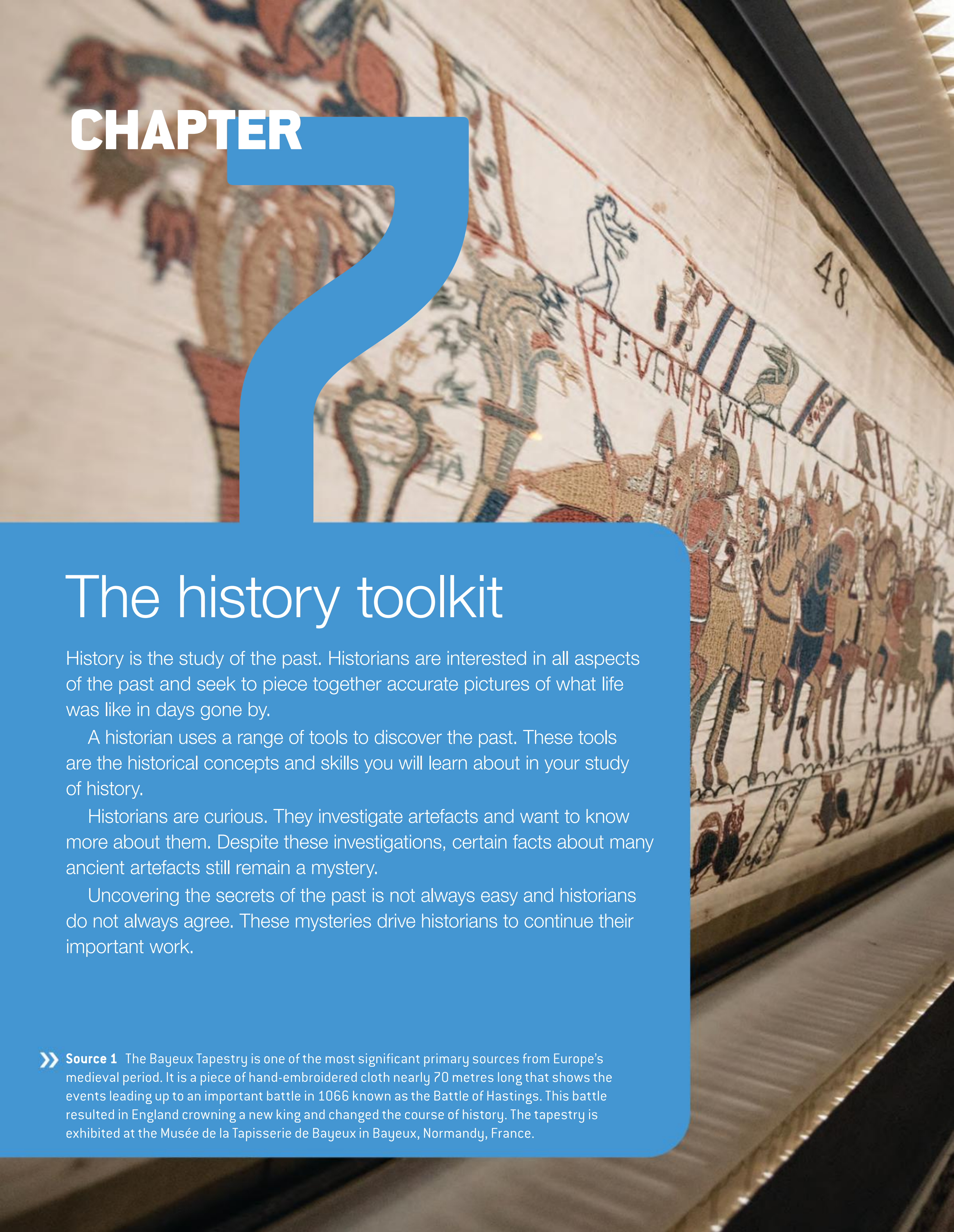
pro **Chapter 16** The Polynesian expansion across the Pacific (available on obook pro) 376

Expanding contacts: discovery and exploration

pro **Chapter 17** Introduction to expanding contacts: Discovery, colonisation and exploration (available on obook pro) 378

Chapter 18 Renaissance Italy 380

pro **Chapter 19** The Spanish conquest of the Americas (available on obook pro) 416



CHAPTER 7

The history toolkit

History is the study of the past. Historians are interested in all aspects of the past and seek to piece together accurate pictures of what life was like in days gone by.

A historian uses a range of tools to discover the past. These tools are the historical concepts and skills you will learn about in your study of history.

Historians are curious. They investigate artefacts and want to know more about them. Despite these investigations, certain facts about many ancient artefacts still remain a mystery.

Uncovering the secrets of the past is not always easy and historians do not always agree. These mysteries drive historians to continue their important work.

Source 1 The Bayeux Tapestry is one of the most significant primary sources from Europe's medieval period. It is a piece of hand-embroidered cloth nearly 70 metres long that shows the events leading up to an important battle in 1066 known as the Battle of Hastings. This battle resulted in England crowning a new king and changed the course of history. The tapestry is exhibited at the Musée de la Tapisserie de Bayeux in Bayeux, Normandy, France.

7A
What are the historical concepts?

7B
What are the historical skills?

7.1 Historical concepts

Historians use five concepts to help them investigate and understand the past. As you learn to use each of the concepts, you will begin to think like a historian. The five key concepts in history are:

- chronology
- cause and effect
- continuity and change
- evidence
- significance.

Check your learning
Log onto your obook pro to complete the questions for topic 7.1.

Chronology

Chronology refers to the arrangement of events in the order that they happened. Chronology is one of the most important things that you will study in history. When studying a period of time, historians put key events from that time in the exact order they occurred. This is known as chronological order. Chronology helps historians understand when, how and why events unfolded the way they did.

Cause and effect

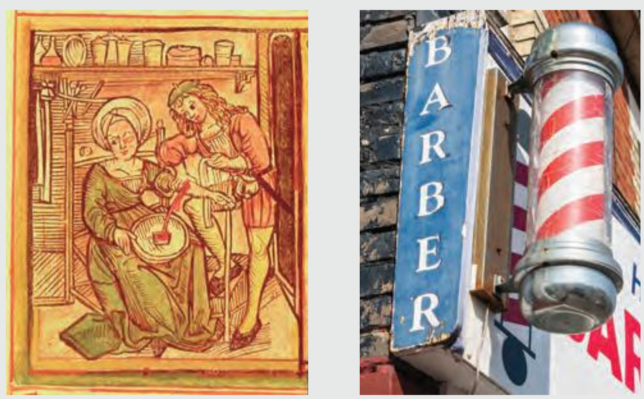
The concept of cause and effect is used by historians to identify chains of events and developments, both in the short term and in the long term. Cause and effect aims to identify, examine and analyse the reasons why events have occurred and the resulting consequences or outcomes. It helps to think of cause and effect as the 'why' and 'what' of history.

Source 1 The plague known as the Black Death (cause) is estimated to have killed over 75 million people across Europe, Asia and Africa, resulting in a sudden drop in population (effect).

Continuity and change

Historians recognise that over time, some things stay the same while others change. This concept is referred to as continuity and change. Examples of continuity and change can be seen across every civilisation and any given period of time.

Historians refer to aspects of the past that have remained the same over time as continuities. Aspects of the past that do not stay the same are referred to as changes. Change can occur within a certain civilisation or specific time period, but also across different civilisations and time periods.



Source 2 In medieval Europe, barber shops for cutting hair were common, as they are today (a continuity). However, medieval barbers also performed medical procedures (a change) such as bloodletting (see left). The red-and-white spiral on modern-day barber poles (see right), dates back to when bloodstained bandages were hung out to dry on poles after bloodletting at medieval barber shops.

Evidence

Evidence is the information gathered from historical sources. Evidence can come from many different sources; for example, films, maps, newspapers, buildings, nursery rhymes and clothing.

There are two types of sources:

- *Primary sources* are things that existed, or were written or made, at the time being investigated. Examples of primary sources include human remains, artefacts, official documents (such as laws and treaties) and personal documents (such as diaries and letters). These original, first-hand accounts are analysed by historians to answer questions about the past.
- *Secondary sources* are accounts about the past that were created after the time being investigated. They often use or refer to primary sources and present a particular interpretation of them. Examples of secondary sources include documentaries, history textbooks and websites.

Historians often have different points of view and do not always agree on evidence. This is why historians are constantly searching for new sources of evidence – they need to use a range of different sources to help them gain a more complete picture of the past.

Source 3 This Viking stone carving, known as the Tjängvide image stone, was carved during the eighth century CE. It shows gods from Norse mythology and a Viking longship. It is a primary source because it was made during the Viking Age. The remains of several Viking longships confirm this representation.

Source 4 This illustration from a children's book published in 1928 shows a young Viking returning to the Viking homeland. It is a secondary source because it was created long after the Viking Age. Although a number of historically accurate features are shown (such as the design of the longships), it is not a reliable source of evidence because its purpose is to entertain.

Significance

The concept of significance relates to the importance assigned to aspects of the past, such as events, developments, discoveries, movements, people and historical sites. History is full of important events, significant people and interesting places. We need to make a judgment about which of these to study. To determine if an event, development, discovery, movement, person or site is historically significant, historians may ask the following questions:

- How important was this to people who lived at that time?
- How did this affect people's lives?
- How many people's lives were affected?
- How widespread and long-lasting were the effects?
- Can the effects still be felt today?

Source 5 This statue of Genghis Khan, ruler of the Mongol Empire from 1206 to 1227 CE, is over 40 metres high. While Genghis Khan ruled the Mongol Empire for a relatively short period of time, the changes he introduced are considered significant because they affected enormous numbers of people over a vast area of the world.

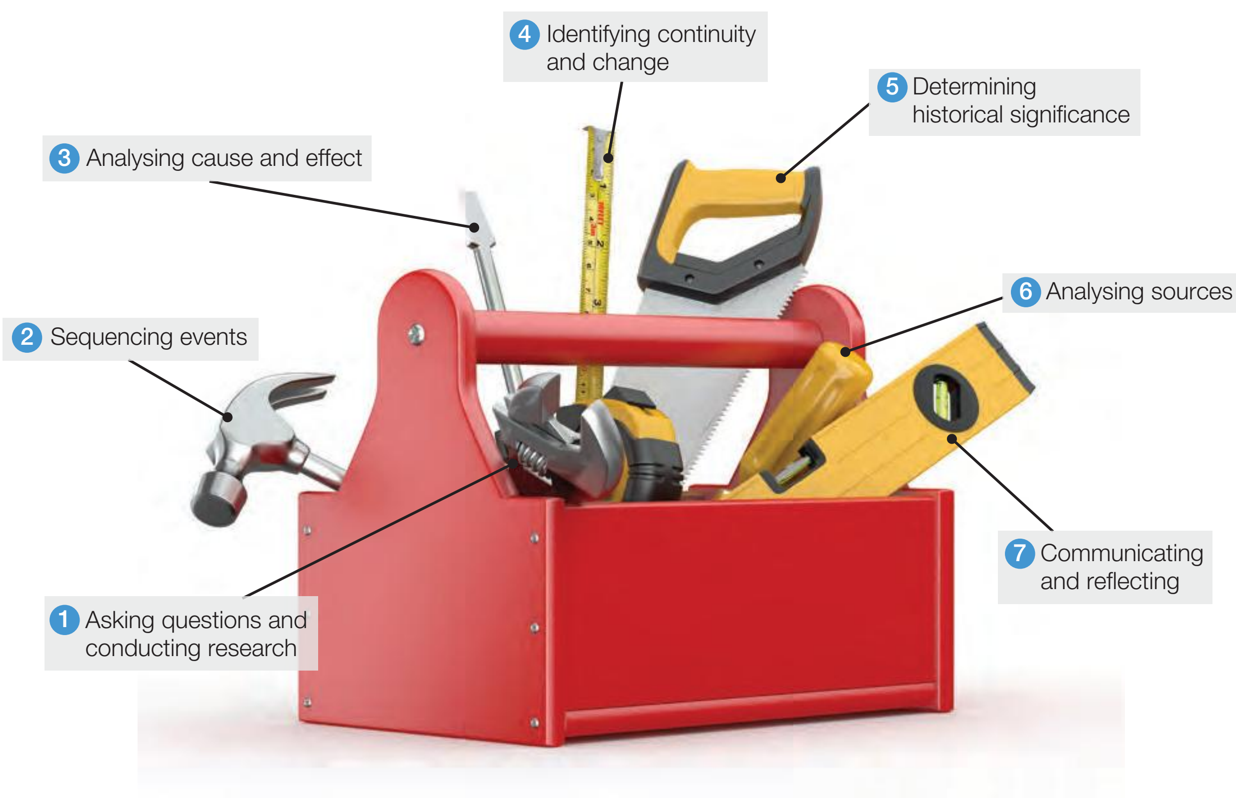
7.2 Historical skills

Historians examine the past and try to explain what they find. There are a number of key skills that historians use to successfully investigate the past. They are:

1. Asking questions and conducting research
2. Sequencing events
3. Analysing cause and effect
4. Identifying continuity and change
5. Determining historical significance
6. Analysing sources
7. Communicating and reflecting

Each of the skills you will learn over the course of this year is explained in this chapter, and by studying history you will gradually master each one. You will understand some of them quickly; others may take a little longer. As you develop each new skill you will have gained another important tool for understanding and explaining events and people that have shaped our world.

It might help you to think of each of these skills as individual tools in your toolkit.



Source 1 Historians use several different skills. Each of these skills is like a tool in a toolkit.

7.3 Asking questions and conducting research

Asking a range of questions about the past

hypothesis
a considered theory or statement, based on research and evidence, about something that has not been proven (plural: hypotheses)

One way to understand the past is to undertake a historical inquiry. A historical inquiry is a process of asking questions, finding and analysing sources, and using evidence from sources to develop an informed explanation about the past. Historians begin any historical inquiry by asking big questions. From these big questions, historians develop a **hypothesis** about what events took place, why, where, and who was involved.

KEY SKILL
Asking questions & conducting research

Generating questions

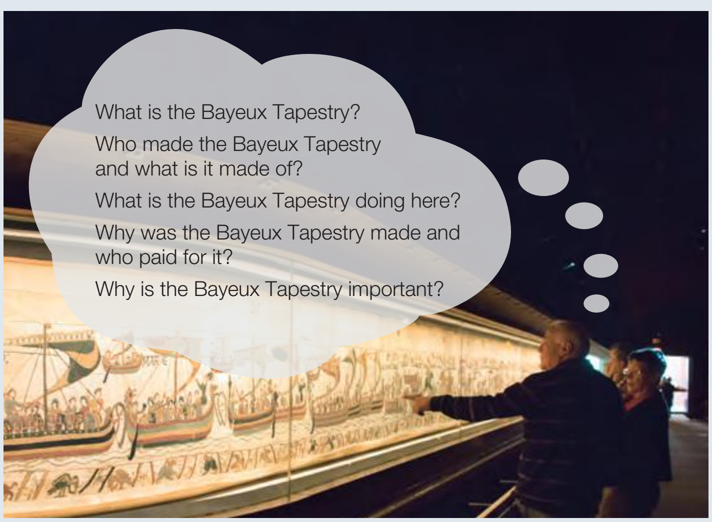
Look closely at Source 2. This visitor looking at the Bayeux Tapestry is asking some important questions. You can learn to do this too by starting your questions with the words 'what', 'where', 'how', 'when' and 'why', for example:

- What is the Bayeux Tapestry?
- Who made it?
- When was it made?

The best questions open up an exciting area for you to explore. For example, the visitor might ask a simple question, such as: 'What does the Bayeux Tapestry look like?' This is a question with a relatively simple answer. A better historical question for the visitor to ask might be: 'What does the design and construction of the Bayeux Tapestry tell us about the skills of people living in medieval Europe?' This question opens up a whole new area for exploration.

Practise the skill

1 Generate four questions of your own that will help you research the Bayeux Tapestry.
2 Once you have generated your questions, **identify** the information you will need to answer these questions and where you might be able to locate it.
3 Are there any questions for which you have not been able to find reliable evidence or answers? What reasons might there be for this?



Source 2 Developing historical questions is an important part of every historical inquiry.

Finding relevant sources

Sources provide information for historians. Locating relevant sources is a valuable skill that usually involves a number of different research methods, such as:

- using an online search engine such as Google
- visiting museum and government websites
- looking at newspaper and magazine archives
- contacting local historical societies
- interviewing older family members about the past.

Source 3 Research is an important part of history. Your teacher or librarian can help you develop your research skills, both for the library and online.

Locating relevant sources online

While books and newspapers are valuable sources of information, most research today is conducted online. Your teacher or librarian can help you to develop good research skills. To make sure that sources gathered online are accurate, reliable and relevant, follow the guidelines below:

- Search engines are useful research tools, but much of the material found online is not reliable and may contain inaccurate and misleading information, or material that is out of date. When using search engines, use keywords and be as specific as you can.
- Use sites linked to educational institutions, government departments, reputable companies, museums and universities to find reliable information. A quick way of telling if a site is reputable is to look at the suffix of the domain name, which is part of the URL (internet address).
- Avoid blogs or social media posts. If you do find information on a blog or social media site, be sure to verify it by using a more reliable source.
- Never cut and paste information you find online straight into your own work. Taking someone else's work, ideas or words and using them as if they were your own is called plagiarism, and can have very serious consequences.

Source 4 Some common domain suffixes

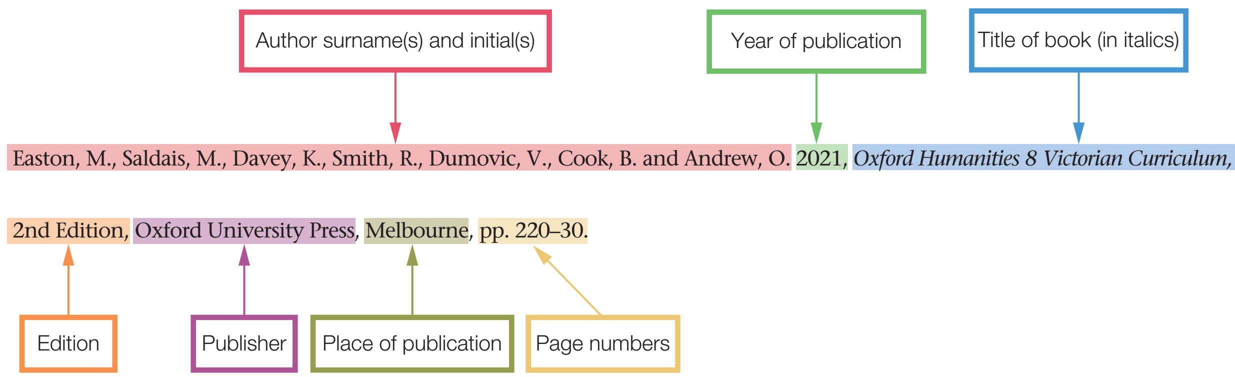
Domain suffix	Description
.edu	The site is linked to an educational institution, such as a university or school. These sites are generally very reliable.
.gov	The site is linked to a government institution. These sites are generally very reliable.
.net	The site is linked to a commercial organisation or network provider. Anyone can buy a domain name with this suffix, and generally nobody regulates the information posted on the site. As a result, these sites may be unreliable.
.org	The site is linked to an organisation. Generally, these organisations are not-for-profit (e.g. Greenpeace, World Vision International, British Museum). If the organisation is reputable and can be contacted, it generally means that the information provided has been checked and verified by that organisation. You need to be aware of any special interests that the organisation may represent (e.g. particular religious, commercial or political interests), as this may influence what it has to say on a particular issue.
.com	The site is linked to a commercially based operation and is likely to be promoting certain products or services. Domain names with this suffix can be purchased by anyone, so the content should be carefully checked and verified using another, more reliable source.

Recording relevant sources

As you identify and locate relevant sources, it is essential that you record details to include in your list of references or bibliography.

When citing (mentioning) a book in a bibliography, include the following, if available, in this order:

1. author surname(s) and initial(s)
2. year of publication
3. title of book (in italics)
4. edition (if relevant)
5. publisher
6. place of publication
7. page number(s).



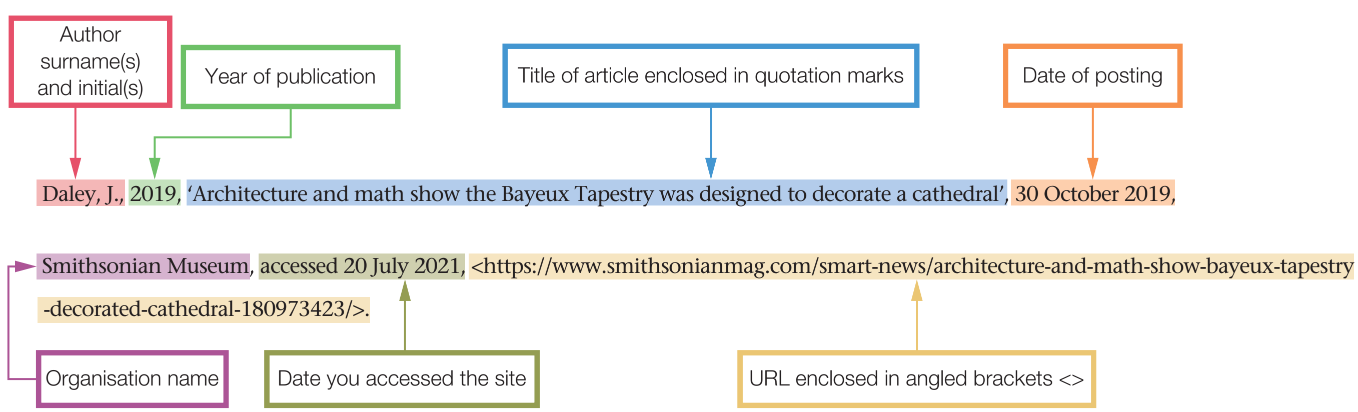
Source 5 An example of how to cite a book in a bibliography

When citing an online source in a bibliography include the following information, if available, in this order:

1. author surname(s) and initial(s) or organisation name
2. year of publication or date of webpage (last update)
3. title of document (article) enclosed in quotation marks
4. date of posting
5. organisation name (if different from author name)
6. date you accessed the site
7. URL or web address enclosed in angled brackets <>.

Check your learning

Log onto your obook pro to complete the questions for topic 7.3.



Source 6 An example of how to cite an online source in a bibliography

7.4 Sequencing events

Ordering significant events

One of the most helpful things historians can do to get a better understanding of the past is to organise events in the order that they happened. This is known as chronology. Chronology can help us organise things that happened over a small period of time, such as a day or week, or huge periods of time, such as hundreds of thousands of years. We can also use chronology to look at events that happened in one place or society, or to compare events across many different places and societies.

Chronology allows us to develop an ordered sense of time. Once events have been placed in **chronological order**, we are able to use a range of historical concepts such as cause and effect, significance, and continuity and change to analyse them in detail.

chronological order the order in which events have taken place

Sequencing time

Examples of how historians sequence time are shown in Sources 7 and 8. Each table shows how 2100 years have been divided into smaller periods of 100 years, which are known as centuries. These tables will help you as you work through Year 8 history, so refer to them as often as you need to.

Source 7 Before the Common Era (BCE): more than 2000 years of history divided into centuries; zero is not used, so when ordering time BCE, remember to count backwards to 1.

Century BCE	Time period	Century BCE	Time period	Century BCE	Time period
21st century BCE	2100 to 2001	14th century BCE	1400 to 1301	7th century BCE	700 to 601
20th century BCE	2000 to 1901	13th century BCE	1300 to 1201	6th century BCE	600 to 501
19th century BCE	1900 to 1801	12th century BCE	1200 to 1101	5th century BCE	500 to 401
18th century BCE	1800 to 1701	11th century BCE	1100 to 1001	4th century BCE	400 to 301
17th century BCE	1700 to 1601	10th century BCE	1000 to 901	3rd century BCE	300 to 201
16th century BCE	1600 to 1501	9th century BCE	900 to 801	2nd century BCE	200 to 101
15th century BCE	1500 to 1401	8th century BCE	800 to 701	1st century BCE	100 to 1

Source 8 Common Era (CE): more than 2000 years of history divided into centuries; zero is not used, so when ordering time CE, remember to count forwards from 1.

Century CE	Time period	Century CE	Time period	Century CE	Time period
1st century CE	1 to 100	8th century CE	701 to 800	15th century CE	1401 to 1500
2nd century CE	101 to 200	9th century CE	801 to 900	16th century CE	1501 to 1600
3rd century CE	201 to 300	10th century CE	901 to 1000	17th century CE	1601 to 1700
4th century CE	301 to 400	11th century CE	1001 to 1100	18th century CE	1701 to 1800
5th century CE	401 to 500	12th century CE	1101 to 1200	19th century CE	1801 to 1900
6th century CE	501 to 600	13th century CE	1201 to 1300	20th century CE	1901 to 2000
7th century CE	601 to 700	14th century CE	1301 to 1400	21st century CE	2001 to 2100

Creating a timeline

Timelines are used by historians to sequence time and order important events chronologically. They help divide large sections of time into smaller periods so that events can be arranged in the correct order. Timelines can look quite different, but they all work in the same way.

Follow these steps, and refer to Source 9, when constructing a timeline:

Step 1 Work out the length of time you want to represent on your timeline, and then divide it evenly into suitable blocks of time.

Step 2 To represent a huge span of time, you may need to break your timeline into sections using a jagged line. This break shows that a section of time has been left out. Just make sure no important events fall in the time you are leaving out.

Step 3 Mark specific dates onto the timeline. These dates need to be accurately plotted so that they appear in chronological order (from left to right). If an exact date is not known, the abbreviation *c*. (from the Latin word *circa*, meaning 'around') is placed in front of it (for example, *c*. 250 BCE).

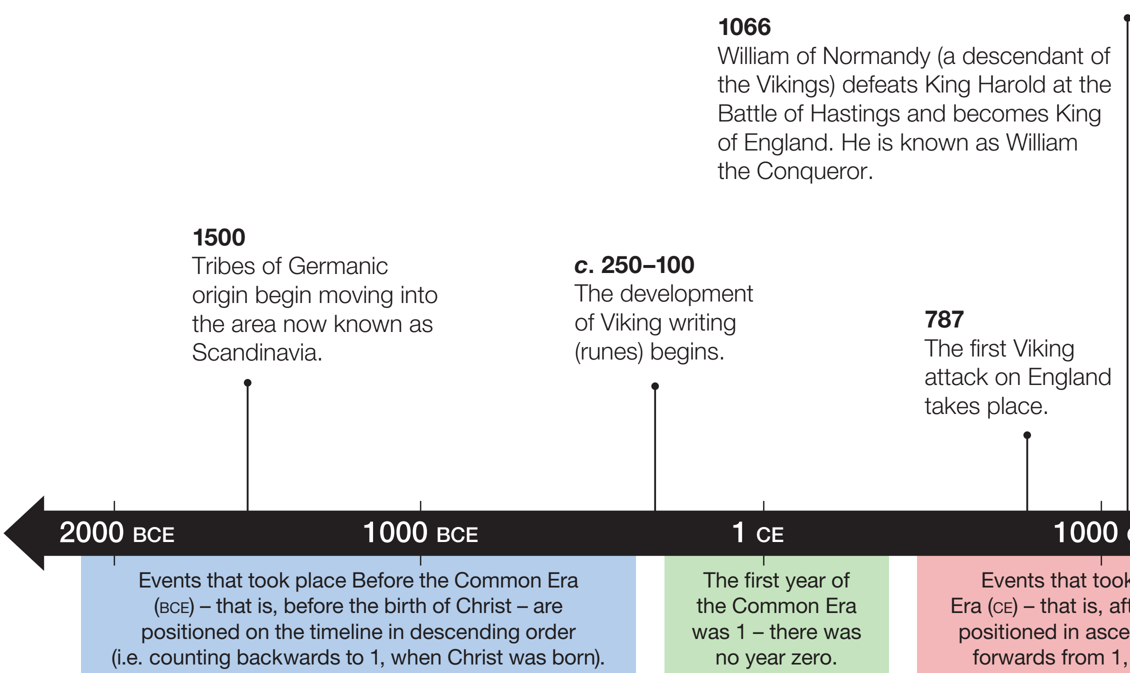
Step 4 Plot important dates and events on the timeline. Give a brief description of each event. Include pictures and captions, if appropriate.

Practise the skill

1 **Create** your own timeline based on one of the following topics:
- important events that have taken place in your life so far
- events in the life of someone important in your life (for example, a family member, a close friend or someone you admire).

KEY SKILL
Sequencing events

Check your learning
Log onto your obook pro to complete the questions for topic 7.4.




William the Conqueror, from the Bayeux Tapestry

Source 9 An example of a simple timeline, with some reminders

7.5 Analysing cause and effect

Understanding cause and effect

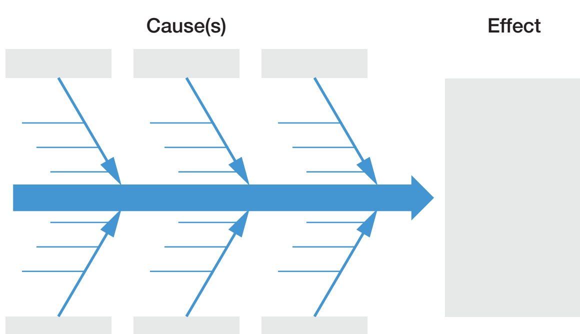
Cause and effect is used by historians to identify the reasons for an event, or changes in history, and the results of those events or developments, both in the short term and the long term. Sometimes the link between cause and effect is very clear. For example, heavy rain over many weeks (cause) leads to flooding and the destruction of crops (effect). However, often this link is not quite so obvious. Generally, there are many causes (reasons) that lead to an event or action, and there can also be many effects (outcomes). Sometimes the effects are simple to identify, while in other cases they are more difficult to predict and may not even be observed until long after the event.

Analysing cause and effect

When you analyse something, you must break it down into smaller parts and explain how they relate to each other. The first step in analysing cause and effect is to identify the cause. Different types of causes might be social, economic or political, or a cause might be sudden, and act as a catalyst (a trigger) for change. Once the cause has been identified, consider the effects. Explain how each effect is linked to the cause that you have identified. Remember, historical events can have multiple causes, and multiple effects.

When analysing cause and effect, it can be helpful to organise the information in a way that helps you to see the links between cause and effect. Fishbone diagrams (see Source 10) and cause and effect trees (see Source 11) are two examples of graphic organisers that can be used when analysing cause and effect.

Timelines can also be used to organise events, people and movements in a way that helps you identify links between cause and effect.



Source 10 A fishbone diagram

Source 11 A cause and effect tree

Analysing the cause and effect of the Black Death

During the fourteenth century, a plague known as the Black Death swept across Europe, Asia and parts of Africa. Historians estimate that at least 75 million people died as a result. A number of factors led to the rise and spread of the Black Death. Bubonic plague (the most common form of plague) was spread by fleas infected with a bacterium known as *Yersinia pestis* (cause). These fleas lived on black rats, commonly found in all medieval towns and cities because of poor hygiene and sanitation (cause). Bites from the infected fleas spread the disease to humans (cause). Pneumonic plague (another form of plague) was spread from person to person through the air, infecting bodily fluids such as mucus and blood (cause). The Black Death resulted in a range of effects.

Short-term effects included:

- a massive drop in population, resulting in shortages of farm labourers and skilled tradespeople
- abandoned houses left dirty and unattended, and rubbish and sewage in towns left to rot
- some priests refusing to bury victims of the plague for fear of contracting the disease.

Long-term effects included:

- the breakdown of feudalism across Europe, because labourers and tradespeople could demand better conditions and higher wages (instead of working in return for the protection of feudal lords)
- a reduction in the power and influence of the Church on people's lives, due to the belief that the Church (including priests and clergy) had not been able to prevent the plague
- improvements in hygiene and medical knowledge due to new regulations and laws introduced to prevent further infections.

Practise the skill

1 **Identify** two forms of the plague known as the Black Death.
2 **Identify** three *causes* of the Black Death.
3 **Outline** two short-term *effects* of the Black Death.
4 **Explain** one long-term *effect* of the Black Death, and how it is related to one of the short-term effects you have outlined.
5 Use a cause and effect tree to record one cause and multiple effects of the Black Death in Europe.

Source 12 A medieval illustration of a couple with the plague; the Black Death had short-term effects and long-term effects.

KEY SKILL
Analysing cause & effect

plague
a widespread disease with a high death rate

feudalism
a set of legal and military customs that served to organise the society of medieval Europe and Japan

Check your learning
Log onto your obook pro to complete the questions for topic 7.5.

7.6 Identifying continuity and change

Understanding continuity and change

Historians recognise that over time, some things stay the same, while others change which, as we have seen, is an important concept in the study of history (see page 200). This is referred to as continuity and change. Examples of continuity and change can be seen across every civilisation, and any given period of time. Historians refer to aspects of the past that have remained the same over time as continuities. Aspects of the past that do not stay the same are referred to as changes. Change can occur within a certain civilisation or specific time period, but also across different civilisations and time periods. Many aspects of history influence how we act and live today.

Identifying continuity and change

To identify continuity and change, the sequence (order) of events and significance of these events (or people, or ideas) should be understood. Timelines can be used to organise events in a way that makes it clear when things changed. Timelines can also be used to understand how long things continued without changing.

Once you have identified when changes occurred in a society or civilisation over a period of time, you can identify what these changes were. These changes can be listed, and ranked in order of significance. To understand the significance of an event, refer to the key concept of significance (see page 201) and to the key skill of determining historical significance (see page 212). When ranking changes in order of significance, you should use evidence to justify how significant (or not) these changes were to the society or civilisation.

After a change (or continuity) has been identified, state what caused the change, and why it had the effect it did. It is important to look at multiple different examples of continuity or change within a society or civilisation to be able to see any patterns of continuity and change.

KEY SKILL
Identifying continuity & change

Identifying continuity and change in fighting pandemics

A pandemic is a global outbreak of disease. In a pandemic, a disease is widespread through a country, or the world. There have been many pandemics throughout history, from the Black Death in the fourteenth century, to the Spanish flu pandemic in the twentieth century and more recently the COVID-19 pandemic. During earlier pandemics such as the Black Death, people had no idea why they were dying. They knew nothing about germs or bacteria. The cause of the Black Death (the bacterium *Yersinia pestis*) was not discovered until the late 1800s. In the fourteenth century, bad smells were commonly considered to be one cause of disease. To protect themselves from bad smells, people carried small bunches of flowers, or pouches filled with fragrant herbs or spices. Today we know far more about many diseases.

Source 13 shows how plague doctors dressed. Heavy floor-length coats extended up the back of the head. They wore a hat, and a bird-like beak, which was filled with strong-smelling items such as mint, spices, garlic, flowers or vinegar. They also used wooden canes to examine plague patients without having to touch them. Source 14 shows how a modern healthcare worker might dress, when required to wear personal protective equipment.

Practise the skill

1. **Identify** two items of clothing or objects that the plague doctor in Source 13 is wearing that modern healthcare workers do not wear today.
2. Briefly **explain** why modern healthcare workers no longer wear the things you have identified. To explain this example of a change:
   - Calculate how much time (in centuries) has passed between the events of the Black Death and the start of the COVID-19 pandemic.
   - Suggest what change in medical knowledge or ideas has occurred between the Black Death and now. You may need to conduct research to find the answer.
   - Decide how significant this change in medical knowledge or ideas has been to human history.
3. **Outline** one example of a continuity between how the plague doctor shown in Source 13 is dressed and how the modern healthcare worker shown in Source 14 is dressed. Why do you think this aspect of fighting pandemics has continued?

Source 13 A nineteenth-century illustration of a typical plague doctor; some earlier medieval plague doctors were similarly dressed.

Source 14 A 2020 photo of a healthcare worker, wearing full personal protective equipment

Check your learning

Log onto your obook pro to complete the questions for topic 7.6.

7.7 Determining historical significance

Analysing significance

The concept of significance relates to the importance assigned to aspects of the past.

The 5Rs of historical significance can be used as a checklist to analyse the significance of something. They can also be used to help you structure your response. Source 15 outlines each of the 5Rs, and Source 16 is a sample response that shows you how to use this approach.

R	Remarkable – what was the most notable thing about the event/individual/group of people?
R	Resulted in change – what happened as an immediate result of the event/individual/group of people? (Think about short-term impacts.)
R	Revealing – what does the event/individual/group of people tell us about the time period?
R	Resonates – how has the event/individual/group of people had an effect on future generations? (Think about long-term impacts.)
R	Remembered – how is the event/individual/group of people remembered today? (Think about evidence that still exists.)

Source 15 The 5Rs of historical significance

The Japanese policy of *sakoku* ('locked country') in 1623 was remarkable as it closed off the entire country from the rest of the world for over 200 years. It resulted in change by preventing any Western influences from influencing Japanese traditions and culture. However, it also meant that the Japanese were unaware of major advances in technology that were taking place in the world during this time. *Sakoku* reveals the national pride felt by all living within Shogunate Japan and how greatly the Japanese valued their country's customs. It also reveals how insecure the shogun leaders were in maintaining their position. *Sakoku* resonated in the long term by contributing to the end of shogunate rule and sparking massive industrialisation, led by Emperor Meiji. To this day, *sakoku* is remembered for establishing strict migration laws in Japan.

Source 16 A sample analysis of the significance of the Japanese policy of *sakoku*; the coloured highlights show how the 5Rs have been used.

Check your learning

Log onto your obook pro to complete the questions for topic 7.7.

7.8 Analysing sources

Worksheet
Using a source evaluation chart to compare sources

You have already learnt that historians use two types of sources to gather evidence about the past:

- *primary sources* – things that existed, or were written or made, at the time being investigated; for example, during an event or very soon after
- *secondary sources* – accounts about the past that were created after the time being investigated; these often use or refer to primary sources and present a particular interpretation of them.

Understanding the origin and purpose of primary and secondary sources

Both primary and secondary sources are useful, but it is important to understand where they came from (origin) and why they were created (purpose), because they will almost always reflect the perspective of the person who made them, as well as the attitudes and beliefs of that time. All sources are affected by the author's own point of view, and in some cases the author may have been paid or forced to write in a particular way or to ignore certain facts. This is referred to as **bias**, and is often aimed at persuading the reader to agree with the author's point of view.

bias
a pre-set view about someone or something that is not altered by the presentation of facts and opinions to the contrary

Analysing sources by asking questions

Analysing sources by asking 'who', 'what', 'when' and 'why' questions will help you identify their origin and purpose.

Source 17 Examples of questions to help identify the origin and purpose of sources

Who	Who wrote, produced or made the source?	• Is the creator's personal perspective obvious in the source? • Is the creator a member of a particular group, religion or organisation?
What	What type of source is it?	• Was the source created at the time of the event or afterwards?
When	When was the source written, produced or made?	• How old is the source? • Is it an eyewitness account or is it written by someone at a later date? • Is the source complete?
Why	Why was it written or produced?	• Was it designed to entertain, persuade or argue a point of view? • Does the creator have anything to gain personally from the source? • What other events happening at the time might have influenced the author or source?

Understanding different perspectives, attitudes and values

Using empathy

Empathy helps us to understand the impact of past events on a particular individual or group, including their circumstances and the motivations, values and attitudes behind their actions. Empathy is the ability to 'walk in someone else's shoes' – to be aware of, and sensitive to, their feelings, thoughts and experiences.

Understanding perspectives

Perspective is a point of view – the position from which people see and understand events going on in the world around them. People will have different points of view (or perspectives) about a particular event, person, civilisation or artefact depending on their age, gender, social position, and their beliefs and values.

Historians also have perspectives that can influence their interpretation of the past and the way in which they write about it. Despite their own perspectives, historians must try to understand the different values and beliefs that shaped and affected the lives of people who lived in the past.

Source 18

Then King William came from Normandy into Pevensey [a town on the coast of England], on the eve of the Feast of St Michael, and as soon as they were fit, made a castle at Hastings market-town. Then this became known to King Harold and he gathered a great raiding-army, and came against him at the grey apple-tree. And William came upon him by surprise before his people were marshalled. Nevertheless the king fought very hard against him with those men who wanted to support him, and there was a great slaughter on either side. There were killed King Harold, and Earl Leofwine his brother, and Earl Gyrth his brother, and many good men.

Extract from the *Anglo-Saxon Chronicle* recounting the events of the Battle of Hastings

Analysing different perspectives, attitudes and values

Both primary and secondary sources can show many different points of view, attitudes and values. The Battle of Hastings provides good examples of how different perspectives can be reflected in historical sources, such as Sources 18 and 19.

Both primary and secondary sources can show many different points of view, attitudes and values.

- Source 18 tells the story of the Battle of Hastings from the perspective of the Anglo-Saxons (from England).
- Source 19 shows a scene from the Battle of Hastings from the perspective of the Normans (from France).

Sources 18 and 19 illustrate how the same event can be told in different ways, depending on the perspectives of the people who were there. For example, Source 19 shows Norman and Anglo-Saxon troops prepared for battle, but Source 18 tells how William of Normandy 'came upon him [King Harold] by surprise'.

It is only when we consider a range of different perspectives and examine all of the available sources that we can begin to form a more complete picture of the Battle of Hastings. A good way to do this is to compare the two perspectives directly, as in Source 20.

Source 19 A section of the Bayeux Tapestry recounting the events of the Battle of Hastings; Norman soldiers are shown on horseback and Anglo-Saxon soldiers are shown on foot.

Source 20 A comparison of two historical sources relating to the Battle of Hastings in 1066

Source 18: The *Anglo-Saxon Chronicle* – an English source	Source 19: The Bayeux Tapestry – a Norman source
• The *Anglo-Saxon Chronicle* is the main source of English history at the time of the Battle of Hastings. • The chronicle is a kind of calendar of national life written by English monks in a number of different places across England. • Unfortunately for historians, there are gaps in the chronicle, and the Battle of Hastings is only mentioned briefly. • Because the English army lost the battle, and Harold Godwinson was killed, it is more difficult for English perspectives of the event to be taken as fact.	• Most historians believe the Bayeux Tapestry was commissioned by William the Conqueror's half-brother, Bishop Odo of Bayeux. • The tapestry provides a huge amount of detail for historians, both visually and in written accounts in Latin at the top and bottom of the cloth. • Because the Norman army won the battle, and William was crowned king, it is easier for the tapestry to present the events as fact.

Drawing conclusions about the usefulness of sources

A useful source is one that adds to your understanding of a historical inquiry. The source needs to be reliable and relevant to the topic. The following questions will help determine the usefulness of a source:

- Is it a reliable source?
- Is there enough information to help me answer the inquiry question?
- Does the information support and reinforce evidence from other sources?
- Is it balanced, or does it present one point of view (meaning, is it biased)?
- Is it based on fact or opinion?
- Is the information current?

Source 21 This illustration of the Battle of Hastings is from the nineteenth century. How useful do you think it is as a historical source?

Separating fact from opinion

Often, you will need to separate fact from opinion in a source.

- A *fact* is something that can be proved: when an event took place, what happened and who was involved.
- An *opinion* is based on what a person may believe to be true.

Look closely at the language used. The use of words such as 'might', 'could' and 'think' all indicate that an opinion is being expressed. For example:

- *Fact:* 'The Bayeux Tapestry is an important historical source.'
- *Opinion:* 'The Battle of Hastings might be the most important battle ever fought.'

Understanding contestability

The concept of contestability relates to explanations or interpretations of past events that are open to debate. Historians around the world often have access to very different sources. Artefacts, such as cave paintings or artworks, may have been damaged or incomplete. Written records may contain errors or have been changed or falsified after they were written. Even historians studying the same sources can sometimes come to different conclusions about what the evidence is telling them. This is one of the exciting things about history – there is often no right answer, and historians are always seeking a more complete understanding of the past.

Analysing sources using 'DAMMIT U'

As we have learnt, an important skill in history is the ability to analyse sources for clues and insights about the past.

The term 'source analysis' is used a great deal in the study of history. But the fact is, there are different ways to analyse sources, or different 'things' that you might look for and discuss in any given source. These include:

- the date, author, material, motive, intended audience, tone and usefulness ('DAMMIT U') of a source
- the different perspectives, attitudes and values presented by a source
- the significance of a source.

Imagine that you have been asked to analyse the image in Source 22. Between the source itself and the information contained in the caption, there is a lot for you to interpret and analyse – however, it can be difficult to know how to start.

Using an acronym, such as 'DAMMIT U', can make it easier to know what you should be looking for, and what questions you should be asking. Read the steps in Source 23 closely to see what each word means and how it can help you begin analysing the source.

Source 22 *The Adoration of Mary*, illuminated manuscript, *c.* 1475; created on vellum leaf with 28 images of saints, angels, donors, Mary and baby Jesus

Turning your analysis into a written response

When writing your response, the 'DAM' (date, author, material) can be summarised in one to three sentences, whereas the 'MIT' (motive, intended audience, tone) will require a little more detail. You should provide examples from the source to support your analysis in the 'MIT' section.

For a written source, use a short quote from the source and explain its meaning. For a visual source, like Source 22, refer to a feature or symbol in the source and explain why it is relevant. In general, a historical source analysis should form a paragraph of eight to ten sentences.

Discussing the 'U' (usefulness) often requires its own paragraph. You should always discuss at least one strength or weakness, and you may include examples.

Source 24 is an example of a source analysis written in response to the illuminated manuscript in Source 22. Annotations have been provided to show you exactly how you can turn your questions into a written response.

D Date – when was the source created? If it was created during the time you are studying, it is a primary source, but if it was created after that, then it is a secondary source. A primary source may show attitudes or describe an experience, whereas a secondary source is often a factual interpretation.

A Author – who is the author of the source? Think about their gender, age, social status and profession. For example, they could be a historian, a leader, an aristocrat, a soldier or a prisoner.

M Material – is the source written, oral or visual? It could be a newspaper, letter, diary, photograph, textbook, online blog or tweet, or even statistics in the form of a graph or map.

M Motive – why did the author produce this source? Was it for official government use, a religious affiliation, the media or for personal reasons? A historian tries to establish the context of the source to help understand the perspective of the person who created it.

I Intended audience – who was the source produced for? Was it for academics or the general public? Was it intended to be viewed, or was it meant to be private?

T Tone – how is the information in the source expressed? How does it make you feel? Words to describe tone can include 'persuasive', 'critical', 'questioning', 'funny' or 'reflective'. Often, primary sources are more emotional than secondary sources, which tend to be factual as they are written with hindsight.

U Usefulness – what are the strengths and weaknesses of the source as a piece of evidence? Sources can be factual and accurate, or they can be exaggerated and contain bias. They may have the detail of an eyewitness, or the advantage of hindsight. A source may be an oral history, or it may be written down. All of these can affect how useful the source is.

Source 23 The 'DAMMIT U' acronym is a helpful way to remember the questions you should ask yourself when approaching any source.

Date | Material | Author | Motive | Intended audience | Tone | Usefulness

The Adoration of Mary is an illuminated manuscript that was created *c.* 1475 in France. The author is unknown, but was possibly a monk of the Catholic Church. The motive of this source is to show the respect for and the importance of Mary and baby Jesus. This is shown through the large size of Mary and her position front and centre in the artwork. The intended audience for this source may have included royalty, nobles and bishops, and priests. This is because most illuminated manuscripts were kept in church libraries or were made for wealthy families to use as prayer books. The tone of the source is glorifying and magnificent. This is shown through the two figures kneeling in front of Mary, looking up with their hands in a prayer position.

This source is useful to some extent, because it shows us how devoted to religion people in 1475 were. The way the artist has shown Mary sitting on a throne, wearing a crown and a long robe, tells us that people considered religious figures to be like royalty. However, the source is clearly biased as this is the only perspective it shows.

Source 24 A sample response that has been written using the 'DAMMIT U' approach

Check your learning
Log onto your obook pro to complete the questions for topic 7.8.

7.9 Communicating and reflecting

Worksheet
Using historical terms

How to write a description

The purpose of descriptions is to give clear information about people, places or objects at particular moments in time. They focus on the main characteristics of particular people or things.

Descriptions must always follow a set structure, and events must be organised in chronological order.

Source 25

Structure of a description	
Introduction	• Introduces the subject • States the name of the person or event • Outlines why the topic is important
Body	• The body provides details about the person or event (including dates and important facts) • Information must be organised in paragraphs, with a new paragraph for each detail • Quotations and descriptive words must be used where relevant
Conclusion (optional)	• Revisits the most important details and provides a concluding statement

How to write an explanation

The purpose of explanations is to tell how or why something happened. They provide the reader with a greater understanding of the causes and effects of past events. Explanations must be clear and factual. They should not contain opinions or emotional language. There must be supporting evidence from a variety of sources, which are acknowledged in a bibliography using the correct referencing format.

Source 26

Structure of an explanation	
Introduction	• Clearly states the main idea or aim • Briefly outlines the reasons why an event occurred and its effects
Body	• Each idea must be supported by evidence; the evidence should be analysed to explain its significance or importance • Information must be organised in paragraphs, with a new paragraph for each detail • Language should be precise and not contain emotional words • Personal opinions should be avoided
Conclusion (optional)	• Provides a short and clear overview of the main ideas presented in the body • States a conclusion drawn from the evidence

How to write a paragraph using TEEL

When writing a paragraph – either by itself or as a part of an essay – it is important to structure your thoughts logically. The acronym TEEL is a helpful way of remembering how to do this. Read Source 27 carefully to familiarise yourself with each of the steps of TEEL. Then read Source 28 to see an example of a paragraph that has been written using TEEL.

Source 27 The TEEL structure

T	Topic	Introduce your main idea in the first sentence.
E	Explain	Provide some background knowledge on your main idea.
E	Examples	Be sure to use two or three examples in a paragraph. Examples are important in a history essay, as they act as your evidence. Examples include facts and figures, dates, names, places, events, statistics and sources.
L	Link	Sum up your paragraph by providing some analysis or evaluation on the topic. Do this by providing your opinion on the matter. Some ideas for a good link include: • How useful is the evidence you have used? • Did any changes take place because of the example you have used? • Do you need any more evidence to make a proper judgment on the topic? In your link, use linking phrases such as 'overall' or 'ultimately' to help make your final statement.

Source 28 An example of a written response using TEEL, on the impact of the Black Death

T	One major impact of the Black Death on medieval Europe was the change in the way that people saw the role of the Catholic Church in society.
E	Up until then, the Church was very powerful, influential and wealthy. It governed people's behaviour and educated them in what was right and wrong. However, the Church was unable to control or explain the Black Death. In addition, many monks, nuns and priests died from the plague, or fled in fear of becoming infected. This made people feel disappointed and angry towards the Church.
E	As a result, many common people behaved in a careless way without the moral teaching of the Church to guide them. Italian writer Giovanni Boccaccio explained this in the fourteenth century, when he wrote that some 'thought the sure cure for the plague was to drink and be merry, to go about singing and amusing themselves'. Furthermore, this feeling was also captured in the painting *Dance of Death* from the fourteenth century, which shows a knight and a man dancing happily with skeletons.
L	Ultimately, the Black Death weakened the role of the Church in medieval Europe. This caused people to question the Church and seek their own knowledge, which eventually led to the Renaissance era. Even royalty began to question the power of the Church, leading to Protestants establishing new faiths, and a Reformation. While the Black Death did not bring an end to feudalism or the Church, it significantly weakened the Church's role in medieval Europe.

Source 29 Part of a painting called *Danse Macabre* (or *Dance of Death*)

Check your learning

Log onto your obook pro to complete the questions for topic 7.9.

obook pro

CHAPTER 8

Introduction to the European and Mediterranean world

The period between about 590 CE and 1700 CE marks the end of the ancient world and the beginning of the modern world. Across Europe, it was a time of great change. New societies and civilisations grew out of the ruins of ancient civilisations. Different ideas flourished, and ways of thinking about the world were challenged. Towards the end of the period, new inventions were developed, along with new ideas about art, politics, literature, religion and science.

In this chapter, you will learn how different beliefs and religions, social structures, laws and governments influenced societies across the European and Mediterranean world.

Source 1 One of the most important changes across the European and Mediterranean world was the spread of religions. In Europe, Christianity was a central part of life. This enormous stained glass window in Chartres Cathedral in France was built at the height of the medieval period in Europe.

8A

Where and when did civilisations in the European and Mediterranean world develop?

8B

What were the key features of societies in the European and Mediterranean world?

The European and Mediterranean world

This unit offers a choice of three topics:

- The Vikings
- Medieval Europe
- The Ottoman Empire (available on obook pro).

You must choose *at least one* of these topics for study.

8.1 The where and when of the European and Mediterranean world

In this topic, you will:

» explore the origins of different civilisations throughout the European and Mediterranean world.

In this unit you will be learning about different civilisations and events that took place across the European and Mediterranean world. To help you get a better understanding of these civilisations and events, it helps to look briefly at some common factors that influenced each civilisation and think about how their development was linked.

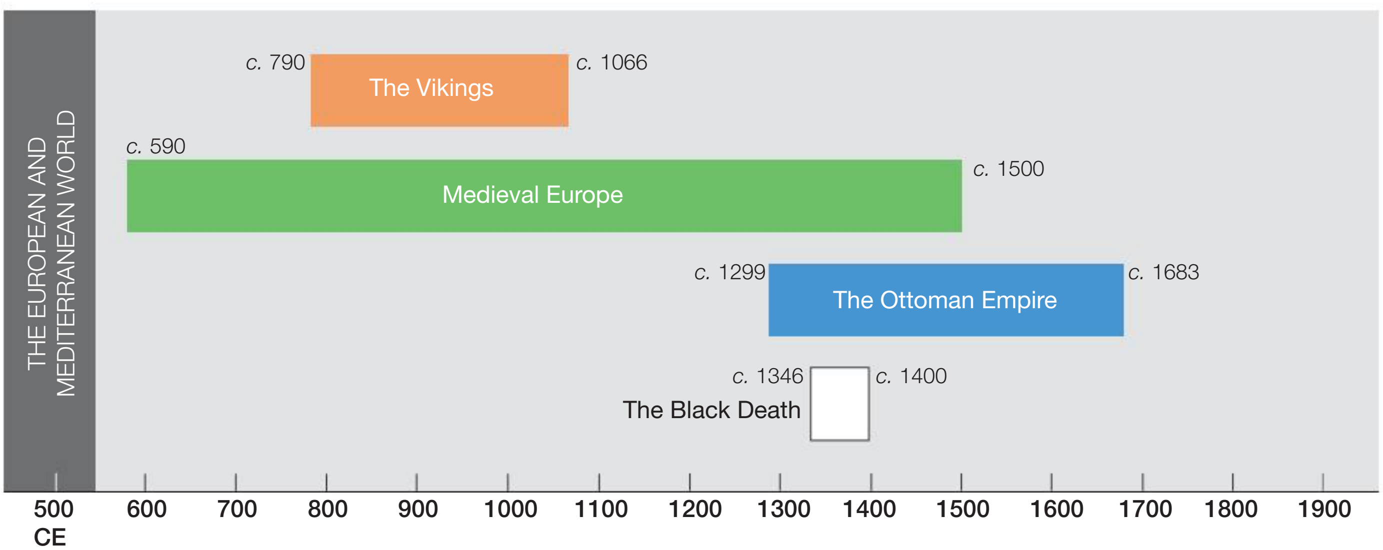
Source 3 shows the location and size of the civilisations you will be learning about in this unit:

- the Viking homelands in a region of northern Europe known as Scandinavia
- the continent of Europe during the **medieval period**
- the territories of the Ottoman Empire when it was at its greatest size
- the areas of the world that were affected by the spread of a deadly plague known as the Black Death during the fourteenth century. The Black Death spread across the world and devastated populations in Asia, Africa and Europe. In Europe alone, it killed 25 million people (about one-third of the total population).

medieval period
another name for the Middle Ages of European history

Sequence this!
Civilisations across the European and Mediterranean world

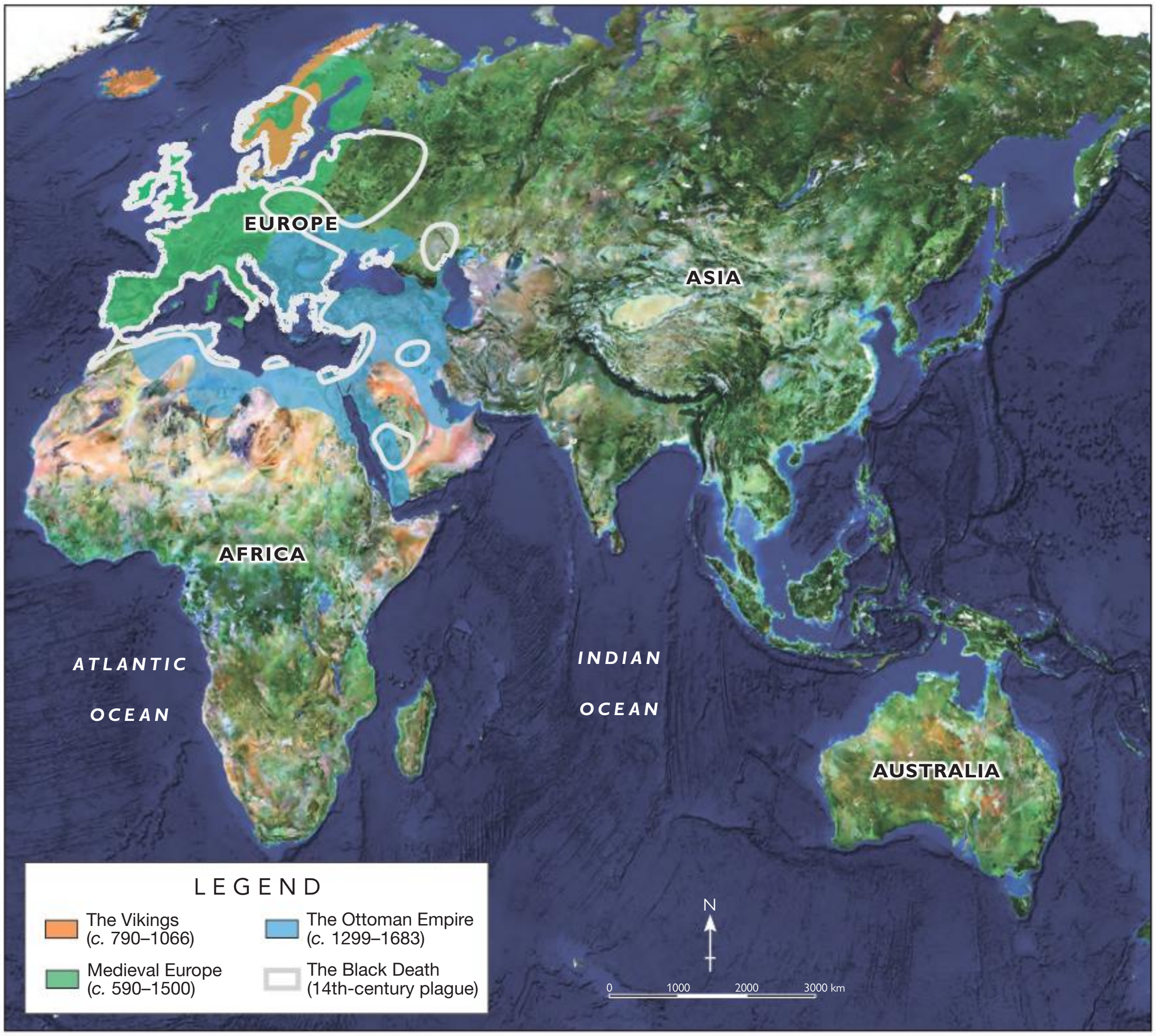
Source 1 This is a replica of a medieval helmet that was found in Suffolk, England, in 1939. It dates back to the late sixth or early seventh century.



Source 2 This timeline shows the rise and fall of civilisations across the European and Mediterranean world.

The dates for each civilisation are shown in the timeline (Source 2). Note that these civilisations did not all exist at the same time. Often, as power changed hands, one civilisation broke down and another was formed in its place on the same lands.

EUROPEAN AND MEDITERRANEAN WORLD: KEY CIVILISATIONS



Source: Oxford University Press

Source 3 This satellite image shows the location and size of key civilisations across the European and Mediterranean world when they were at their peak.

8.1 CHECK YOUR LEARNING

Review and understand

1 Using Source 3, complete the following tasks:

a **Identify** where the Vikings originated.

b **List** the three key civilisations in the European world in this period, in order of geographic size.

c The Ottoman Empire extended well beyond the borders of Europe. **Describe** the area it covered.

2 What was the Black Death? **Describe** how civilisations in the European and Mediterranean world were affected by it.

8.2 The birth of the modern world in Europe

In this topic, you will:

» identify the different groups that moved throughout the European and Mediterranean world.

The civilisations and events you will be learning about this year took place over a period of time starting around 590 CE and ending about 1700 CE. Before this time, much of Europe and the Mediterranean region was controlled by the Roman Empire. Over time, however, Rome's power declined, until the Roman Empire in Europe finally collapsed around 476 CE.

Empires can collapse for many reasons, including wars, natural disasters, invasions, disease, food shortages, government corruption and poor leadership. The collapse of the Roman Empire was the result of a combination of these reasons.

The fall of the Roman Empire left room for different tribal groups to expand their territories and move into Europe. These groups were looking for new regions to settle and riches to take. The Romans called these people **barbarians**. These tribes included the Vandals, the Ostrogoths, the Visigoths, the Vikings, the Franks, and the Angles and Saxons. Other groups, such as the Huns, migrated from further east in Asia, and Arab tribes migrated from the Middle East. Source 4 shows the movement of many different tribal groups across Europe (and parts of Africa and Asia) during the fourth and fifth centuries CE. It also provides some brief information about each of them. This movement had a huge impact on the ways in which new societies formed and developed there.

barbarians
a term used by ancient Romans to describe someone living outside the borders of their empire, whom they considered 'uncivilised'

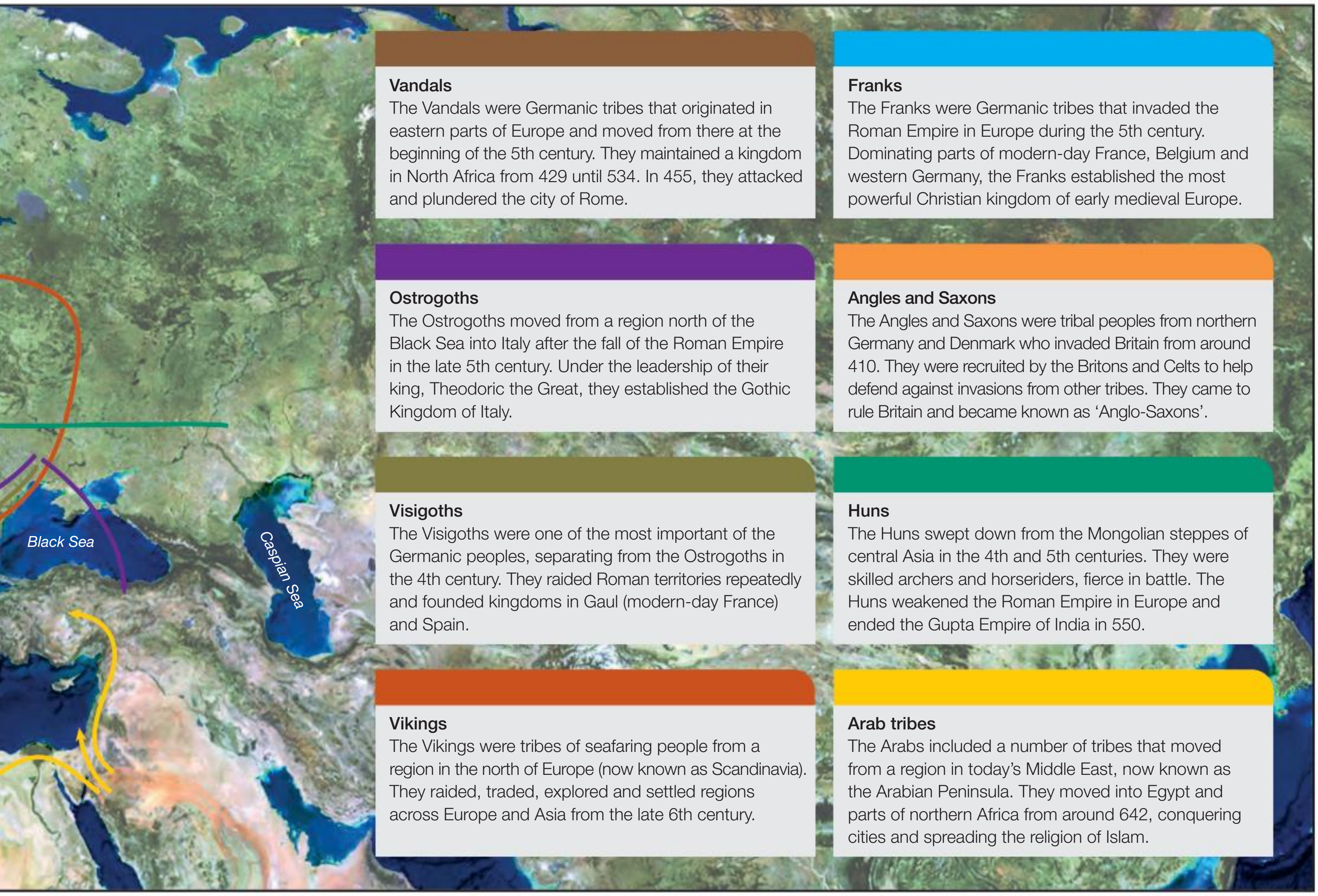
EUROPEAN AND MEDITERRANEAN WORLD: KEY TRIBAL GROUPS

Source 4 This satellite image shows the approximate movements of tribal groups across Europe and the Mediterranean (including parts of Africa and Asia) during the fourth and fifth centuries CE.

To gain new territories, these tribal groups often fought with one another. Without the Roman army to keep the peace and enforce the laws, societies across Europe started to break down. Raids were common, and people had to find new ways to protect themselves and their property.

Although some new societies and civilisations were founded peacefully by local tribes, most others were started through bloody battles by foreign tribes expanding their territory by force. All over Europe, people were on the move and new societies were being established. This moment marked the start of the modern world in Europe.

Quiz me!
A quick quiz on the birth of the modern world in Europe



Vandals
The Vandals were Germanic tribes that originated in eastern parts of Europe and moved from there at the beginning of the 5th century. They maintained a kingdom in North Africa from 429 until 534. In 455, they attacked and plundered the city of Rome.

Franks
The Franks were Germanic tribes that invaded the Roman Empire in Europe during the 5th century. Dominating parts of modern-day France, Belgium and western Germany, the Franks established the most powerful Christian kingdom of early medieval Europe.

Ostrogoths
The Ostrogoths moved from a region north of the Black Sea into Italy after the fall of the Roman Empire in the late 5th century. Under the leadership of their king, Theodoric the Great, they established the Gothic Kingdom of Italy.

Angles and Saxons
The Angles and Saxons were tribal peoples from northern Germany and Denmark who invaded Britain from around 410. They were recruited by the Britons and Celts to help defend against invasions from other tribes. They came to rule Britain and became known as 'Anglo-Saxons'.

Visigoths
The Visigoths were one of the most important of the Germanic peoples, separating from the Ostrogoths in the 4th century. They raided Roman territories repeatedly and founded kingdoms in Gaul (modern-day France) and Spain.

Huns
The Huns swept down from the Mongolian steppes of central Asia in the 4th and 5th centuries. They were skilled archers and horseriders, fierce in battle. The Huns weakened the Roman Empire in Europe and ended the Gupta Empire of India in 550.

Vikings
The Vikings were tribes of seafaring people from a region in the north of Europe (now known as Scandinavia). They raided, traded, explored and settled regions across Europe and Asia from the late 6th century.

Arab tribes
The Arabs included a number of tribes that moved from a region in today's Middle East, now known as the Arabian Peninsula. They moved into Egypt and parts of northern Africa from around 642, conquering cities and spreading the religion of Islam.

Source: Oxford University Press

8.2 CHECK YOUR LEARNING

Review and understand

1 Who were the Angles and the Saxons? **Identify** where they originally came from.

2 **Identify** the tribal group that established the most powerful Christian kingdom in medieval Europe.

3 **Identify** in which modern-day countries the Visigoths established kingdoms.

4 In your own words, **define** 'barbarian' (as this word was used by the ancient Romans).

Apply and analyse

5 **Explain** the effect the fall of the Roman Empire had on people living in Europe and the Mediterranean. Describe the changes in your own words.

8.3 Key features of societies across the European and Mediterranean world

In this topic, you will:

» explore the key features of the European and Mediterranean world, including belief systems and religion, and government, laws and social structures.

Quiz me!
A quick quiz on key features of societies across the European and Mediterranean world

In this unit, you will study *one* of the following topics:

- The Vikings
- Medieval Europe
- The Ottoman Empire.

Before beginning a detailed study into your chosen civilisation, it helps to look briefly at some of the key factors that influenced all the societies across the European and Mediterranean world. It is useful to look at the types of belief systems and religions that were important to each one, as well as the systems of government, laws and social structures that influenced their development.

Belief systems and religions

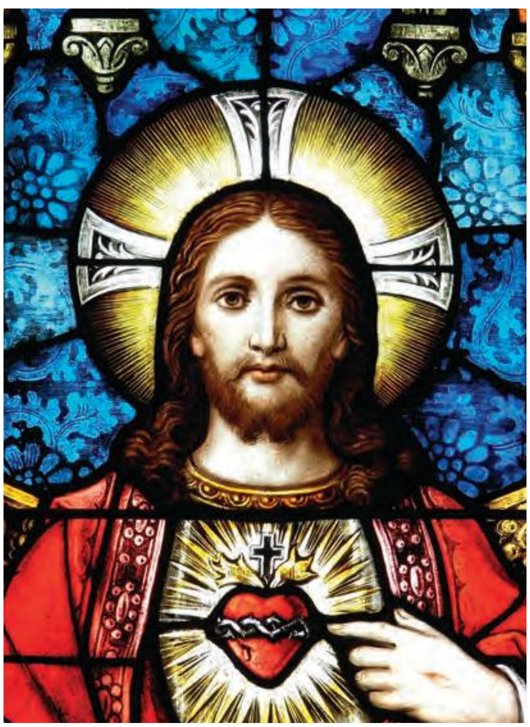
Belief systems and religions were the foundations on which all societies across Europe and the Mediterranean were built. These belief systems influenced almost every aspect of life. The clothes people wore, the foods they ate, the songs they sang and their understanding of the world were all influenced by their beliefs.

Catholic Church
the only Christian Church in Europe until the Protestants started breaking away from Rome in the sixteenth century

The spread of Christianity

Christianity is a religion based on the teachings of Jesus Christ as recorded in the New Testament of the Bible. Christians believed that living according to the word of God ensured that a person's soul would go to heaven, whereas a life of sin would lead to an eternity in hell.

For ordinary people living in Europe, the collapse of the Roman Empire meant they no longer had the protection of Rome's army against barbarian attacks. Christianity offered people hope during this difficult time. Christian missionaries travelled great distances to convert others, including Germanic tribes (such as the Vandals, the Franks and the Visigoths) as well as the Vikings. The **Catholic Church** came to dominate most societies in Europe. Its teachings strongly influenced how people lived their lives.



Source 5 Christianity is based on the teachings of Jesus Christ.

The spread of Islam

Islam is a religion based on a belief in one god, who is known to followers as Allah. Believers of Islam are called Muslims. Muslims believe that Allah created the universe and that humans must submit to his will.

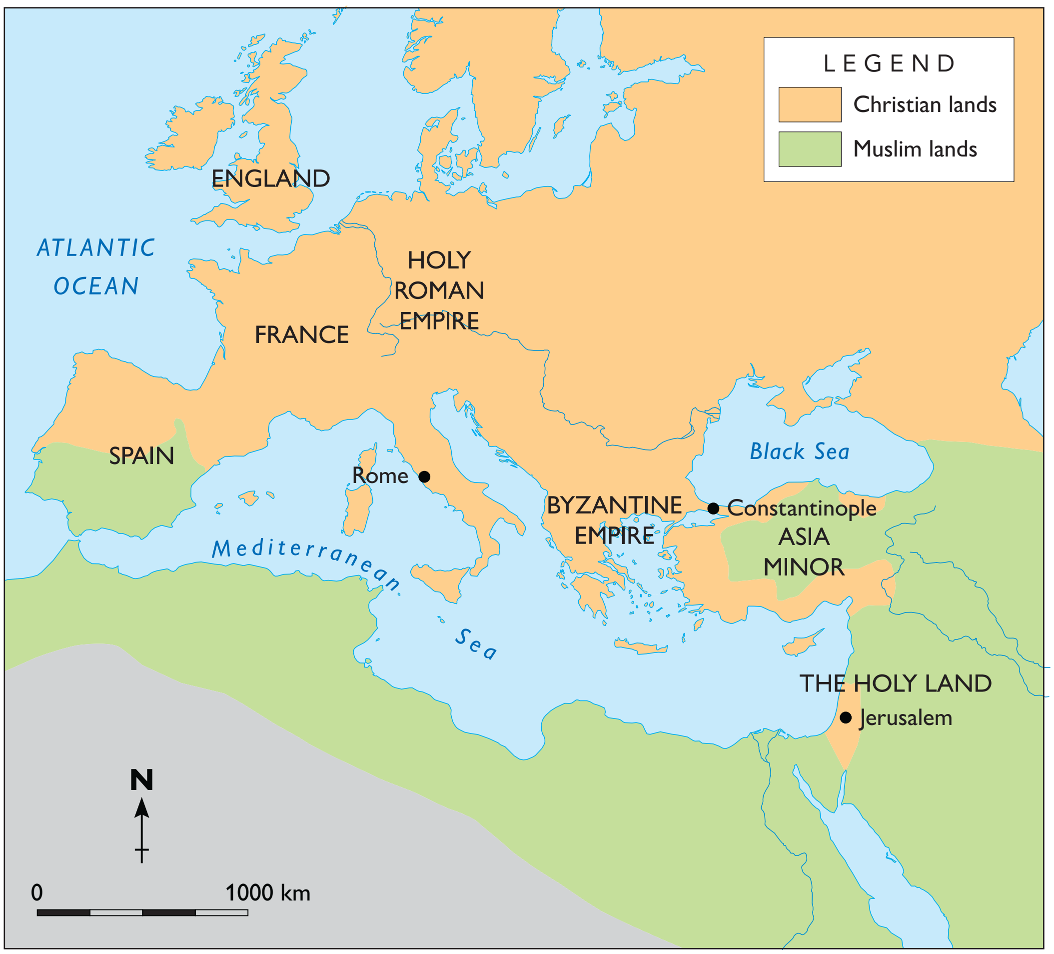
Islam was founded in the early 600s CE in the Middle East by the Prophet Muhammad, who was Allah's messenger on Earth. Muhammad was a religious leader who was visited by Allah. When Muhammad died in 632 CE, the Arabian Peninsula was already an Islamic region. The spiritual leaders who followed Muhammad continued to spread his teachings across a growing Islamic Empire.

The Islamic Empire eventually included most of Asia Minor, northern Africa and Spain. Islamic missionaries and traders spread the Islamic faith further east into India and Indonesia.

Source 7 shows the regions across Europe, Asia Minor and Africa that were Christian or Muslim lands at the start of the eleventh century.

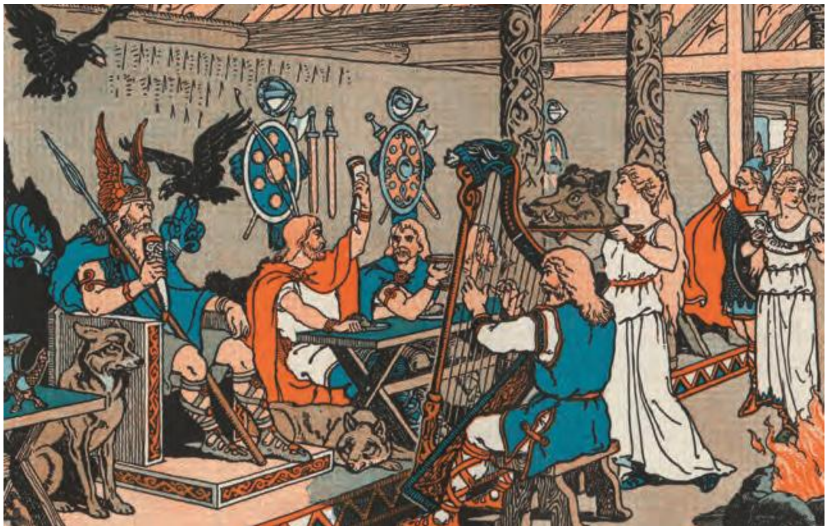
Source 6 The Qur'an is the most sacred text in Islam. It is regarded as the word of Allah as revealed to Muhammad by the angel Gabriel. Its teachings have influenced many key aspects of Muslim societies, including the Ottoman Empire.

THE EUROPEAN AND MEDITERRANEAN WORLD: CHRISTIAN AND MUSLIM LANDS AROUND THE ELEVENTH CENTURY CE



Source 7

Source: Oxford University Press



Source 8 An artist's impression of the chief Viking god, Odin (left), feasting with the spirits of Viking war heroes in *Valhalla*

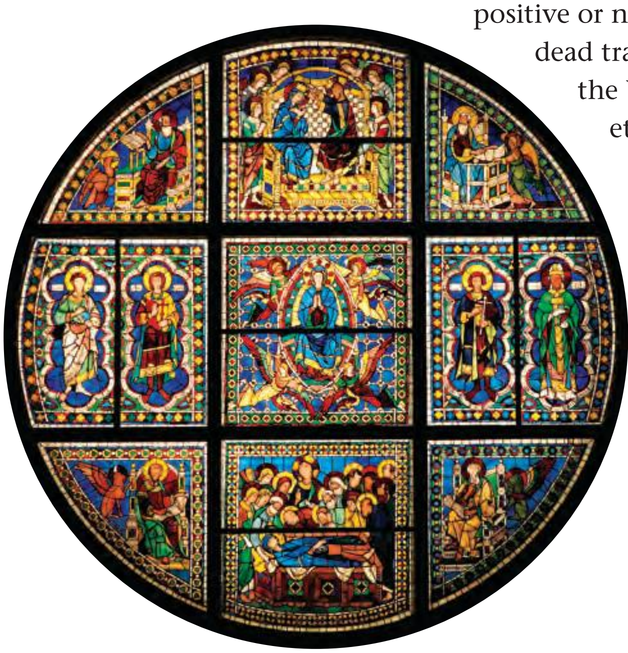
The Vikings

Although the Vikings eventually became Christians, their traditional belief system was very different to Christianity. Instead of worshipping one god, the Vikings originally worshipped numerous gods and goddesses. Many of the Viking gods were responsible for different areas of daily life. There were gods that watched over the successful harvest of crops, and gods that looked after love, health, family and fertility. Other gods were relied on for success in battle and wars. For example, the king of the Viking gods, Odin, was the god of magic, poetry and war.

The traditional stories that Vikings told about gods, giants and monsters are known as Viking mythology (or sometimes Norse mythology). Many of these stories tell of the creation of the world, and were recorded in a collection of stories known as the Viking sagas.

Viking mythology influenced many aspects of Viking life, including the way they viewed death. For example, a warrior did not fear the afterlife, as when Vikings were killed in battle they were believed to go to *Valhalla* – a grand hall in the Viking afterlife where dead heroes feasted at long tables.

Unlike Christians across medieval Europe, the Vikings did not really have a positive or negative view of death and the afterlife. Many believed that the dead travelled to a place called *Helheim*, an underground location in the Viking afterlife. Here their spirits continued to live in a kind of eternal sleep. Important and wealthy Vikings were often cremated (burned) and then buried in longships with items to accompany them into the afterlife, such as horses, clothing and weapons.



Source 9 Christianity was central to the lives of people all across Europe during medieval times. Because very few people at the time could read, important stories and lessons from the Bible were told through stained glass windows in churches and cathedrals.

Medieval Europe

During the medieval period in Western Europe, a branch of Christianity known as Catholicism was the only recognised religion. The Catholic Church, led by the Pope in Rome, played a central role in the lives of all people – from the richest to the poorest. It was not uncommon for people to pray up to five times a day, and everyone attended mass on Sunday to praise God.

Churches, cathedrals, monasteries and nunneries were built across different regions of Europe and played an important role in the community. They provided education, health care, and spiritual guidance and support. Since most people could not read, their understanding of the world was shaped by the teachings of the Church.

Support for the Church was so strong that in 1096 CE, at the request of the Pope, tens of thousands of people from across Europe volunteered to fight in a series of wars known as the **Crusades**. The Crusades were fought between Christians and Muslims to gain control of key religious sites in a region known as the **Holy Land**. These wars went on to influence many aspects of modern European societies.

Crusades
a series of wars fought by Christians and Muslims between 1096 and 1291 CE over control of the Holy Land

Holy Land
territory in the Middle East (now mostly made up of Israel and Palestine) that is important to the Christian, Jewish and Muslim religions

The Ottoman Empire

About 300 years after the end of the Viking age, a group of independent tribal communities joined forces to create an empire. The Ottoman Empire, as it became known, lasted for a period of over 600 years, from the Middle Ages to the start of the twentieth century. The empire began in Anatolia, which is now part of modern-day Turkey.

Across the Ottoman Empire, the religion of Islam had significant influence on the lives of its followers. According to the Qur'an (see Source 6), Muslims across the Ottoman Empire were forbidden from drinking alcohol and were expected to fast (go without food) from dawn to dusk during the holy month of Ramadan. They were also expected to give a portion of their wealth to the poor, and to perform ritual prayers five times a day. It was forbidden to gamble or eat certain foods (such as pork). On holy days, Muslims were expected to gather at the mosque to worship Allah.

Governments, laws and social structures

Governments, laws and social structures were important in societies across the European and Mediterranean world. They helped to create order, define the roles and responsibilities of citizens, and set out systems for reward and punishment. Over time, laws evolved and became more complex. In some societies, these laws were passed on by word of mouth, while in others they were written down. Often the difference between religious beliefs and a government's laws was not clearly defined, and each influenced the other.

Source 10 The Sultan Ahmed Mosque in Istanbul, Turkey, is also known as the Blue Mosque. It was built during the Ottoman Empire. It remains one of the most important religious sites in Turkey today.

hierarchy
a social structure that organises people, with the most important group on top and others ranked beneath in decreasing order of importance

jarls
the nobles of Viking society

karls
in Viking society, the social class of farmers, merchants and craftsmen

thralls
in Viking society, the social class of slaves, prisoners of war and criminals

things
in Viking society, gatherings or assemblies that determined laws

feudalism
a set of legal and military customs that served to organise the society of medieval Europe and Japan

kingdom
a region ruled by a king or queen

knights
warriors in medieval Europe

The Vikings

In the early history of the Vikings, their society was made up of many independent tribal communities, led by a chieftain or king whose role was to protect people. Like many societies across medieval Europe, Viking tribal communities were organised according to a social **hierarchy**. Within each tribal community there were three social classes – ***jarls***, ***karls*** and ***thralls***. In order to rule effectively, the chieftain or king depended on support from the *jarls*. Viking society was ruled over by local assemblies (similar to parliaments) known as ***things***.

Each *thing* met once a year to make new laws or change old laws, resolve disputes, and schedule marriages and divorces. Until the twelfth century, Viking laws were not written down; instead, they were recited by a 'law speaker' at each *thing* so that everyone could hear. Unlike societies in medieval Europe, all Vikings were subject to the law – even the king.

Source 11 An artist's impression of a Viking *thing* being held in Iceland

Medieval Europe

During the medieval period in Europe, society was organised according to a system known as **feudalism**. Feudalism began in Europe around 900 CE and spread across Europe over the next 150 years. Under feudalism, society was organised according to a strict hierarchy. The king was the most important member of society. He owned all of the land in his **kingdom** and was believed to rule with the authority of God.

In order to run his kingdom effectively, a king granted land to the nobles directly below him in the hierarchy, in return for which they provided him with military support and loyalty. The nobles, in turn, provided land to the **knights** below them in exchange for protection. The knights then provided land to the peasants below

Source 12 Peasants were at the bottom of the feudal hierarchy in medieval Europe. This painting from the late fifteenth century shows peasants working the land outside a castle.

them to live on in return for taxes in the form of money or crops. Source 5 on page 266 shows how the system of feudalism worked.

The Catholic Church also had its own land and charged taxes known as tithes to peasant farmers who worked the land. The Church controlled about a third of the land across Europe and had its own courts and laws.

The Ottoman Empire

Ottoman society was complex. At its largest, the Ottoman Empire covered dozens of provinces across Asia, Europe and northern Africa. At the absolute top of the Ottoman political system stood the sultan. The sultan could appoint or dismiss any official at his pleasure. Every law and political decision came from him.

The sultan was both the supreme military commander and the religious leader, responsible only to God. Under the sultan was a complex and strictly defined group of officials and councils who carried out the administration and day-to-day running of the empire.

Within the enormous territory of the Ottoman Empire lived many different groups of people, each with their own customs, beliefs and history – such as Christians and Jews. The empire was Islamic, but promoted religious tolerance. To hold the empire together, the Ottomans developed unique social and political systems. The millet system, for example, enabled non-Muslim communities within the empire to govern themselves, collect taxes, own property and have their own courts to deal with small matters.

Women had fewer rights than men. However, women did exert strong influence over their families, and at various times the women of the sultan's harems had considerable political influence. Slavery was also an important feature of Ottoman society – one in five people in Istanbul were slaves.

Source 13 At the absolute top of the Ottoman political system was the sultan. This portrait shows Mehmed II (also known as Mehmed the Conqueror). He is most famous for capturing Constantinople in 1453, when he was only 21 years old. He renamed the city Istanbul and made it the capital of the Ottoman Empire.

8.3 CHECK YOUR LEARNING

Review and understand

1 **Identify** the title given to the supreme ruler of the Ottoman Empire.
2 **Identify** the name of the most sacred text in Islam.
3 **Identify** the dominant religion across Europe at the start of the eleventh century.
4 **Describe** how Christianity and the Catholic Church influenced the lives of people living in medieval Europe.

Apply and analyse

5 The fall of the Roman Empire changed the European and Mediterranean world forever. **Summarise** the consequences of this event for people living across Europe.
6 **Explain** how Viking societies were organised.
7 **Explain** why stained glass windows were important for most Christians in medieval Europe.

Evaluate and create

8 **Research** how the system of feudalism worked, and create a diagram with labels to illustrate this system.

CHAPTER 9

The Vikings

Norse people (that is, people from the North) came from the region we now know as Denmark, Sweden and Norway. In the late eighth century CE, the Norse people began to voyage by sea from their homelands, commencing an era of raids (surprise attacks) and violence. For the next 200 years – a period known as the Viking Age – they were feared by people across Europe as fierce plunderers. Monasteries and towns were ransacked, and many people were killed or taken prisoner. This behaviour earned Norse people the title *Vikingr*, most probably meaning 'pirate' in early Scandinavian languages.

By around 1000 CE, however, Vikings began settling in many of the places they had formerly raided. Some Viking leaders were given areas of land or money by foreign rulers in exchange for promises to stop the raids. Around this time, most Vikings stopped worshipping Norse gods and became Christians.

Source 1 A replica of a Viking longship in a national park in Norway; longships were used to raid and settle new territories.

9A
How was Viking society organised?

9B
What developments led to Viking expansion?

9C
How did Viking conquests change societies?

9.1 The Vikings: A timeline

Sequence this!
Events in the history of the Vikings

The remains of the monastery at Lindisfarne, in north-east England

1 CE — 700 — 800

787
The first Viking attack on England takes place.

793
Vikings raid St Cuthbert's monastery on the island of Lindisfarne in England.

795
Viking raids begin in Ireland.

799
Viking raids begin in France.

867
Viking raiders (from modern-day Denmark) settle in northern England.

870
The first Viking settlement is set up in Ireland.

878
Alfred the Great (King of Wessex) makes a treaty with Danish Vikings. They are given control of an area of east England in which to settle and trade (known as the *Danelaw*).

Source 1 A timeline of some key events and developments in the history of the Vikings

An artist's impression of Viking raiders arriving in longships on the French coast

A modern statue of the explorer Leif Ericson, in Greenland

The Bayeux Tapestry, a medieval embroidery, shows the events leading up to and including the victory of the Normans over the English at the Battle of Hastings.

900 — 1000 — 1100 CE

911
The King of France makes a treaty with invading Vikings led by Rollo. The Vikings are given a tract of land, which later becomes known as Normandy.

930
The first *Althing* (Viking parliament) is held in Iceland.

***c.* 985**
Erik the Red is banished from Iceland for three years for murder. He sails west and discovers Greenland.

991
In a bid to stop Viking invasions in England, the English King, Ethelred, pays Danish Vikings the first of many tax payments, known as the *Danegeld* (Danes' gold).

***c.* 1001**
Leif Ericson, son of Erik the Red, sails east from Greenland to reach Labrador in North America. A small settlement is set up there, but is abandoned by 1015.

1015
Danish Prince Cnut invades England. He becomes King of England in 1016 (and later of Denmark and Norway).

1066
In England, King Edward dies and Harold Godwinson becomes king. Another contender to the throne, William of Normandy, defeats King Harold at the Battle of Hastings and becomes King of England. He becomes known as William the Conqueror.

9.1 CHECK YOUR LEARNING

Review and understand

1 The monastery on the island of Lindisfarne, off the north-east coast of England, was attacked by Vikings. **Identify** the year this took place.

2 Using your own words, **define** *Danelaw* and state the year it was created.

Apply and analyse

3 Using the timeline, **calculate** the number of years between the first *Danegeld* payment and when the first (Danish) Viking became a king of England.

Evaluate and create

4 Use the internet and other resources to **research** some other well-known Viking raids.

a **Identify** the year they took place and add them to a new timeline in your notebook.

b **Evaluate** the significance of each raid by considering how people's lives changed as a result of the raid. This could be a short-term or long-term change.

9.2 Social classes and roles in Viking society

In this topic, you will:

- examine the three main social classes of Viking society: *jarls*, *karls* and *thralls*
- explore the impact of social roles on everyday life, including the role of women and children.

plundering
stealing, often using violent force

Numerous factors influenced the organisation of Viking society and lifestyle. Like many societies, social classes determined who controlled wealth and power, and who did the hard work. Social roles also determined what people did from day to day. Most men worked as farmers – when they were not away **plundering** – but many were also merchants, shipbuilders, weavers and blacksmiths, to name just a few.

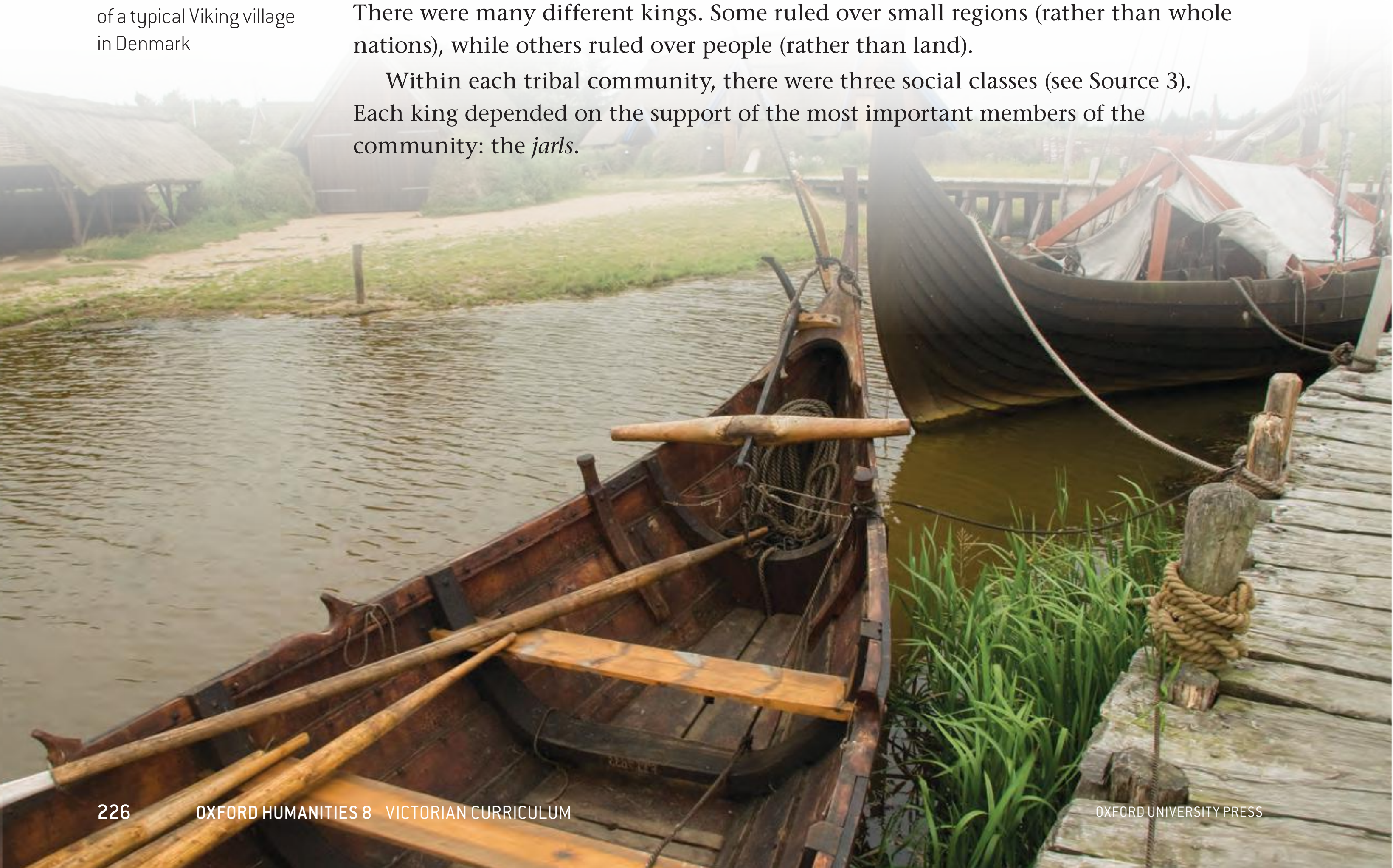
The main role of Viking women was to look after children and manage the home, but some were warriors as well. Little is known, however, about the daily lives of Viking warrior women, and historians are currently debating whether they were common in the Viking armies (see the review activity at the end of this chapter on page 259: 'Did shield-maidens exist?').

Viking society and lifestyle were also influenced by a set of laws, an economic system and a set of beliefs and values.

Social classes

In the early history of the Vikings, society was made up of several independent tribal communities. Often, the title *konungr* (king) was given to the chief of each community. This title did not mean the same thing as 'king' does today, though. There were many different kings. Some ruled over small regions (rather than whole nations), while others ruled over people (rather than land).

Within each tribal community, there were three social classes (see Source 3). Each king depended on the support of the most important members of the community: the *jarls*.



Source 2 A reconstruction of a typical Viking village in Denmark

Source 3 Social classes in Viking society

Social class	Description
Jarls	• They were powerful noblemen (the heads of influential families, which were often joined through marriage). • *Jarls* were wealthy, and generally wore fine clothes and intricate jewellery. • They often lived in large, well-appointed longhouses. • The king depended on their support in order to rule.
Karls	• They were farmers, merchants and craftsmen (such as silversmiths and shipbuilders). • *Karls* were the largest group in Viking communities. • They were 'free' people who were loyal to the king or a jarl and paid taxes to them directly. • Many karls took part in raids.
Thralls	• This class consisted of slaves, prisoners of war and criminals – the poorest of the poor. • *Thralls* performed most of the hard work (e.g. farm labour, cutting wood and stone). • They had no rights under the law, but most were treated well.

Social roles

Despite some clear differences between them, Viking social classes were not as strict as other medieval societies in Europe at the time. It was possible to move between the classes, especially if a person came into a lot of money.

Women and children

A woman's main role was to look after children and manage the home. Common tasks for all but the wealthiest (who might have the help of slaves) included spinning and weaving, collecting firewood and preparing food stores for the winter.

Viking women who were not warriors were left behind when their men went raiding or trading. This meant they had to keep things running on their own – taking on farm chores, tending to and butchering animals, and overseeing slaves, as well as continuing to care for children and the home. As a result, Viking women were very independent. For example, they could choose husbands for themselves, decide to divorce their husbands, and buy land. This was unusual compared with many other societies in Europe at this time.

What little education there was took place in the home, as there were no schools. Daughters helped their mothers in the home, and sons helped their fathers on the farm or in workshops. For boys, it was important to learn to stay fit, ice-skate, wrestle, use swords and ride horses, especially during the Viking Age (from the late eighth to the mid-eleventh centuries CE), when such skills were necessary for taking part in raids.

Source 4 An important role for Viking women was to manage the home. Here, a modern woman in Viking dress prepares vegetables at a Viking festival in the United States.

The *karls*

The largest single group in Viking society was the *karls,* a kind of middle class. These men performed several roles in society – mainly those of farmers, merchants and craftsmen. Many also took part in raids whenever required, often leaving their wives and families to fend for themselves. Some of the different social roles performed by *karls* in Viking society are introduced in Sources 5 to 8.

HRODGEIR THE LUCKY

I'm Hrodgeir the Lucky – a merchant. I've spent my life trading, as my father did. I have sailed many times across what you call the Mediterranean Sea and the Baltic Sea, and down many rivers in Europe. My ships carry out goods to trade, such as jewellery, combs made from deer antlers, decorated swords, furs, and sometimes slaves. The things I bring back include wheat, salt, silver and gold, and spices.

Source 5 A Viking merchant

GUDRUN, HRODGEIR'S WIFE

I'm Gudrun, Hrodgeir's wife. I'm often on my own while Hrodgeir travels and works, as you would expect. When not looking after the children, cooking or chopping wood, I'm spinning and weaving wool. Sometimes Hrodgeir brings me back a piece of silk, and I use it to make my underwear. I also make dresses, aprons, jackets and hats, sometimes decorated with animal fur.

Source 6 A Viking merchant's wife

INGVAR THE OLD

I'm Ingvar the Old, a shipbuilder – I've been a shipbuilder all my life. My sons help me when they are not away plundering. We use iron axes and adzes (another wood-shaping tool) to make keels from single tree trunks. We use freshly cut green wood to make the oak planks of the hull, and curved branches or roots for curved sections. A carved figurehead on the prow (front) and stern (back), often of a dragon, is the finishing touch.

Source 7 A Viking craftsman

OLAF THE TALL

I'm Olaf the Tall. When I'm not raiding foreign lands, I'm a farmer. You can see me here in both of my roles. On the left, I hold my prized sword and shield. I also have an iron-headed axe. I want these weapons buried with me when I die. We Vikings don't wear uniforms when we fight. I have a chain-mail tunic and iron helmet only because I'm wealthy. On the right, you see me in my fields, ready to harvest my crop of rye. I am holding my trusty sickle.

Source 8 A Viking raider/farmer

Interactive
Class and roles in Viking society

9.2 CHECK YOUR LEARNING

Review and understand

1 **Describe** what daily life would have been like for the Viking women and children who did not go raiding with the men.

2 **Identify** which social class captured prisoners of war might belong to. Why do you think this is?

Apply and analyse

3 **Explain** why Viking women were typically very independent.

4 Draw a labelled diagram to **summarise** how Viking society was organised.

Evaluate and create

5 Use the internet to **research** typical clothing worn by Viking men or women. Design a 'very best' outfit for either a Viking man or woman.

6 Select any three characters profiled on these pages. With two classmates, **create** a short dialogue they might have upon meeting in the marketplace. Your dialogue should reflect their different social classes and roles. Your teacher may ask you to perform it for the class.

9.3 Viking home life and work

In this topic, you will:

- examine the types of homes Vikings lived in, including longhouses, and their location
- explore the importance of farming and craft to Viking society.

Viking villages were often located in rural areas near water – on a coastline or beside a river – making it easier to load and unload ships. Among the cluster of **longhouses** were barns to house animals and smoke fish, workshops of village craftsmen, perhaps a sauna, and an open area where markets were held.

longhouses
Viking houses, characterised by their long shape, often built into mounds of earth; they sheltered the extended family and their animals

Homes

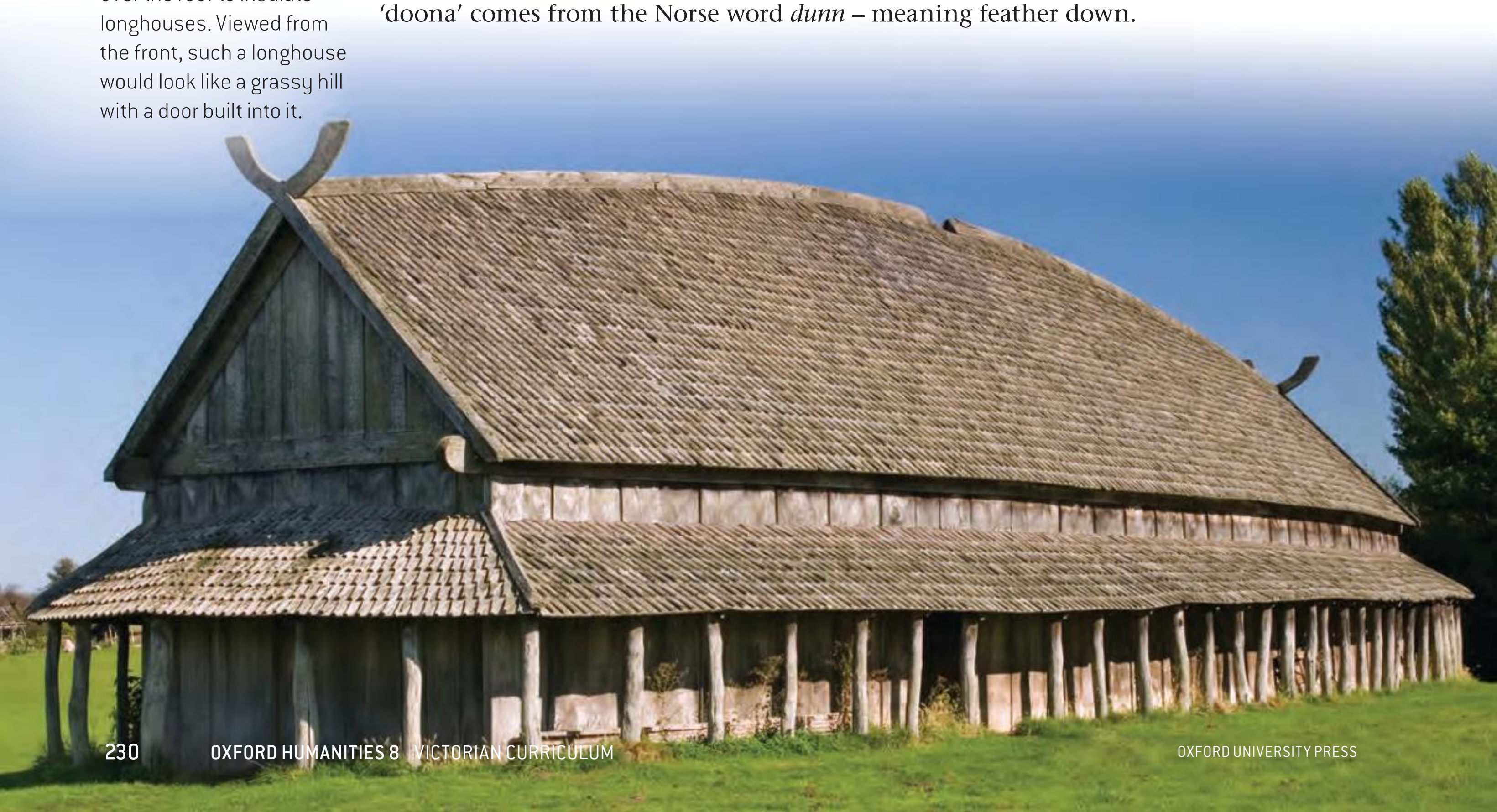
The biggest longhouse belonged to the king or most important *jarl*. *Karls* tended to live in smaller longhouses of two or three buildings, which were not as grand. Less is known about where the *thralls* lived, but as slaves they might have lived on their owners' property. However, they did have the right to own their own property if they were able to pay for it.

Longhouses were rectangular buildings with rounded ends and thatched roofs. They were generally 15–25 metres long and 5 metres wide. There was a dirt floor and no windows. There was a small hole in the roof to let some smoke out from a fireplace, located directly under it. The fireplace provided warmth, light and a means to cook, but also made the longhouse very smoky.

Longhouses were dark, smelly places. Odours of smoke, sweat, sour milk and cooking mingled together and lingered. There was also often a stink of animal manure from the animal pens. Toilets were holes in the ground outside.

The longhouses of most Vikings did not contain much furniture. Often there was only a roughly made table and some benches. Low platforms, built along the sides, doubled as beds and places to sit. These benches were typically covered in animal skins, furs or cloth bags filled with down (duck or goose feathers). In fact, the word 'doona' comes from the Norse word *dunn* – meaning feather down.

Source 9 Longhouses like this one – which was built around 980 CE – were home to the Vikings. Sometimes earth was piled along the walls and over the roof to insulate longhouses. Viewed from the front, such a longhouse would look like a grassy hill with a door built into it.



Source 10 The interior of a reconstructed longhouse

Food and diet

The foods Vikings ate were very simple and reflected their traditions of fishing and farming. Meat (from the cattle, sheep, pigs and hens they kept) and fish formed the basis of most meals. Meat and fish were smoked, dried and salted during the summer months and kept in storage, so that there was enough to last through the long winter months. The Vikings also harvested grains (such as wheat, barley and rye) to make into bread, and vegetables (such as onions, leeks, peas and cabbage) for use in stews. They also collected fruits and berries from nearby forests and hunted wild boar, seabirds, hare and elk for meat.

Source 11 An example of the typical, simple Viking diet

Work

The Vikings were not only fierce warriors, but also accomplished farmers and craftspeople. For most Vikings, farming was their main occupation. The whole family would take part in the various seasonal jobs involved in running the farm. Crops would be grown during the summer, harvested in autumn and stored for the long winter.

Quiz me!
A quick quiz on Viking home life and work

Viking crafts

Viking craftspeople were essential to everyday life. The less skilled metalworkers produced farming tools, while the most skilled would specialise in making the finest weapons, such as swords.

As well as making weapons for battle, metalworkers also made armour, such as the helmet shown in Source 12. Helmets like these were worn by Viking warrior chieftains or wealthy *jarls*. Poorer fighters wore leather caps, or hats lined with fur. Wealthy Viking warriors also wore chain-mail tunics, while poorer warriors wore leather vests or padded jackets.

Viking craftspeople also made fine jewellery and other luxury items. Jewellery was another way in which Vikings demonstrated their social standing and wealth. Gold and silver jewellery was worn by those with the most wealth and power in the village. Those of less importance wore bronze or pewter jewellery. Sometimes the silver coins and candlesticks seized on raids were melted down to make jewellery, such as the silver bracelet shown in Source 12. The distinctive Viking style is shown here – with plaited strands ending in animal-like creatures. Jewellery tended to be highly decorative and used symbols taken from Viking mythology and religion.

Source 12 Viking metal workers were skilled craftsmen, able to produce items ranging from farming tools and weapons through to the finest decorative jewellery. This helmet and bracelet show the detail and skill obvious in many Viking **artefacts**.

artefacts
objects, small or large, that have been made or changed by people

I used to think, now I think

Reflect on your learning about Vikings as skilled craftspeople, and complete the following sentences.

- I used to think …
- Now I think …

What has changed in your understanding?

9.3 CHECK YOUR LEARNING

Review and understand

1 Why were Viking villages often located near coastlines or rivers?

2 **Describe** the inside of the typical Viking longhouse.

Apply and analyse

3 **Explain** the connection between the doona on your bed and a Viking longhouse.

4 **Explain** how social classes might have been obvious from the helmets that Vikings wore.

5 Think about some of the silver bracelets made today. **Compare** the metal bracelet shown in Source 12 with modern jewellery in terms of its design and craftsmanship. What are some similarities and differences?

Evaluate and create

6 **Create** a labelled sketch showing a modification (or improvement) you would make to the longhouse shown in Source 10 to make its interior more suitable for a very wealthy *jarl*.

9.4 Viking laws and economy

In this topic, you will:

- examine the laws of Viking society and how they influenced Viking behaviour
- describe evidence of Viking trade between Russia, Ukraine and parts of Asia.

When people today think of Vikings, many of them imagine hordes of lawless warriors. However, the Vikings had a system of strict laws that guided behaviour in their communities. They also traded with many other societies.

Laws

In the early history of the Vikings, different areas were ruled by tribal communities. Each community had what was known as a ***thing***, which acted like a parliament and court in one. *Things* were held once a year in every Viking community. Their main purpose was to make and change laws, and to judge when they had been broken. Only those people who owned land could attend and speak.

Until the twelfth century, Viking laws were not written down. Instead, they were preserved in the memory of a 'law speaker'. It was his job to remember all laws and recite them loudly at each *thing*.

thing
in Viking society, a gathering or assembly that determined laws

Activities carried out at *things*

- Existing laws were recited by the law speaker so that all could hear
- New laws were made (or old laws changed) after discussion and general agreement
- Disputes were resolved, sometimes even by conducting fights to the death
- Rulings were made on whether or not a law had been broken
- Social proceedings, such as marriages and divorces, were carried out

Source 13 Some typical activities conducted at *things*

The Vikings respected their laws. This is partly because individuals valued their own honour and reputation, but also because some punishments were very harsh. For example, if an individual was found guilty of breaking a law at a *thing*, the punishment could be death. Another harsh punishment was to be made a full outlaw. This meant being banished (sent away) for life, with a large bounty (reward) on one's head.

Quiz me!
A quick quiz on Viking laws

KEY CONCEPT
Continuity & change

The *Althing*

Iceland was the only Viking society to have a national *thing*, known as the *Althing*. It was the first parliament in the world. The *Althing* met for the first time on the Plains of Thingvellir in 930 CE; and, like other *things*, it was held once a year. People from different communities travelled long distances to get there, setting up temporary camps. The most important part of the *Althing* was the *Lögberg* ('law rock'), where the law speaker stood to proclaim the laws.

Today, the *Lögberg* is a grassy mound, changed over time by natural forces.

Since that first meeting, there have been changes to the *Althing*, and it was even abandoned for a time. But today, the *Althing* is the name of Iceland's parliament. Icelanders continue to gather at the *Lögberg* on 17 June each year to commemorate the *Althing* decision (in 1944) to create the Republic of Iceland.

For more information on this key concept, refer to page 200 of 'The history toolkit'.

Source 14 The Icelandic flag flying near the site of the *Lögberg*, where the first *Althing* was held in 930 CE

Economy

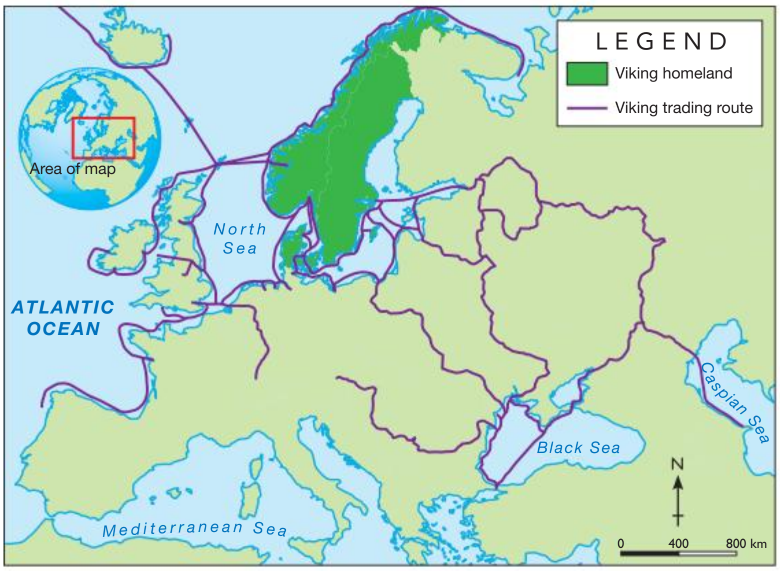
In early times, the Viking economy was based mainly on farming. However, as Viking societies grew larger, good farming land became difficult to find. Much of the landscape of Scandinavia is mountainous or thickly forested, and winters can be harsh. This made clearing and preparing the land for farming impossible in many places. Trade helped to meet the needs of the growing population.

Trade

Silk Road
a network of trade routes stretching west from China to the Mediterranean Sea; it was the main means by which silk was introduced to the West

Viking merchants traded in ships across seas and down rivers. Stashes of foreign coins found in Sweden are evidence that the Vikings were trading in parts of modern-day Russia, Ukraine and central Asia. Viking tools and artefacts, such as an amulet decorated with Thor's hammer, have also been found at former trading sites in Russia. The Vikings reached as far east as Constantinople and Jerusalem, in order to meet with traders who had travelled the **Silk Road**.

MAJOR VIKING TRADE ROUTES



Source 15

Source: Oxford University Press

Items the Vikings carried for trade included timber, leather shoes and bags, smoked fish, fur, jewellery and slaves. These were exchanged for goods such as wheat, iron, silverware, wine, spices, silks, salt, weapons and glassware.

At first, trade was conducted through a process of **bartering**. Later, goods were bought and sold with coins. Many towns the Vikings later colonised – such as York (England), Kiev (Ukraine) and Dublin (Ireland) – became busy centres of trade.

bartering
the exchanging of goods or services between people (typical of trade before the use of money), where both parties agreed that what was exchanged was of roughly equal value

9.4 CHECK YOUR LEARNING

Review and understand

1. **Define** the term *thing* in the context of Viking society. Give two examples of how *things* influenced the lives of Vikings.
2. **Identify** three goods that Viking traders exported and three goods they imported.
3. **Describe** the evidence that suggests Vikings traded with Russia.

Apply and analyse

4. **Examine** Source 15 and the world map in the back of this book to identify five modern-day countries that Vikings traded with.

Evaluate and create

5. In a paragraph, **discuss** why the *Althing* is an example of continuity and change in the history of Iceland.

9.5 Viking beliefs and mythology

In this topic, you will:

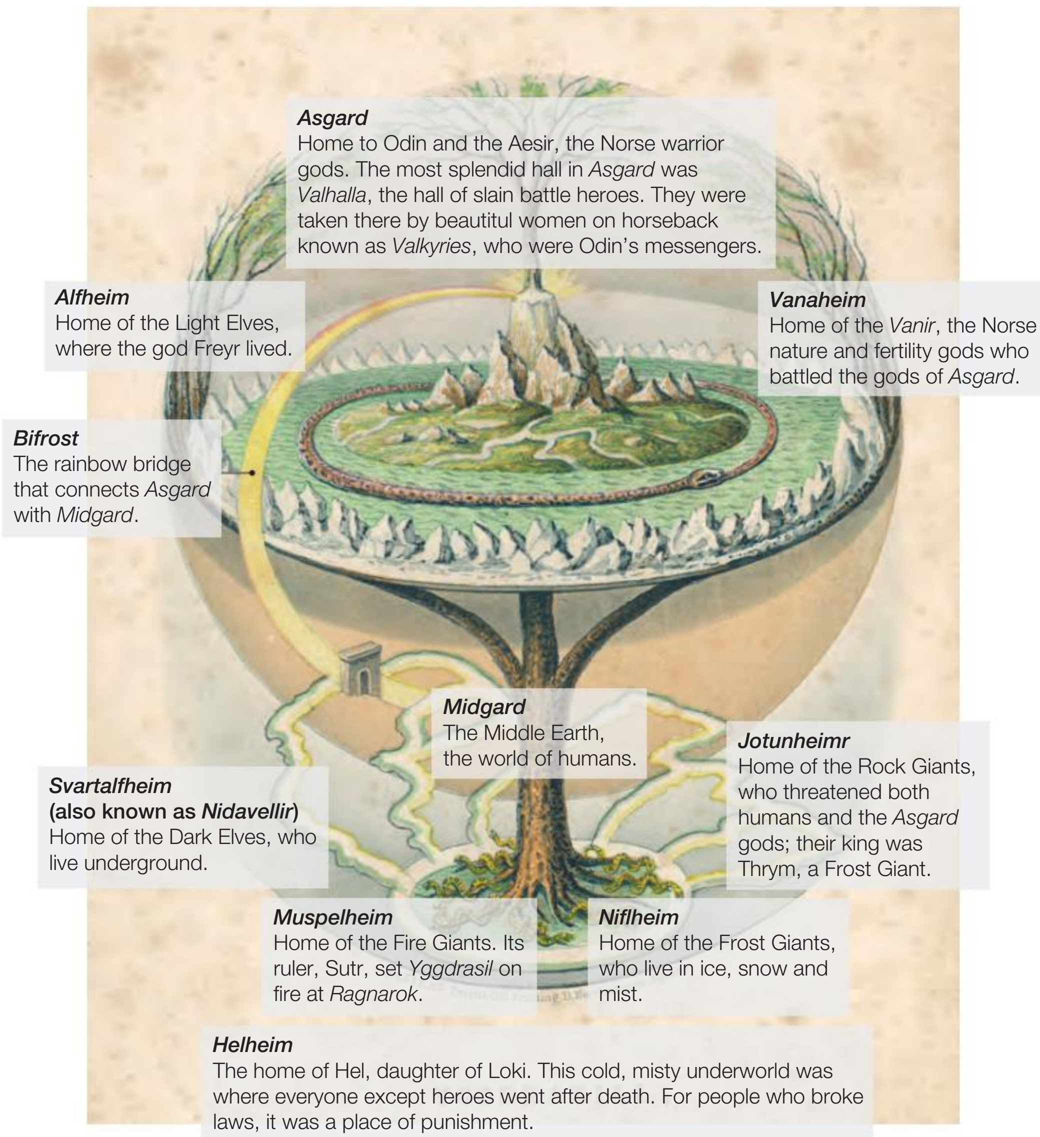
- explore Viking mythology and Viking beliefs of the afterlife
- understand the role of gods such as Odin, Thor and Frigga in Viking religion.

Compared with many other civilisations, we know very little about the traditional beliefs and religious practices of Vikings. We do know that they had their own religion, and worshipped many different gods early in their history, but these old beliefs died out once they started to convert to Christianity.

Viking mythology

The traditional stories Vikings told about gods, giants and monsters are known as Viking mythology. Many of these stories tell of the creation of the world, and were recorded in a collection of stories known as the Viking **sagas**. In traditional Viking mythology, there were 'nine worlds'. Each was connected to the other by the branches of the 'world tree' known as *Yggdrasil* (see Source 16).

sagas
long stories (sometimes mixed with poetry) about heroes who achieved great things and fought noble battles; often a mix of real events, legends and myths



Interactive
Viking mythology

Source 16 The 'nine worlds' of Viking mythology were connected by *Yggdrasil*, a 'world tree'.

Source 17 In Viking mythology, a rainbow bridge known as the *Bifrost* connected *Asgard* with *Midgard*.

When people died, their bodies were cremated (burned) and the remains were buried along with a few items that were important to them during their life. It was believed that they could take these items into the next world. Some Viking chieftains were given ship burials, where they were buried in a grave with their ship, along with treasure and weapons. Often, their favourite dogs and horses were killed and buried with them. Sometimes, chieftains were even buried with human sacrifices.

Like the ancient Greeks, the Vikings did not have either a positive or a negative view of the afterlife. Many believed that the dead travelled to a place called *Helheim*, which lay underground. *Helheim* was ruled by the goddess Hel – half beautiful woman and half rotting corpse. Hel is the origin of the modern word 'hell'. *Helheim* was thought of as a cold and damp place where the spirits of the dead continued to live in a dreamlike form – a kind of eternal sleep.

Vikings who were killed in battle were believed to travel to *Asgard* after they died. A beautiful hall there, known as *Valhalla* ('Hall of the Slain'), was where warriors would spend the afterlife feasting.

Viking gods

According to Viking beliefs, gods were responsible for different areas of daily life. There were gods that watched over harvests, love, family and fertility. Others watched over success in battle and wars.

Source 18 According to Viking mythology, thunder was the sound of Thor's chariot rumbling across the sky, pulled by two goats. Lightning was the path his hammer took when he tossed it. His belt gave him the strength of 10 men. Many of us know Thor as portrayed by Chris Hemsworth in the Marvel Cinematic Universe.

Source 19 Some important Viking gods

Odin	*King of the gods in Viking mythology*	Odin (also known as Wodin) was the god of magic, poetry and war.
Freya	*Goddess of beauty and love*	Freya rode a chariot drawn by two cats.
Loki	*A shape-changing trickster god*	Loki was both friend and foe of the gods. He was the father of Hel, as well as the monsters Jormungand and Fenris.
Freyr	*God of fertility, peace and harvests*	Freyr was the twin brother of Freya.
Frigga	*Goddess of women and the home*	Frigga (also known as Frigg) was the wife of Odin.
Thor	*God of storms and thunder*	Thor rode a chariot across the skies, creating the sound of thunder. He also caused lightning with his magic hammer.

Source 20 In Viking mythology, Odin watched over the universe while travelling on an eight-legged horse, called Sleipnir. He was protected by two wolves, Geri and Freki. His two ravens, Huginn and Muninn, flew all over the world to bring him information. His name gave us the word 'Wednesday'.

Days of the week

KEY CONCEPT
Continuity & change

In English, many of the names of the days of the week have their roots in Norse and Old English culture (see Source 21). (Old English, also known as Anglo-Saxon, is the earliest recorded form of English.) Tuesday, for example, is named after the Norse god of war, Tiwes. His day was *Tiwesdæg*, which became Tuesday. Similarly, Wednesday was named after Odin (or Wodin). His day was *Wodnesdæg*, which became Wednesday. Thursday was named after the god Thor, and Friday was named after Frigga (Odin's wife).

Source 21 English and Norse words for the days of the week

English	Norse	Meaning
Sunday	*Sunnandæg*	Sun's day
Monday	*Monandæg*	Moon's day
Tuesday	*Tiwesdæg*	Tiwes' day
Wednesday	*Wodnesdæg*	Wodin's day
Thursday	*Đunresdæg*	Thor's day
Friday	*Frigedæg*	Frigga's day
Saturday	*Sæterdæg*	Saturn's day

For more information on this key concept, refer to page 200 of 'The history toolkit'.

9.5 CHECK YOUR LEARNING

Review and understand

1 **Identify** how many worlds there were in traditional Viking mythology, and how they were believed to be connected.

2 **Outline** what happened to warriors after they died, according to Viking beliefs.

3 **List** three points that interest you about Odin and three points that interest you about Thor.

Apply and analyse

4 **Suggest** why Viking people might have been reassured by the sound of thunder.

5 In pairs, read the key concept box 'Days of the week'. **Explain** how the days of the week demonstrate the concept of continuity and change.

6 **Compare** Viking myths with any other creation stories or beliefs that you have studied. Can you identify any similarities or differences between Viking myths and other creation stories you know or have studied?

Evaluate and create

7 Many of us know about Viking mythology, including the figures of Odin, Thor and Loki, from the popular Marvel films. While the events of these films are fictional, they help keep the stories of Viking mythology alive today. As a class, **discuss** the concept of significance (see page 201 of 'The history toolkit') and what the *Thor* movies tell us about the significance of Viking mythology.

9A RICH TASK

Quizlet
Revise the key terms you have learnt so far.

Brutal barbarians … or not?

When most people hear the word 'Vikings', they immediately imagine hordes of bloodied warriors terrorising innocent villagers and plundering monasteries. Although this was true, there was also another side to the Vikings. In addition to being 'brutal barbarians', they were also skilled craftspeople, poets, wood and ivory carvers, weavers and musicians.

As with any historical inquiry, the truth of who the Vikings were lies hidden among a range of different primary sources.

Source 22

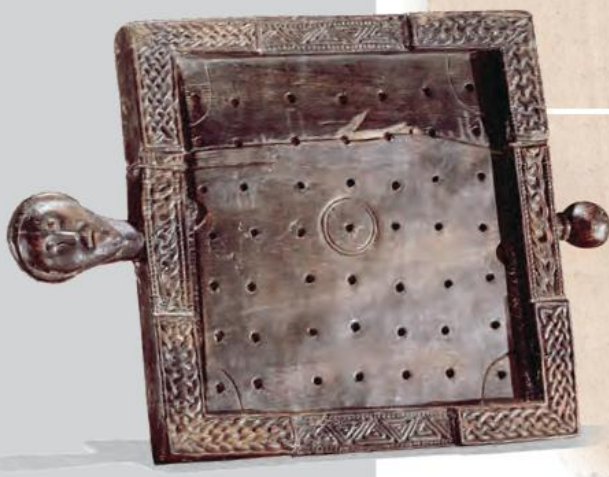
Winter he would spend at home on Gairsay, where he entertained some 80 men at his own expense … In the spring he had … a great deal of seed to sow … Then when that job was done he would go off plundering in the Hebrides [islands off the west coast of Scotland] and in Ireland … then back home just after mid summer, where he stayed until the cornfields had been reaped [harvested] and the grain was safely in. After that he would go off raiding again, and never came back till the first month of winter was ended.

A translated extract from the *Orkneyinga Saga*, an Icelandic saga written in the 1100s; it provides a perspective on a Viking named Svein Asleifarson, who lived on one of the Orkney Islands (off the north coast of Scotland).

Source 23

[The Vikings] came to the church of Lindisfarne [an island off the north-east coast of England], laid everything to waste with grievous plundering, trampled the holy places with polluted steps, dug up the altars and seized all the treasures of the holy church. They killed some of the brothers [monks], took some away with them in chains, many they drove out naked and loaded with insults, some they drowned in the sea…

A translated extract from *Historia Regum*, written by an English monk, Simeon of Durham, in the twelfth century



Source 24 A wooden game board thought to have been used by the Vikings to play a strategic game similar to chess, known as *hnefatafl*

Source 25 An exact copy of a carefully carved metal container made by a Viking craftsman; the heads of birds and animals decorate the lid.

KEY SKILL
Analysing sources

Analysing primary sources

The primary sources that historians use to understand the Viking way of life tell different stories. It is the job of historians to examine these sources and come to a conclusion about their usefulness and reliability. It is important to identify who created each source and the reason why it was created. That way you can identify any potential bias.

Historians use questions to help guide their investigations. Questions you might ask yourself include:

- What did the person creating the source want their audience to think?
- Why might they have wanted people to think this?

The table in Source 26 contains a number of questions that you can ask yourself when analysing any primary source. Although some of them are worded specifically about the Vikings, you can modify them to help you when studying any period of history.

For more information on this key skill, refer to page 213 of 'The history toolkit'.

Practise the skill

1 **Examine** Sources 22 to 25 carefully, and complete a copy of the table in Source 26 in your notebook.

2 Once you have completed the table, use the information you have gathered to write a short paragraph to discuss the topic 'The Vikings: Brutal barbarians or cultured artists?'

Source 26

Questions to guide your source analysis	Source 22	Source 23	Source 24	Source 25
Who wrote or created the source?				
How might the source's creator be biased?				
Why was the source created?				
Was the source intended to be used by non-Vikings? Why or why not?				
What does the source suggest about the Vikings?				
What evidence does the source provide that the Vikings were brutal barbarians?				
What evidence does the source provide that the Vikings were civilised and cultured people?				
Do you think the source is true and reliable? Why or why not?				

Extend your understanding

Imagine you are a writer and poet living in England during a period of Viking raids. You have been asked by one of the king's officials to write a book about the Vikings. You will be paid generously for your work. The king has ordered that your book should be designed to convince your fellow citizens that the Vikings are brutal barbarians. In order to do this, it will be an advantage to present a biased (or one-sided) view of the Vikings.

1 Of the four primary sources, Sources 22 to 25, **determine** which two you would choose to put in your book. Why?

2 Write the caption (description) that you would put underneath each source to explain what it shows. Remember, your aim is to make your readers believe that all Vikings are brutal barbarians.

3 Now that you have some experience of presenting a biased point of view, **identify** at least two hints or clues you should look for in primary sources to identify bias.

4 Is the fact that you were paid money to write your book proof that your point of view is biased? **Explain** why or why not.

9.6 Viking raids

In this topic, you will:

- examine reasons for Viking raids, including survival, local knowledge, the desire for honour and wealth, and revenge.

Key skill worksheet
Analysing cause & effect: Viking raids

Viking society changed significantly in the late eighth century CE. Up until this time, the Vikings were known as honest traders outside their homelands. After this time, however, the Vikings became feared, as they pushed outwards from their homelands to expand their territory. For the next 200 years, they terrorised villages, towns and monasteries in the surrounding lands with a series of brutal raids.

Raids were often planned and timed to take victims by surprise. Many were launched just before dawn, as unsuspecting villagers slept. The raids were carried out quickly – hence the description 'lightning raids'. Part of the terror for victims was that Viking communities also continued to trade normally during this time. If Viking longships were spotted off the coast, those on shore often could not tell whether the Vikings were coming to trade peacefully or to attack.

Possible reasons for Viking raids

Historians still argue today about what motivated the Vikings to change from honest traders into violent raiders. Several reasons have been put forward to explain this.

Survival

Resorting to raids may have been necessary for the survival of some Viking communities living in a harsh land with an unforgiving climate. There was only limited coastal farming land in the Viking homeland (see Source 1). As the population grew, the pressure on such land would have increased. Also, in Scandinavia winter is long and can be severe, especially in areas further north. Summer brings long hours of daylight but is quite short, so the growing season for crops is short too.

Source 1 A common landscape in many parts of Scandinavia – note the relatively small area of coastal flatland suitable for farming.

Local knowledge

The knowledge the Vikings had built up through years of trade with neighbouring countries is another possible explanation for the beginning of their raids. A combination of local experience and reports passed on by Viking merchants helped them piece together an accurate picture of the surrounding regions – especially the riches that were held in the towns and monasteries there. By the eighth century CE, their shipbuilding abilities and navigational skills were highly advanced, making such raids a viable alternative to trade. Some scholars have suggested that the Vikings were also taking advantage of what they saw as weak and divided rule in surrounding regions at the time.

Source 2
Medieval churches and monasteries were attractive targets for plundering Vikings, containing treasures such as the Lindisfarne Gospels, an eighth-century manuscript bound in silver and jewels. The original jewelled cover was lost during the Viking raid on the Lindisfarne monastery in 793 CE. This replacement was made in 1852.

Desire for honour and wealth

Some contend that the desire for honour, glory and adventure was a reason for the Viking raids. For example, a man's reputation was very important to a Viking. To lose honour or respect was a disgrace. Raids may have been a way for some dishonoured Vikings to redeem themselves, returning as warriors who had fought bravely. Viking warriors also believed that they would go straight to *Valhalla* if they died fighting bravely in battle.

Historians also argue that the change in Viking behaviour was linked to the desire for quick and easy wealth. Important Vikings, such as kings or influential *jarls*, could use the stolen riches to reward their men and build their support base in the community. This would then strengthen their influence and power at home.

Revenge

Another possible reason why Vikings may have started to carry out raids on nearby lands was a desire for revenge. Charlemagne (*c*. 742–814 CE), King of the Franks and later the Holy Roman Emperor, fought for about 40 years to bring most of Western and Central Europe under his control. As part of his military efforts, he ordered those he regarded as **pagans** (including many Vikings) to become Christians. Any who refused were killed. Early Viking raids on Europe took place during the later years of Charlemagne's reign, and the raiders may have been motivated by a desire to take revenge on Christians, as well as by greed.

pagans
a term sometimes used by people of Christian, Muslim and Jewish faiths to describe people who do not share their beliefs

9.6 CHECK YOUR LEARNING

Review and understand

1 **Identify** a major change that happened in Viking society in the late eighth century CE.

2 **Describe** some of the tales merchants told of churches and monasteries that may have tempted some Viking tribal rulers to raid such places.

3 **Outline** two ways wealth gained from raids would benefit Viking rulers.

Apply and analyse

4 **Explain** the significance of honour to Viking warriors. Why was it important to them?

5 Imagine you are a Viking farmer who works the land in the coastal region shown in Source 1. The population of your village is growing. Why might you be tempted to leave your homeland?

Evaluate and create

6 **Create** a concept map that explains how and why you think societies that encountered the Vikings might have changed. Compare your finished concept map with that of a partner.

7 **Discuss** why some historians take the view that early Viking raids on Europe were revenge missions. What evidence would you look for to help confirm this view?

9.7 Viking skills and achievements

In this topic, you will:

- investigate the design and construction of longships and their role in Viking exploration
- describe Viking craftsmanship of weapons and armour, including swords and helmets.

The Vikings were highly skilled craftspeople. They built seagoing ships and made their own weapons and armour. These skills increased their success in trade and, later, in the search for and conquest of new lands.

Shipbuilding

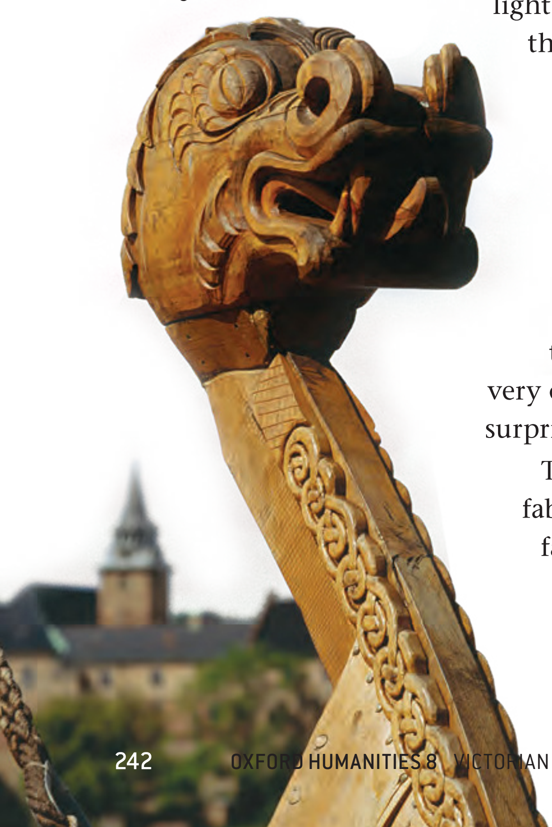
The Vikings were expert shipbuilders, with easy access to the timber of Scandinavia's forests. They built trade ships, ferries, rowing boats, fishing vessels and **longships**.

By the end of the eighth century CE, Vikings had been sailing as merchants for some time. They were skilled at navigating – using the sun and stars, weather patterns, bird-flight trails and coastal features as guides. In other words, they were well placed to be either sea traders or sea pirates. Their strong navigational and shipbuilding skills gave them all the expertise they needed to make and sail efficient warships. These included the longships they used for lightning raids. The Vikings called them *drakkar*, meaning 'dragons'.

longships
types of ships used by the Vikings to transport warriors on attack-and-raid missions; longships had shallow hulls, making them speedy and easy to manoeuvre, and they were often decorated with mythical creatures

Source 3 A Norwegian shipbuilder carving a post for the stern (back) of a longship, using the same methods as his Viking ancestors, more than a thousand years ago

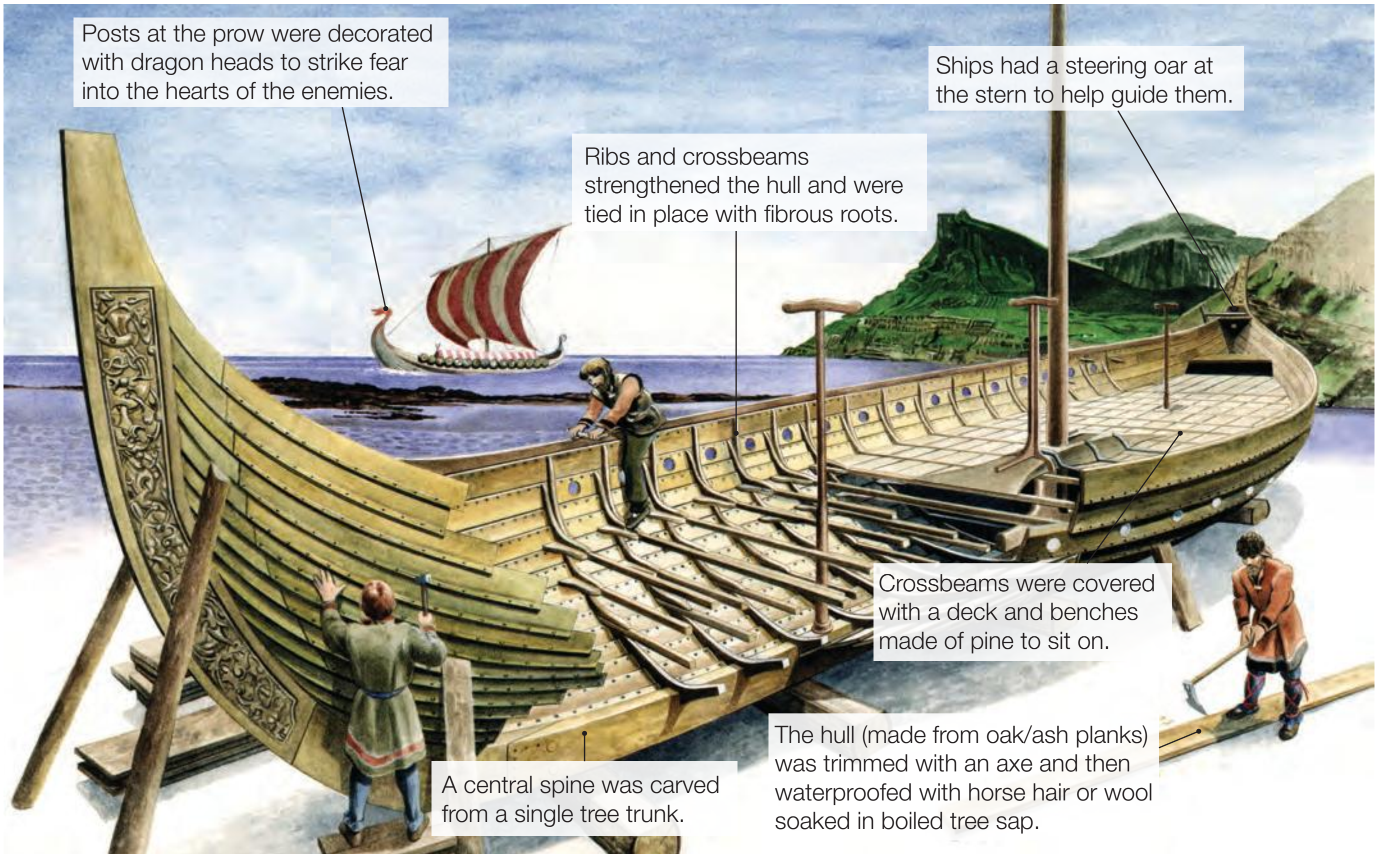
Source 4 A dragon head on the prow (front) of a replica Viking longship in Norway



Longships

Longships were up to twice as long as trade ships (up to about 37 metres in length). They also had a thinner, lighter hull, and could carry 100 warriors (68 of whom were oarsmen – 34 on each side). Being so light, longships were easily carried overland when necessary. They were wide and shallow, helping them to stay upright in rough seas and meaning they could be taken into shallow water. Because longships could be sailed very close to shore, Viking raiders were able to wade in very quickly for a surprise attack.

The huge square sail of a longship (made from pieces of woollen or linen fabric, stitched together) was commonly dyed blood red and coated in animal fat to make it more water-resistant. In strong winds, the sail provided for a fast sea or ocean crossing. Longships were also equipped with oars. If there was no wind, then the sail could be lowered and the men could row the longship instead. Rowing was also necessary to navigate rivers.



Source 5 An artist's impression of Viking shipbuilders constructing a longship

The blood-red sail, together with a dragon head at the prow and dragon tail at the stern, helped to heighten the terror for raid victims. Vikings also believed that the dragons would frighten away any evil spirits or monsters during sea crossings.

Weapons and armour

Weapons were very important to the Vikings. For a start, they were essential for hunting animals for food. They were also traditional symbols of wealth and power. For example, the swords of rich men and warriors often featured hilts (handles) decorated with silver, copper or bronze (see Source 7). Swords were the most valued weapons. The Viking sagas tell of some weapons (particularly swords) being so highly valued by their owners that they were given 'pet' names (see Source 6). A warrior's sword was usually buried with them when they died.

Source 6 A selection of 'pet' names used to describe weapons, recorded in the Viking sagas

Weapon	'Pet' name	Translation
Sword	*Fótbítr*	Foot biter
	Gunnlogi	Battle flame
	Leggbítr	Leg biter
	Saetarspillar	Peace breaker
Axe	*Himintelgja*	Heaven scraper
	Rimmugýgr	Battle hag
Coat of chain mail	*Full-trúi*	Old faithful

Source 7 Two Viking swords and a spearhead

Source 8
Reproductions of authentic Viking armour, including helmets, on show at a battle re-enactment in Iceland

By the start of the Viking Age, the Vikings were highly skilled metalworkers. As a result, Viking warriors were heavily armed. As time passed and raids became more a part of Viking culture and tradition, weapon makers were kept busy forging arrows, spears and axe heads from iron. They also became skilled at sharpening the steel edges of swords until they were razor sharp.

Wealthy Vikings could afford metal armour, including helmets with nose bridges, and chain mail (see Source 8). By the time William the Conqueror (whose ancestors were Vikings) fought in the Battle of Hastings in 1066 (see Source 10), chain mail was worn by the majority of soldiers.

Most other Vikings fought with a shield and either a spear or an axe. Spears were up to a few metres long, and were made from wood with an iron spearhead at the end. Axes had thick, rounded blades, which were strong enough to cut through armour. They were light to use and extremely effective. Shields were generally made of wood and reinforced with either leather or iron. They were the main form of defence for Viking warriors.

KEY CONCEPT
Evidence

Horned helmets

Many people today think that the helmets of Viking warriors had large horns on either side – mainly because Vikings are often shown this way in popular culture. In the nineteenth century, costume designers working on operas such as Wagner's *The Ring Cycle* often dressed Viking characters in horned helmets. Movies, comics, books, games and even the mascots of popular sporting teams continue to perpetuate this image, even though there is no evidence to support it at all. Think about it – horns on helmets would have made them easier to grab or knock off, leaving Viking warriors defenceless against blows to the head from swords or axes!

For more information on this key concept, refer to page 201 of 'The history toolkit'.

Source 9 Vikings are often shown in popular culture wearing horned helmets – like these characters from the 2010 animated film *How to Train Your Dragon* – even though this is historically incorrect.

Source 10 A scene from the Bayeux Tapestry shows the army of William, Duke of Normandy, crossing the English Channel to attack England. William was a descendant of Vikings who left their homeland to settle in northern France.

9.7 CHECK YOUR LEARNING

Review and understand

1 **Describe** how some Vikings displayed their wealth and social position through their weapons and armour.

2 **Identify** the Norse word used by Vikings to describe their longships. What is the meaning of this word in English?

3 **Describe** two innovations of Viking shipbuilding that made their longships better suited to long sea voyages and raiding.

Apply and analyse

4 **Explain** why the Vikings' skills as shipbuilders and sailors meant they could be effective sea pirates.

5 **Analyse** the significance of shipbuilding in Viking society. Remember, when you analyse something, you need to break it down and explain how the concepts relate to each other. In this case, think about what impact shipbuilding had on Viking society.

Evaluate and create

6 Use Source 6 as inspiration to **create** Norse names for the items displayed in Source 7.

7 Use the internet to **research** the Battle of Hastings in 1066. Look for information about (and images of) the Bayeux Tapestry – a medieval embroidery that retells the events leading up to the battle. Source 10 is an example of an image from this tapestry. Start at the beginning of the tapestry and click through, scene by scene. Locate the section where William the Conqueror's warriors are loading up their ships to invade England. Study it carefully. How do they transport chain-mail tunics?

Weblink
The Bayeux Tapestry

9B

RICH TASK

Quizlet

Revise the key terms you have learnt so far.

Viking *berserkers*

During the Viking Age, people across Western Europe most feared a group of Viking warriors known as the *berserkers*. This group fought in a frenzy, while clad in the skins of bears or wolves. In fact, the word *berserker* means 'bear coats'. *Berserkers* seemed not to fear death, injury or pain. Today, one legacy of the Vikings is the English word 'berserk', which is used to describe a violent rage.

Source 11

> [A] demonical frenzy suddenly took [a *berserker*]; he furiously bit and devoured the edges of his shield; he kept gulping down fiery coals; he snatched live embers in his mouth and let them pass down into his entrails; he rushed through the perils of crackling fires … he had raved through every sort of madness …

An extract from a 1905 translation of *The Nine Books of the Danish History* by the twelfth-century Danish historian, Saxo Grammaticus

Source 12

> Blades and weapons glanced off him [a *berserker*] and he brought down both men and horses in King Hjorvard's forces, and everything which came in his path, he crushed to death with his teeth …

An extract from *Erik the Red and Other Icelandic Sagas*, Gwyn Jones (ed.), Oxford University Press, 1961, p. 313

Source 13 These twelfth-century chess pieces show Viking *berserkers* biting their shields.

Source 14 This sixth-century stone carving from Sweden shows one man with a helmet adorned with the heads of birds and another with the head of a wolf or bear. Bear skins were typically worn by *berserkers*.

KEY SKILL
Communicating & reflecting

Integrating evidence into your explanations

As a student of history, you need to be able to explain how or why something happened. Source 15 shows the structure of a historical explanation.

The best explanations use evidence from a variety of sources to support the point they are making.

It can be difficult to work out how to use supporting evidence in a way that does not disrupt the flow of your own writing. You should avoid simply dropping in quotes or references without introducing them in your own words first. Instead, integrate (combine) the evidence into your own writing by making a smooth transition from your own words to a piece of evidence.

Source 16 contains some key phrases that you can use to integrate evidence into your explanations. This will let your reader know that you are using sources and evidence to support your own ideas.

For more information on this key skill, refer to page 218 of 'The history toolkit'.

Source 15 How to structure an explanation

Introduction	» Clearly state your main idea or argument. » Briefly outline the reasons why an event occurred and its effects.
Body	» Each idea you put forward should be supported by evidence. There should also be some analysis of the evidence to explain its significance or importance. » Avoid personal opinions (e.g. 'I' or 'my').
Conclusion (optional)	» The conclusion provides a short overview of the main ideas you have presented. » Make a conclusion based on the evidence you have used.

Source 16 Phrases to help integrate evidence into an explanation

Written sources
» '**According** to the twelfth-century Danish historian Saxo Grammaticus …' » 'The Icelandic saga *Erik the Red* **suggests that** …' » 'An extract from a 1905 translation of *The Nine Books of the Danish History* **tells us** …'
Visual sources
» 'The depiction of warriors in the sixth-century Swedish stone carving **shows that** …' » 'The twelfth-century Viking chess pieces **demonstrate how** …' » 'The sixth-century Swedish stone carving **reveals that** …'

Practise the skill

1 **Explain** how the *berserkers* may have contributed to the idea that Vikings were a group of lawless warriors, referring to at least two of the sources in this section (Sources 11 to 14) as evidence to support your ideas.

Extend your understanding

Today, many modern conflicts have become infamous (meaning they were widely known for negative reasons) because of their use of 'terror tactics'. These tactics sometimes include the use of 'shock troops' – elite units of soldiers who lead the attack, and often endure heavy casualties.

1 In pairs, conduct some further **research** into Viking *berserkers* and modern shock troops. Create a table that compares the types of tactics used by Viking *berserkers* and twentieth-century shock troops. Consider how the tactics used by both groups might affect:
- the morale (spirit) of the people and fighters on their side
- the morale of the people and fighters against them
- the individual *berserker* or soldier in a shock troop.

9.8 Changes within the Viking homeland

In this topic, you will:

- » consider the political and economic effects on Viking life that were caused by the Viking expansion
- » explore the adoption of Christianity in Viking society as a result of their expansion.

The Viking Age was a period in which many Vikings set sail to foreign lands in order to raid and plunder. The riches they brought back to the Viking homelands changed the political and economic systems that had been in place there for hundreds of years. Over time, many Vikings left their homelands to settle in the places they, or their ancestors, had once raided. Others set out to discover new lands.

Political changes

Warriors returned 'home' from their raids with large stores of plundered **loot** (including prisoners taken as slaves). This started a process of great change in the Viking homelands. In time, this loot made some local Viking rulers very wealthy. Some became so powerful and influential that they no longer needed the support of *jarls* in order to rule. Smaller local tribes began to join under the protection of one ruler, forming larger **kingdoms**. These kingdoms covered the areas we now know as Norway, Sweden and Denmark (see Source 1).

loot
stolen property taken during a violent event

kingdoms
regions ruled by a king or queen

THE KINGDOMS OF NORWAY, SWEDEN AND DENMARK

Source 1 Source: Oxford University Press

Christianity and the Vikings

KEY CONCEPT
Cause & effect

In addition to political and economic changes, one of the most important things that changed life in the Viking homelands was the introduction of a new belief system called Christianity.

During the Viking Age, many of the towns, villages and monasteries that were raided belonged to Christians. A large number of the places in which the Vikings later settled were also Christian lands. In addition to this, in around 1000 CE, Christian missionaries travelled to parts of the Viking homelands to convert as many Vikings as they could. Over many generations, these factors combined to cause the Viking people to change their beliefs. This affected many aspects of Viking behaviour – especially the ways in which people were dealt with after death.

Source 3 is an account of a traditional Viking funeral that was common before the Vikings converted to Christianity.

After converting to Christianity, Vikings adopted similar burial practices to those followed in Christian countries to this day.

Source 2 This is an artist's impression of a Viking cremation before the adoption of Christian beliefs. A boat would be filled with goods and slaughtered animals – even sacrificed slaves – and set on fire. It was then covered with a mound of earth. Stones with **runes** on them might be erected at the site.

Source 3

> The dead chieftain was put in a temporary grave that was covered for ten days until new clothes were prepared for him. They asked which of his *thrall* women wanted to join him in the afterlife and one of the girls volunteered … When the time had arrived for cremation, his longship was pulled ashore and put on a platform of wood. On the ship, a bed was made for the dead chieftain. Soon after, an old woman named the 'angel of death' put cushions on the bed. She was an old witch, stocky and dark. She would be responsible for the ritual and would be the one to kill the *thrall girl*.
>
> An extract from an account of a human sacrifice at a Viking funeral, by the Arab traveller Ibn Fadlan

Many other changes also took place as a result of the shift to Christianity:

- Attacks on Christian communities stopped altogether.
- Human sacrifice ended.
- Many Christian churches were built.
- Many Vikings granted slaves their freedom.
- New Christian festivals were celebrated, such as Christmas; although in some cases, Christian rituals were mixed with elements of traditional Viking beliefs.

For more information on this key concept, refer to page 200 of 'The history toolkit'.

runes
symbols with mysterious or magical significance, sometimes used for protection, luck or to foretell the future

Source 4 Viking treasure found in a field in Yorkshire, England, in 2007; this stash, which had been buried for over 1000 years, included 617 coins.

Economic changes

After they began raiding, the Vikings developed an economy based on exchanging goods for the value and weight of different precious metals. Silver was most commonly used. Much of this silver was brought back to the Viking homeland as loot. Silver items would be broken into smaller pieces until they matched the weights needed to buy other goods, such as cloth, grain and even slaves.

The Vikings also collected taxes (often as coins) from villagers in the places they colonised. In Ireland, the penalty for not paying taxes to the Viking rulers during the eighth century CE was to have your nostrils slit with a knife. This is where the saying 'to pay through the nose' comes from.

Over time, the Vikings developed an economy based on money – that is, one where a particular coin had a particular value. This is comparable to the way our currency works today. Most of the places the Vikings raided and colonised had similar economies. In many cases, Vikings even copied the designs of coins used in the regions they colonised. By the late tenth century, the kings of the emerging kingdoms of Sweden, Norway and Denmark were all issuing their own currencies.

Analyse this!
Viking treasure

9.8 CHECK YOUR LEARNING

Review and understand

1 What was the Viking Age?
2 In your own words, **define** 'loot' and give two examples of plundered loot.
3 **Identify** where the expression 'to pay through the nose' came from. What does this expression mean?

Apply and analyse

4 Working in pairs, **explain** the effects of plundering and expansion in Viking society back home. Copy and complete the following table, identifying as many effects as you can:

Political effects	Economic effects

5 **Summarise** in a short paragraph how conversion to Christianity changed the traditional burial practices of the Vikings.
6 **Analyse** Source 3 by answering the following questions:
   a Is it a primary or secondary source?
   b Who wrote this source and why do you think they wrote it?
   c What does this source tell you about Viking society?
   d Do you think this source is biased? **Explain** your answer.

Evaluate and create

7 Use the internet to **research** Viking runes. Draw the runes for the following words:
   - water or ocean
   - man
   - protection or defence.
8 Large Viking kingdoms formed in areas we now know as Norway, Sweden and Denmark. In small groups, **discuss** the potential strengths and weaknesses of large Viking kingdoms (rather than smaller local tribes).

9.9 Changes in other societies

In this topic, you will:

» explore the Viking raids on Britain, including the attack on Lindisfarne.

Viking societies were not the only ones that changed as a result of the raids. The societies that Vikings encountered also experienced many changes. Deals were struck between Viking leaders and the rulers of places they raided. Some of these deals involved payments of money, while others involved grants of land. In time, the language, customs and beliefs of Viking settlers mixed with those of the local people, changing both societies.

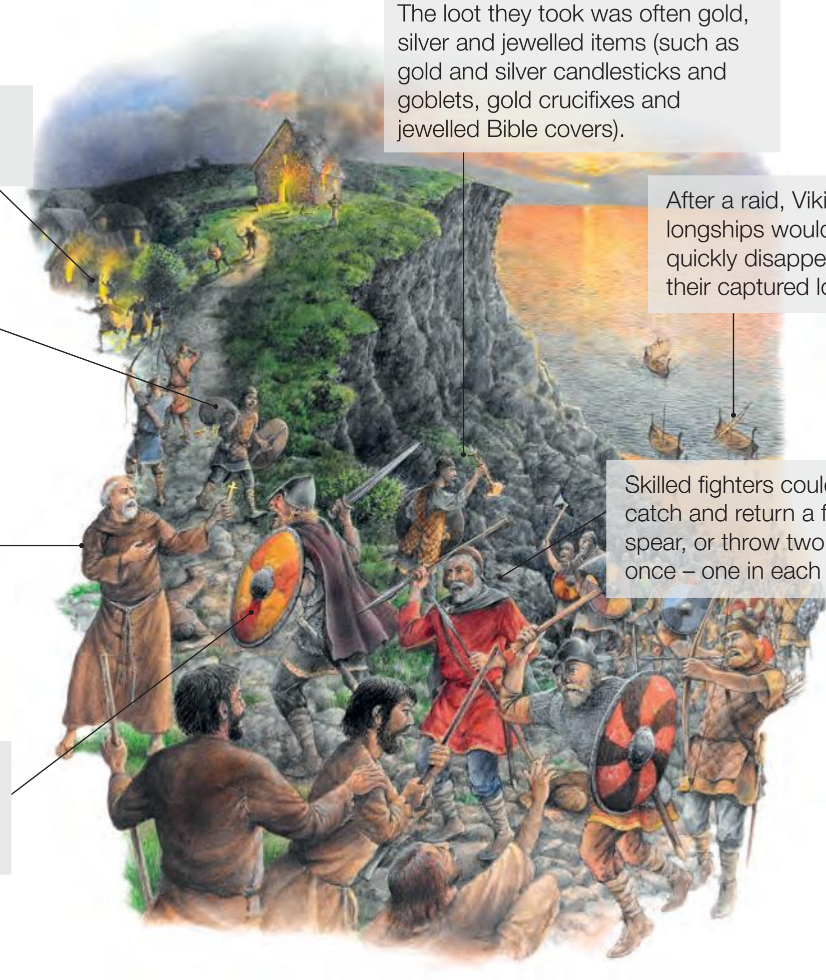
The first Viking raids

Anglo-Saxons
a Germanic people who settled in Britain in the 400s CE; they drove the local Celtic people to the land's extremities

The *Anglo-Saxon Chronicle*, a collection of records kept by the **Anglo-Saxons**, lists 787 CE as the year of the first Viking attack on England. Three Danish Viking ships came ashore in the south of the country. They were met by a royal official who assumed they were merchants. The official intended to escort them to the king's town, so that they could pay the required taxes. Instead, they murdered him.

Six years later, Vikings attacked the Christian monastery at Lindisfarne, an island off the coast of north-east England. This was one of Britain's most sacred sites. The attack was the beginning of 200 years of uncertainty and terror for many monasteries and settlements in lands around the Viking homelands.

Source 5 An artist's impression of a Viking raid on an English monastery; raids like these brought about many changes in societies across Europe.



Source 6

> [I]t is nearly 350 years that we and our fathers have inhabited this most lovely land, and never before has such terror appeared in Britain as we have now suffered from a pagan race … Behold, the church of St Cuthbert spattered with the blood of the priests of God …

A letter from Alcuin, a scholar, to Ethelred, King of Northumbria, 793 CE

Source 7

> The number of ships grows: the endless flood of Vikings never ceases to grow. Everywhere Christ's people are the victims of massacres, burnings and plunderings. The Vikings conquer all in their path and nothing resists them.

A translation from the writing of the Frankish monk Ermentarius of Noirmoutier, 860 CE

Many written accounts describe the fear and terror of the people subject to Viking raids: see, for example, Sources 6 and 7.

As illustrated in Source 5 on the previous page, the first Viking raids were hit-and-run affairs, timed and designed to cause maximum panic. There was no long-term plan behind them – the aim was just to plunder. Over time, though, Viking attacks along rivers pushed deeper into Europe and Asia. The Vikings also extended their plundering missions into modern-day Wales, Scotland and Ireland.

Key skill worksheet
Sequencing events: Viking raids

The end of Viking raids in Britain

In 865 CE, Britain was invaded by a huge Viking army from Denmark. This time, the motive was conquest, not plunder. Within a year, Vikings controlled the Northumbrian city of Jorvik (now known as York). By 870 CE, they controlled every Anglo-Saxon kingdom in England except Wessex.

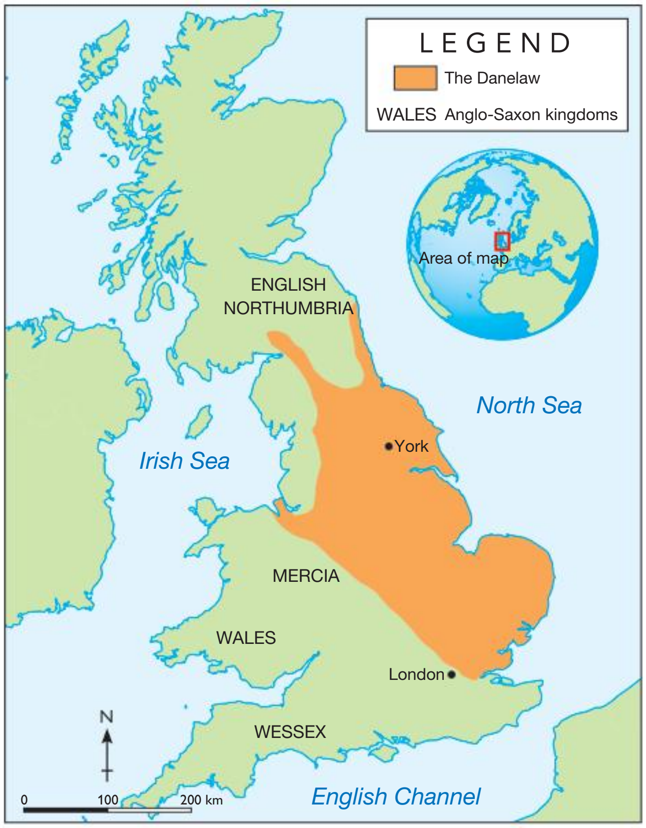
From 871 to 899 CE, a man called Alfred (later Alfred the Great) was the King of Wessex. King Alfred fiercely resisted Viking attacks. By 878 CE, he had forced the Viking leader, Guthrum, to accept a truce – and to convert to Christianity. As part of the peace treaty the two men drew up, King Alfred agreed that the Danish Vikings could take an area in England as their own. This agreement and the area of land that came under it became known as the ***Danelaw*** – meaning 'the area where the law of the Danes is enforced' (see Source 8). Over the next 100 years or so, Viking traditions, beliefs and language took hold in the former Anglo-Saxon community, influencing the history and society of England.

Danelaw
an area in north-west England (which includes the city of York) that the King of Wessex gave to the Vikings in exchange for their stopping raids of the region

Viking raids continued, on and off, after King Alfred's rule. Instead of fighting the invaders, some English kings preferred to pay the Vikings to leave them in peace. In 991 CE, King Ethelred became the first English king to make these kinds of payments to the Vikings. They became known as *Danegeld* (meaning Danes' money). In 1007 CE alone, the English paid *Danegeld* of nearly 13 500 kilograms of silver. The payments put a crushing weight on the English economy.

In 1016, the council that appointed English kings asked the then King of Denmark, Cnut, to become England's king. King Cnut ruled England wisely and well until his death in 1035. His reign largely ended the era of Viking raids in England. They stopped altogether with William the Conqueror's victory at the Battle of Hastings in 1066.

THE AREA OF THE *DANELAW*, 878 CE



Source 8 Source: Oxford University Press

Key skill worksheet
Analysing cause & effect: The Viking raids

I used to think, now I think

Reflect on your learning about the Vikings in Britain and complete the following sentences.

- I used to think …
- Now I think …

What has changed in your understanding?

9.9 CHECK YOUR LEARNING

Review and understand

1 **Identify** when the first-ever recorded Viking attack on Britain took place.

2 In your own words, **define** '*Danelaw*'.

3 What was *Danegeld*? **Describe** how was it supposed to help keep the English safe from Viking raids.

Apply and analyse

4 Use the information in Source 5 to **explain** how Vikings gained wealth by raiding.

5 **Analyse** Source 6 by answering the following questions:
   a Is it a primary or secondary source?
   b Who wrote this source and why do you think they wrote it?
   c What does this source tell you about how life changed for people in Britain before and after the Viking raids?
   d Can you identify any bias in this source? **Explain** your answer.

6 **Analyse** Source 7 by answering the following questions:
   a Is it a primary or secondary source?
   b Who wrote this source and why do you think they wrote it?
   c What does this source reveal about how some people felt about Viking attacks?
   d Can you identify any bias in this source? **Explain** your answer.

Evaluate and create

7 Imagine that you are a monk or villager living in Lindisfarne at the time of the Viking attack. Think about how this event might have changed your lifestyle. Write a paragraph, from your perspective, detailing how you felt and how you reacted.

8 Sources 6 and 7 give us insight into perspectives of the people who were raided by the Vikings. As a class, **discuss** why it is important to look at different perspectives. Refer to page 214 of 'The history toolkit' for more information on perspectives.

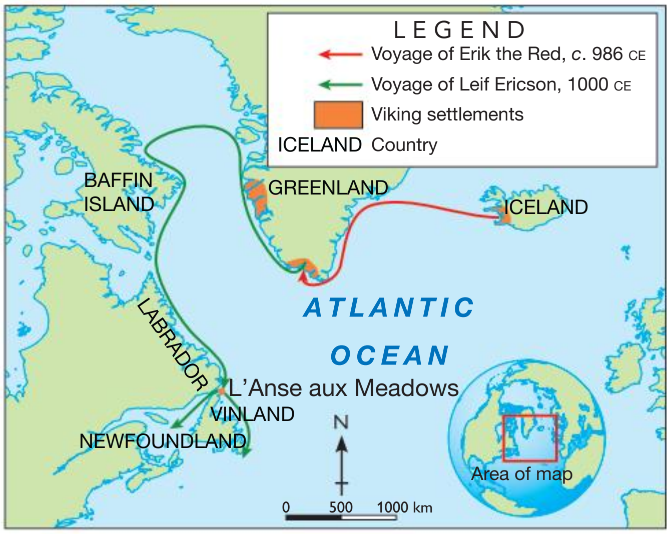
9.10 Significant individual: Leif Ericson

In this topic, you will:

» outline the life and expeditions of Leif Ericson.

The first European explorer to find the North American continent was a Viking by the name of Leif Ericson. In fact, Vikings were already living in North America 500 years before Christopher Columbus even came close to its shores.

THE VOYAGES OF ERIK THE RED AND HIS SON LEIF ERICSON



Source 9 Source: Oxford University Press

Leif and his crew landed in what is now Canada. This significant event was recognised in 1964, when the US president declared 9 October as 'Leif Ericson Day'.

Leif's early life

Leif was the second son of the Viking explorer Erik the Red; he was born in Iceland around 970 CE. In 982 CE, when Leif was about 12 years old, his father was banished from Iceland for killing a man. Erik and his family then set out in a boat with slaves and supplies, heading west. He called the land he found Greenland. There he settled, later encouraging other Icelanders to join him.

Finding North America

Different accounts (known as sagas) have been written about Leif finding North America. As a result, there is some debate among historians as to how he did so. According to *Eiríks Saga* (thought to have been written in the thirteenth century), Leif visited Norway in 999 CE with gifts for the king. He stayed for a year and converted to Christianity. He then returned to Greenland with the intention of carrying out the king's request to convert Greenlanders to Christianity. However, he was blown off course, ending up probably in what is today known as Newfoundland on the Canadian east coast.

Another account, *Groenlendinga Saga*, is generally considered to provide more reliable evidence, even though – like *Eiríks Saga* – it was written more than 200 years after the events occurred. It states that Leif's finding of North America was far from accidental. In 986 CE, Bjarni Herjólfsson, a Norwegian explorer, arrived in Greenland looking for his father (who had recently emigrated from Iceland with Erik the Red). Along the way, Bjarni got lost. He reported to Leif that he had seen a wooded, hilly land to the west of Greenland, but it was more than a decade before Leif Ericson acted on this news.

Leif bought Bjarni's boat and, in around 1000 CE, set off with a crew of about 35 people to find the unknown land Bjarni had spoken of. One year later, after making two landings – first in a place he named Helluland (Flat Rock Land, thought to be on what is now Baffin Island) and second in a place he named

Key skill worksheet
Determining historical significance: Leif Ericson

Source 10 A statue of Leif Ericson in the capital of Iceland, Reykjavik

Markland (Wood Land, believed to be on the Labrador coast) – he settled in a grassy place he called Vinland (Wine Land) (see Source 11). He and his crew built shelters and spent the winter there, before returning to Greenland.

Where Leif settled

Historians cannot say exactly where Leif Ericson's expedition landed in North America, but most agree it was probably somewhere on the east coast of Canada – possibly Newfoundland. In 1963, archaeologists discovered the remains of a Viking settlement in a place now called L'Anse aux Meadows in Newfoundland (see Source 12). Radiocarbon dating of charcoal found at the site indicates it was used in around 1000 CE.

Later visits

After Leif returned to Greenland, his brother and other family members made trips to the settlement he had established. Leif never returned though, and he died in 1020 CE. The new Viking settlement remained for a few years, but faced attack from the indigenous people of North America. Eventually, these attacks forced the Vikings to abandon the settlement and return to Greenland.

Source 11 An artist's impression of Leif Ericson and his crew landing in Vinland in 1001 CE

Source 12 The heritage-listed site of L'Anse aux Meadows in Newfoundland, Canada, with its reconstructed dwellings

9.10 CHECK YOUR LEARNING

Review and understand

1 **Describe** how and why Leif Ericson ended up in Greenland.

2 **Identify** what eventually forced the Vikings to abandon their settlement in North America.

Apply and analyse

3 How reliable are Viking sagas that were written over 200 years after the events took place? **Explain** your answer.

Evaluate and create

4 How do you think Leif's finding of North America affected the Viking society in Greenland? **Justify** (give reasons for) your opinion.

5 Use Source 9, together with Google Earth and images collected from the internet, to **create** a travel diary describing what Leif might have seen on his journey from Greenland to Vinland.

6 In pairs, research the life of Leif further. **Construct** a timeline plotting important events in his life, using data from *Groenlendinga Saga*.

9C RICH TASK

Quizlet
Revise the key terms you have learnt so far.

The Viking legacy

The Viking festival known as Yule dates back thousands of years, and was celebrated long before Christianity arrived in the Viking homelands. Yule was a winter celebration held for 12 days in December to celebrate the winter solstice (the shortest day and longest night of the year). During Yule, Vikings would sacrifice animals to honour the gods, feast, dance and decorate trees. They even gave presents.

If you have ever wondered where many Christmas traditions come from, the following sources may help.

Source 13

> It was ancient custom that when sacrifice was to be made, all farmers were to come to the temple and bring along with them the food they needed while the feast lasted. At this feast all were to take part of the drinking of ale. Also all kinds of livestock were killed in connection with it … the meat of the animals was to be boiled and served as food at the banquet.
>
> A description of Yule celebrations by Snorri Sturluson, *c.* 1230, in *Heimskringla: History of the Kings of Norway*, trans. M Lee Hollander, University of Texas Press, 2007

Source 14 During Yule celebrations, Vikings would cut down a large tree and carve the trunk with special runes to honour the gods. They would burn the log over the 12 days of the Yule celebration. Today, in many countries around the world, families celebrate Christmas by eating a cake known as a yule log.

Source 16 The tradition of Christmas trees dates back to pre-Christian times. During Yule, Vikings decorated evergreen trees with pieces of food and clothes, small statues of the gods, and carved runes.

Source 15 A comparison of modern Christmas traditions and practices of Vikings

Christmas celebrations or Christian traditions	Yule celebrations or Viking traditions
Santa Claus rides a flying sleigh pulled by magic reindeer.	The Viking god Thor rode a flying chariot pulled by magic goats.
There are 12 days of Christmas.	Celebrations of Yule lasted for 12 days.
Christmas trees are decorated.	Vikings decorated evergreen trees with clothing, food and other ornaments.
Father Christmas (Santa Claus) brings gifts.	The Viking god Odin was thought to visit families in secret during winter and leave gifts.

KEY SKILL
Asking questions & conducting research

Extracting information to answer research questions

Presenting a series of historical arguments in writing is an important skill for all historians. It is particularly useful when convincing others of your point of view.

When developing a written historical argument, follow these steps:

Step 1 Create a key question to guide your research. This is the question that you want to 'answer' through research. For this exercise, your question might be something like: 'How much have Viking practices influenced our Christmas traditions?'

Step 2 Look closely at each source to find evidence. To do this, you might read your textbook, research online or visit the library.

Step 3 Extract information from the sources. Be sure to find a good spread of information to avoid a biased (one-sided) historical argument. To help extract information from your sources, you could create a table like the one in Source 17.

Research question: How much have Viking practices influenced our Christmas traditions?				
	Source 13	Source 14	Source 15	Source 16
Links to our Christmas traditions today				
Does not link to our Christmas traditions today				

Source 17 An example of how to extract information from sources in order to develop a written argument

Step 4 Work out which sources agree with each other and which do not. Do these sources give you a clear answer to your question, or are they at odds with each other?

Step 5 Write your argument in one or more paragraphs, using the sources as evidence. You should explain why particular sources support your argument, and give reasons why the sources that disagree with you are not as important or valid. For more information on how to include evidence from sources in a written explanation, see page 247.

Step 6 Acknowledge your sources by referencing them (see page 205 of 'The history toolkit').

For more information on this key skill, refer to page 203 of 'The history toolkit'.

Practise the skill

1 Look closely at Sources 13 to 16.

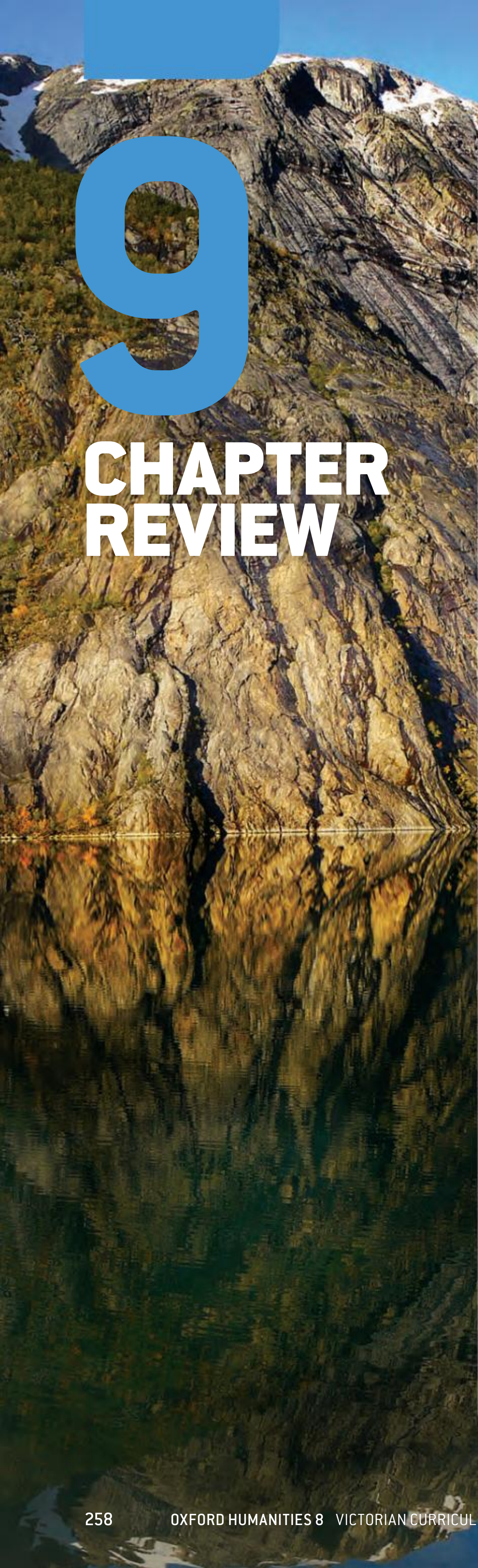
2 Using the steps outlined above, **create** your own research question about the Vikings and Christmas traditions. Extract the information from each source using the table like the one provided in Source 17.

3 Write your own historical explanation in response to this prompt: 'Many Christmas traditions today began with the Vikings.'

Extend your understanding

1 **Discuss** with your classmates why you think Christians would have included so many non-Christian traditions in their celebrations of Christmas.

2 Now, imagine you are important members of the Catholic Church, trying to bring Christianity to the Vikings. Stage a debate about whether to include local customs in your Christmas celebrations, or whether to stay true to the religious story and ignore local non-Christian customs.



9 CHAPTER REVIEW

Review questions

9A How was Viking society organised?

1 **Identify** two of the most common occupations for Vikings. (2 marks)

2 **Outline** the three main social classes of Viking society. (3 marks)

3 **Explain** why Viking women were unusual compared with women in many other societies in Europe at the time. Use two examples to support your answer. (5 marks)

(Total: 10 marks)

9B What developments led to Viking expansion?

1 **Describe** the *berserkers*. Why were they so effective and feared as warriors? (2 marks)

2 **Identify** one of the four possible reasons why Vikings began raiding. **Explain** why this led to Viking expansion. (4 marks)

3 **Suggest** how the Vikings' knowledge of sailing and shipbuilding helped their ability to expand their territory. Use examples to support your answer. (4 marks)

(Total: 10 marks)

9C How did Viking conquests change societies?

1 **Describe** how the Vikings' religion changed after they began raiding. (2 marks)

2 **Summarise** how Viking raids changed life for people in Britain. (3 marks)

3 **Identify** two ways that Norse culture is present in today's society. **Explain** how these examples display the historical concept of continuity and change. (5 marks)

(Total: 10 marks)

Review activity

Read the following paragraphs and answer the questions below.

Did shield-maidens exist?

Viking mythology often included stories of shield-maidens (female warriors). By contrast, there are few references to shield-maidens in artefacts, drawings and runes. As a result, historians have traditionally believed these stories to be nothing more than myths.

In the 1870s, archaeologists excavated the gravesite of a Viking warrior they assumed was a man in Birka, Sweden. In the grave, they found a human skeleton, the skeletons of two horses, a sword, an axe, a shield, a bow with arrows, and a board game similar to chess. Historians believe that the board game might indicate that the warrior was a general.

But in 2017, DNA testing found the body in the grave was a woman. Since then, historians have been debating the historical significance of this. Some historians believe the warrior is proof that shield-maidens not only existed, but also could be generals. Some historians believe that the warrior is probably the only woman among mainly male warriors, and others believe that there is too little evidence to make a conclusion.

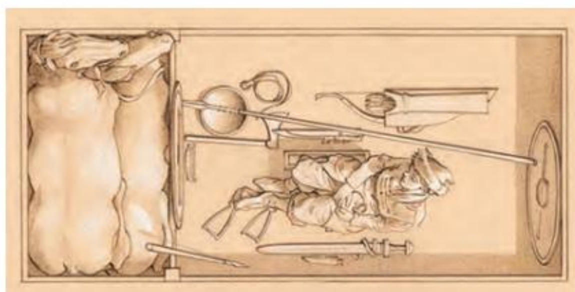
Source 18 An artist's drawing of the shield-maiden

1 **Identify** where the archaeologists found the warrior's grave. (1 mark)

2 **Identify** three items that would indicate that it was a warrior's grave. (3 marks)

3 **Explain** why historians would have previously thought it was a male person's grave. (3 marks)

4 Using your knowledge of the Vikings, **explain** the significance of the two horses in the grave. (3 marks)



Source 19 An artist's drawing of the burial chamber

5 Write a paragraph evaluating the historical significance of this gravesite. In your paragraph, address the following points:
- Why is this gravesite historically significant? (2 marks)
- What might different historians conclude about which Vikings could be warriors? (3 marks)
- What might the DNA testing conducted in 2017 mean for future (and previous) discoveries of Viking warrior gravesites? (5 marks)

(Total: 20 marks)

Check your Student obook pro for these digital resources and more:

Student book questions Chapter 9	**Key skill worksheet** Communicating & reflecting: Chapter 9	**Quizlet** Play a game of Quizlet on The Vikings.	**Chapter review quiz** Chapter 9

CHAPTER 10

Medieval Europe

Europe's medieval period began with the fall of the Roman Empire, around 476 CE. It is an era well known for its changing monarchs, battles, castles, feasts and knights. Perhaps more powerful than any king, however, was Christianity. Religion not only guided everyone's daily life, but also led empires into war and offered salvation when plague struck.

Medieval Europe saw the introduction of feudalism. This was a social system that strictly controlled the population, threatening severe forms of punishment for wrongdoers. Gradually, important social and cultural changes were brought about by the growth of towns and trade, the Magna Carta, and innovations such as the printing press.

In 1347, Europe was hit by a deadly plague – known as the Black Death – that killed around 30 per cent of the population. It took a century for the population to recover. By 1500 CE, a new age of inventors, philosophers and explorers had brought an end to the medieval period and led to the birth of modern Europe.

Source 1 Bodiam Castle is located near the village of Robertsbridge in south-east England. It was built in 1385 during the medieval period in Europe. The high walls and moat of the castle were designed to protect the lord of the manor and his family (as well as villagers living in the area) in the event of an attack.

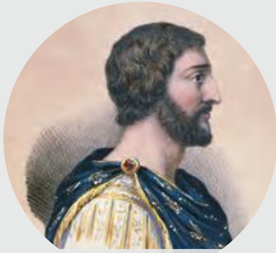
10A
How were societies in medieval Europe organised?

10B
Why did societies in medieval Europe change?

10C
What developments influenced life in medieval Europe?

10D
How did the Black Death affect medieval Europe?

10.1 Medieval Europe: A timeline



An artist's impression of Charlemagne, Holy Roman Emperor

A scene from the Bayeux Tapestry depicting Norman cavalry troops disembarking for their battle with Saxon forces at Hastings in England

400 CE | 800 | 1000 | 1100

466
The Roman Empire in Western Europe collapses. The medieval period begins.

800
Charlemagne, King of the Franks, is crowned Holy Roman Emperor.

813
Charlemagne dies.

1042
Edward the Confessor becomes King of England.

1050
A militant Islamic group, the Seljuk Turks, takes control of Jerusalem.

1066
Edward the Confessor dies. Harold Godwinson declares himself king. William of Normandy invades England, defeats King Harold at the Battle of Hastings, and is crowned King William I of England.

1096
The First Crusade begins – this is the first of eight wars to be fought between Christians and Muslims over the next 175 years.

1154
Henry II becomes King of England.

Source 1 A timeline of some key events and developments in the history of medieval Europe

10.1 CHECK YOUR LEARNING

Review and understand

1 **Identify** the year in which the Battle of Hastings took place, and who fought in it.

2 What were the Crusades? In what year did they begin?

Apply and analyse

3 What is the Magna Carta? **Suggest** why it is still important today.

Evaluate and create

4 In pairs or small groups, **research** the Crusades. Use the questions below to guide your research.

a How many Crusades were there in total?

b What was the aim of the First Crusade?

c Using the information you have gathered, **create** your own timeline of the Crusades. Include an image to represent each one.

An illustration from the Toggenburg Bible (*c.* 1411) of victim of a plague known as the Black Death

1187
Muslim forces again capture Jerusalem, providing a motive for the Third Crusade.

1200

1215
The Magna Carta – the first-ever document outlining the rights of the English people – is drawn up. King John is forced to give it his royal seal.

1300

1315
The Great Famine begins. It lasts for two years and kills millions of people across Europe.

1337
The Hundred Years War between England and France begins.

1347
A deadly virus breaks out in Sicily and quickly spreads across Europe, killing between 50 and 90 per cent of those who catch it. The pandemic becomes known as the Black Death.

1381
The Peasants' Revolt takes place in England – peasants revolt against strict rules imposed on wage rises and working conditions, following the severe labour shortages caused by the Black Death.

1400

***c.* 1450**
Johannes Gutenberg invents the printing press in Germany.

1500 CE

An artist's impression of Gutenberg's printing press

Sequence this!
Events in medieval Europe

10.2 Feudalism in medieval Europe

In this topic, you will:

- outline the significant social changes caused by the introduction of feudalism to medieval Europe.

Europe's medieval period lasted for about 1000 years, beginning almost immediately after the collapse of the Roman Empire in Western Europe in 476 CE. It was a time of great change over a vast area – from the Viking homelands in the north to the Mediterranean Sea in the south, and from the Atlantic coast in the west to the borders of Russia and the peoples of the east (see Source 2). During the medieval period, the borders and rulers of European societies changed countless times, as people competed for territory and power.

Source 2 A map of medieval Europe in 1360 (taken from a 1911 atlas of historical maps)

The origins of feudalism

lords
wealthy nobles under the system of feudalism

vassals
people who offered their loyalty and service to a lord in return for his protection and the granting of land

Without the Roman army to enforce the laws, society largely broke down. Between 476 and 800 CE, barbarian raids from aggressive groups – such as the Huns, Visigoths and Vandals – were common (see Source 4 in topic 8.2 on page 8.4). Over time, the term 'Dark Ages' was often used to refer to this period of constant warfare.

People had to find new ways to protect and provide for themselves. As a result, they moved onto lands owned by wealthy and powerful **lords**, where they could be protected by the lord's private army and take shelter in his castle during attacks. As payment to their lord, these people, called **vassals**, worked the land for him and tended his animals.

This was the beginning of **feudalism** – a social system based on rights and obligations around land ownership. Feudalism shaped medieval Europe for hundreds of years.

Source 3 A medieval artist's impression of peasants harvesting grapes and tending grapevines on a feudal manor (a large country house, with land); in the foreground, the lord of the manor is inspecting their work.

feudalism
a set of legal and military customs that served to organise the society of medieval Europe and Japan; under feudalism, a lord gave a fief (parcel of land) to a person (called a vassal) in exchange for service and loyalty

The Domesday Book

This precious book, containing 832 pages, was created in 1086 under the reign of William the Conqueror. Similar to a **census** today, it recorded the landowners, property and population in medieval England, so it is a valuable source of evidence. Historians believe this book had two main purposes: to help the new ruler understand who owned which parts of the land, and to assess the kingdom's wealth. This was particularly important so that William could work out how to tax the population. Bishop Robert of Hereford noted in 1086: 'he sent his men … into every shire and had them find out … what dues [taxes] he ought to have in twelve months … nor indeed one ox or cow nor one pig was there left out.'

The term 'Domesday' comes from the word 'doom' in medieval England, meaning 'law'. Historians believe that 'Domesday' is a reference to 'Doomsday', or 'Judgment Day' – as the book granted William the power to assert his final decision, or 'judgment'.

In total, the Domesday Book recorded 30 000 manors, 13 000 villages, 50 castles and 16 000 **knights**.

For more information on this key concept, refer to page 201 of 'The history toolkit'.

Source 4 The Domesday Book is now held in the UK National Archives.

KEY CONCEPT
Evidence

census
a 'head count' or audit of the number of people living in a particular place at a particular time; information collected during a census often includes age, occupation, income, etc.

knights
warriors in medieval Europe

Quiz me!
A quick quiz on feudalism in medieval Europe

10.2 CHECK YOUR LEARNING

Review and understand

1 In your own words, **define** the term 'Dark Ages'.

2 Why did feudalism emerge after the fall of the Roman Empire in Europe?

Apply and analyse

3 **Examine** Source 3. How has the artist depicted the lord to appear the most powerful person in the image?

4 **Explain** how the Domesday Book gave William the Conqueror more power.

5 **Compare** the map in Source 2 to a modern-day map of Europe (there is one in the back of this book). How are they similar (continuity) and how are they different (change)? Remember, when you compare two things, you must talk about how they are similar and how they are different. Similarities are an example of continuity, while differences are an example of change.

10.3 Key social groups in medieval society

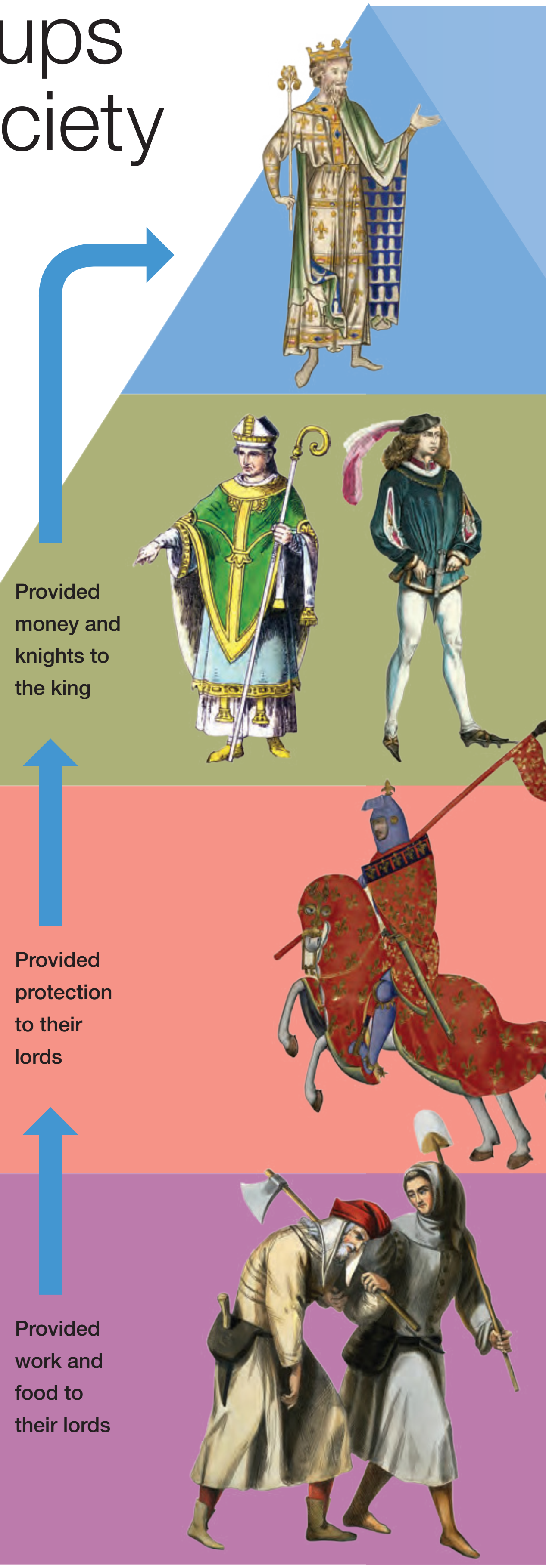
In this topic, you will:

» explore the structure of feudal society in medieval Europe.

Feudalism was a way of organising a society through a hierarchy. A hierarchy is a social structure that organises people with the most important group on top and others ranked beneath. In a feudal society, everyone from the king to the poorest peasant had certain rights (things they could expect), and responsibilities (work they had to perform in return).

The feudal hierarchy was made up of mutual (two-way) relationships between lords (people higher up in the hierarchy) and vassals (people lower down in the hierarchy). For example, a king (lord) had an obligation to the nobles directly below him (his vassals). He provided them with land to live on (known as a fief). In return, each noble promised to obey the king and provide military support when needed.

In a feudal system, a person could not change their social position. If a person was born as a peasant, they died as a peasant. Peasants could not become nobles, no matter how hard they worked or how intelligent they were.



Source 5 The hierarchy of medieval societies under feudalism

Interactive
Social groups in medieval Europe

King

- The king owned all the land. He kept 25% and granted 75% to his vassals.
- He administered the country, directed wars and fended off challengers to the throne.
- He enjoyed wealth and privileges, such as banquets and balls.

Nobles, lords and bishops

- Nobles inherited their family titles. They made up less than 1% of the population.
  - They were granted 75% of the land belonging to the king.
  - They lived in large manors or castles on a fief. Every fief had a church with many Christian workers, such as friars, monks and nuns.
- Lords ruled over all business matters, and collected taxes from peasants.
- Bishops also collected taxes, but did not pay taxes to the king. They became very wealthy.

Knights

- Knights were a small social group who protected their lords and would fight for the king when required. Most were the sons of nobles.
- They provided security within the fief, and received income (food and supplies) from the peasants.
- Knighthood could be earned through official training, starting as a page (a servant of a knight) at the age of 7. At 14, they received a sacred sword from the bishop and became a squire. As a squire, they fulfilled honourable duties for their knight. If they proved their bravery, they became a knight at 21.

Peasants and serfs

- Peasants and serfs were the labourers and farmers – producing all the food, supplies and services. They made up over 90% of feudal society.
  - They were heavily taxed and paid rent to those above them.
  - Their lives were hard, with little rest or comfort. They worked long hours on the fields with simple tools, such as sickles.
- Peasants had a few political rights and some owned land.
- Serfs had no political rights and did not own any land.

10.3 CHECK YOUR LEARNING

Review and understand

1. What is a fief?
2. **Describe** the relationship between a vassal and a lord.

Apply and analyse

3. What is a hierarchy? Do we have hierarchies of any kind in Australia today? **Explain** your answer.
4. **Suggest** how a medieval ruler's position might have been strengthened by giving fiefs to those who provided loyalty and support.
5. **Distinguish between** the main responsibilities of each group shown in Source 5. What are the differences between each group?

10.4 The feudal manor

In this topic, you will:

» extend your understanding of feudalism by exploring the feudal manor.

Under feudalism in Europe, land that did not belong to the ruler or the Church was mostly divided into manor lands, called *demesnes* (meaning the lord's land, or domain). Each of these estates was owned by a noble or knight – the manor and its lands would have been given to him by his own lord, as a fief. Serfs farmed the lands to meet the lords' needs. Serfs were peasants who lived and worked on land; they had to obey the landowner.

The lord of a manor provided serfs on his estate with a place to live and the means to survive, and they provided him with their labour. Serfs also paid taxes (a portion of what they produced on the land they farmed) and a tithe. A tithe was a tax paid to support the Church. It was a tenth of the money a person earned, or of the goods they produced. Most serfs were not free to leave the manor lands and had to have the lord's permission to do many everyday tasks.

Source 6 A modern artist's impression of a typical feudal manor and its lands

10.4 CHECK YOUR LEARNING

Review and understand

1 **Identify** who was responsible for business matters on the manor.

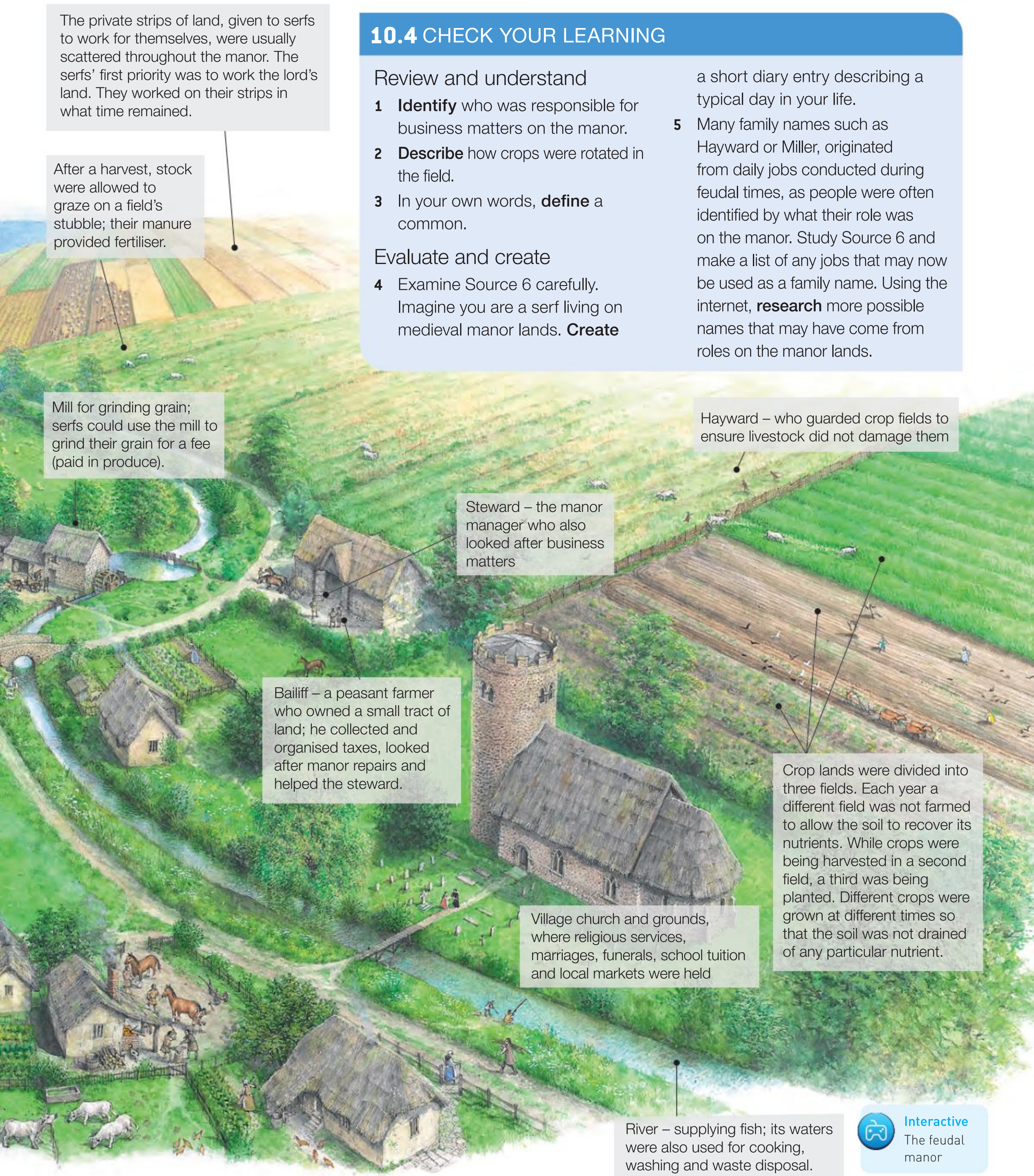
2 **Describe** how crops were rotated in the field.

3 In your own words, **define** a common.

Evaluate and create

4 Examine Source 6 carefully. Imagine you are a serf living on medieval manor lands. **Create** a short diary entry describing a typical day in your life.

5 Many family names such as Hayward or Miller, originated from daily jobs conducted during feudal times, as people were often identified by what their role was on the manor. Study Source 6 and make a list of any jobs that may now be used as a family name. Using the internet, **research** more possible names that may have come from roles on the manor lands.



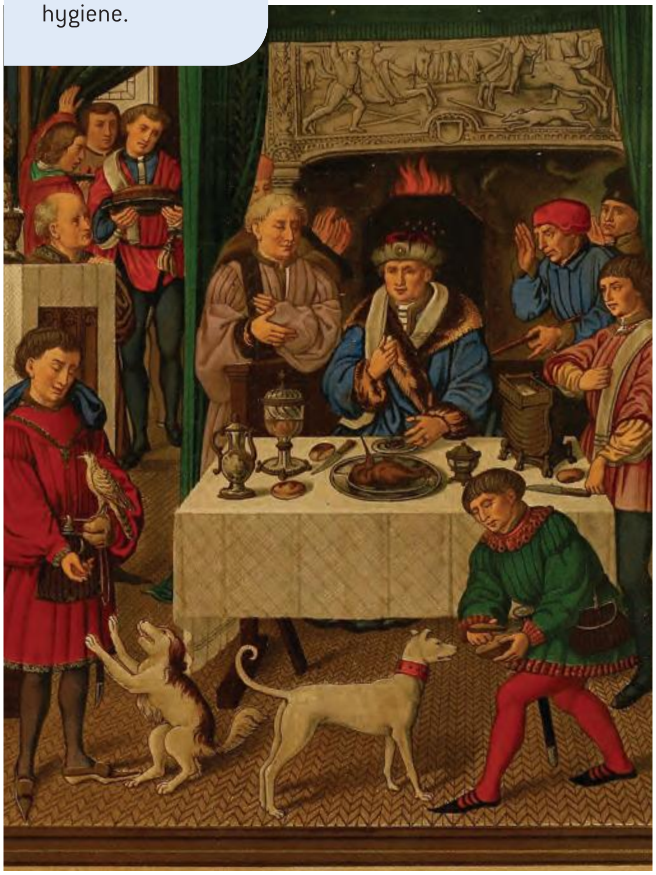
Interactive
The feudal manor

10.5 Daily life in medieval Europe

In this topic, you will:

- compare the lives of the rich and the poor in medieval Europe by examining food, entertainment, fashion and hygiene.

In medieval Europe, the lives of the wealthy and the poor were very different. These differences reflected the social group of which people were members, and could be seen in aspects such as food, entertainment, fashion and hygiene. In some instances, laws enforced these differences.



Source 8 A fifteenth-century illustration of a rich man's feast

Food

The rich ate a range of meats, fish, fruit, soft cheese, eggs, vegetables, sauces, soups, salads, white bread, pies and tarts, and ornate sweet dishes called subtleties. With their food, they drank ale, wine or mead (a brew made from honey and water).

Source 7 A king's appetite

> At six o'clock the king rises and asks what there is for breakfast. 'Sire, a fat chicken and chops.' 'It would be easy to poach me some eggs in meat juice.' The king supervises the preparations, eats four chops, the fat chicken, six eggs in meat juice and a slice of ham and drinks a bottle and a half of champagne; he dresses, sets out to hunt and returns with an incredible appetite.

Extract outlining the feasting of King Louis XVI of France – who reigned from 1774 until 1792, when France was still living under a feudal society – from Leonard W. Cowie, *The French Revolution: Documents and Debates*, Red Globe Press, 1987, pp. 6–7

Banquets were held on important religious feast days and for special events. Important people (such as members of the lord's family) sat at a higher table than other diners. Feasts often lasted for hours. In between the many courses, diners were entertained by acrobats, **minstrels** and **jesters**.

The poor ate a simpler and less varied diet than the rich. It included stews, grainy bread, vegetables and fruit (when available), milk, hard cheese, porridge made from oats or barley, and perhaps some nuts from the forests. Most peasants ate their main meal for the day while working in the fields. They ate very little meat, as they were often too poor to own and raise animals. Hunting for game (wild animals) in the lord's forests was forbidden. Instead, they hunted for rabbits and birds in the fields.

minstrels
medieval singers and musicians who typically wandered around the countryside performing at events (often as part of a small group)

jesters
medieval comedians who joked and 'played the fool' at occasions such as banquets and fairs; they typically wore a multi-pronged floppy hat with bells on it

Entertainment

Generally, hobbies were a privilege for the nobility. For men, activities such as hunting, falconry (training falcons to attack small animals) and playing chess were enjoyed. Hunts were typically conducted in the woods and forests surrounding feudal manors. Entertainment for women might include embroidery, stitching tapestries or listening to musical performances.

The poor did not have many opportunities for entertainment, but during special feasts, such as at harvest time, there might be dancing, dice throwing, ball games and wrestling. Many of the games played by medieval children, such as hopscotch and hide-and-seek, are still played today (see Source 9).

Fashion

The clothes of the wealthy were usually custom-made by tailors using silk, satin or velvet. Women typically wore long, trailing garments with elaborate sleeves and ornate headwear, such as veils. Wealthy men commonly wore tunics, stockings, decorated cloaks and fancy hats. Only royalty could wear gold and silver materials and purple silk.

The clothes of the poor were, by contrast, drab and dull in colour. They were crudely made from coarse cloth, which was woven by peasant women from hand-spun wool or linen.

Wool was a major part of the economy in medieval England, as all manors farmed sheep. It was the job of a man called a fuller to stamp on wool and pound it in a trough of urine all day, in order to soften and whiten so that it could be woven into clothes.

Source 9 This painting by Pieter Brueghel the Elder, *Children's Games* (*c.* 1560), shows a wide range of games played by children in medieval Europe.

Source 10 An artist's impression of a range of garments worn by people in eleventh-century England – the top panel shows the types of clothing worn by common people and soldiers, while the bottom panel shows clothing typically worn by the rich, including the king.

Hygiene

Only the wealthy could afford the luxury of a long, hot bath. This was called a 'stew'. Scented oils, rose petals or herbs such as rosemary and spearmint were added to the water.

For the poor, personal hygiene was very basic. Peasants washed in a dish of cold water. Wood was a scarce and valuable resource for the poor, so it was not wasted on heating water for washing.

Source 11 An artist's impression of a wealthy medieval man enjoying a 'stew'

See, think, wonder

Look at Source 11.

- What do you see?
- What do you think?
- What does it make you wonder?

10.5 CHECK YOUR LEARNING

Review and understand

1 **Describe** one way in which an eleventh-century noblewoman might 'advertise' that she was wealthy by the way she dressed.

2 What did 'having a stew' mean in medieval times? What social group might engage in this activity? Why?

Apply and analyse

3 a **Distinguish between** the diets of the rich and poor by writing a short paragraph on the differences between them.

b Which diet do you think was healthier? Give reasons for your opinion.

4 With a partner, **examine** Source 9 and identify as many medieval games and activities as you can. Create a table and sort the activities into those you recognise and those that seem strange to you.

5 a Read Source 7 and **summarise** the king's perspective.

b What do you think the perspective of the peasant class would be towards this king? **Explain** your answer.

Evaluate and create

6 Refer to Source 10 and conduct some further **research** on the internet in order to design two separate outfits:

- one for a peasant man or peasant woman in medieval England
- one for a nobleman or noblewoman in medieval England.

Sketch and colour your finished garments, ensuring that they follow the established rules and laws of medieval England (in terms of colours, materials and styles).

Quiz me!
A quick quiz on daily life in medieval Europe

10.6 Housing for the rich and poor

In this topic, you will:

» compare the lives of the rich and the poor in medieval Europe by examining their living conditions.

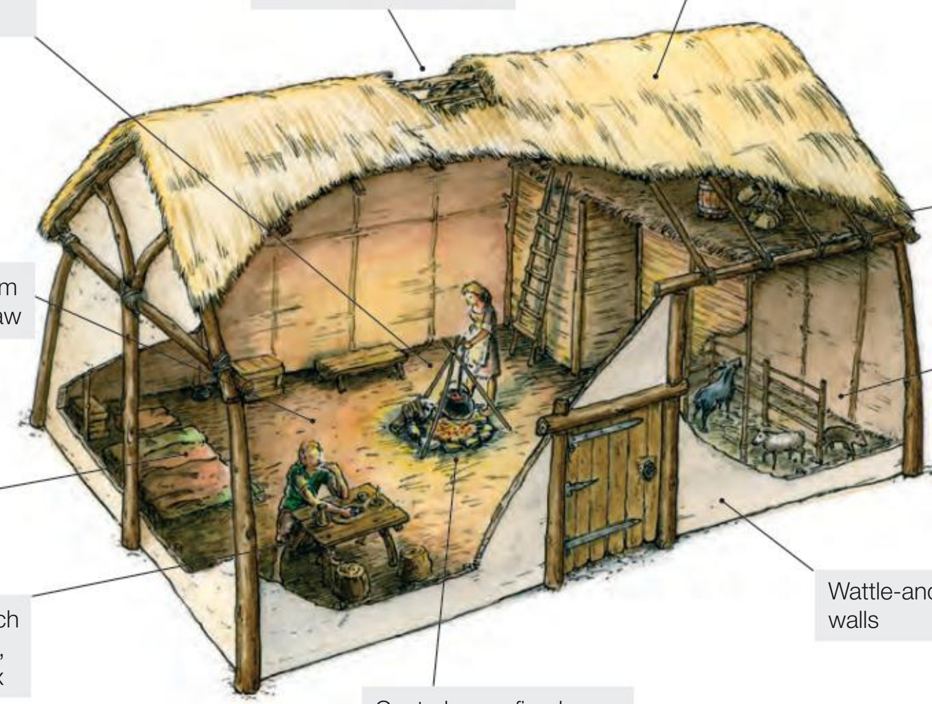
In addition to food, entertainment, fashion and hygiene, there were also marked differences between rich and poor in terms of living conditions.

Living conditions for the poor

Living conditions for the poor were not very comfortable. Peasant farmers often lived in a one- or two-roomed hut, shared with domestic animals such as chickens and pigs (see Source 12). This was often one of a number of similar huts on manor lands (see Source 6 on page 268). These huts were usually dirty, sooty, smelly and dark. Walls were mostly a mixture of mud, manure and sticks (called 'wattle and daub'). They might be painted white with lime. Roofs were made from thatch (straw). Windows were narrow openings that could be boarded up in winter. The toilet was a hole in the ground outside.

Peasants who worked as servants in manor houses and castles lived in more secure and pleasant surroundings; however, their daily lives were hard like those of other peasants, with few personal comforts.

Interactive
A medieval peasant hut



Source 12 An artist's impression of a medieval peasant's hut

Living conditions for the rich

When not fighting wars, the wealthy led mostly comfortable lives, often in manor houses and castles (see Source 17 on page 276). The Church also had great wealth, and certain members lived very comfortably, despite their vow of poverty.

Source 13 A replica of a noble's medieval bathroom

The noble family would wash in tubs (often with the help of servants) and dress. They would also visit the garderobe (a medieval toilet), which was a small, cold room with a seat that opened directly onto a stinking pit or **moat** below. A chamber pot kept in the bedroom was typically used for toilet visits during the night. Strips of torn fabric were used as toilet paper.

After breakfast, the lord and lady would usually visit their private chapel. The lord's tasks for a day might then include making decisions about the manor, receiving rents, presiding over a manor court of law, and planning to visit another castle he owned. At night, there might be a feast for an important guest (perhaps the king) or to celebrate something special, such as the end of a **tournament** (see page 296).

moat
a wide band of water surrounding a built structure such as a castle; it provided some protection in in the event of attack

tournament
a public event held in medieval Europe, similar to a fair or carnival; tournaments featured organised battles and a series of jousts between knights on horseback

Source 14 The restored bedroom of the sixteenth-century French King Henri III in the Château de Blois in France (left) – often, the beds of the wealthy had blankets, sheets, feather pillows, fur covers and linen curtains. Tapestries (right) covered up draughty cracks in the stone walls of castles.

Source 15 This modern-day re-enactment of a medieval tournament shows two knights on horseback, jousting.

Evidence in oral histories

Nursery rhymes, common phrases and sayings have been passed down through generations of storytelling. Historians call this 'oral history'. Oral histories are hard to date back to a specific time, place or event because they do not come from written evidence. Because of this, their origins are contestable (questionable) in nature.

Historians believe that many kings and queens are represented in nursery rhymes. Humpty Dumpty, for example, is believed to represent King Richard III (see Rich task 10B on page 288), who died in battle in 1485 after falling from his horse. Events such as the Black Death and military attacks have been connected to 'Ring a Ring o' Roses' and 'London Bridge is Falling Down', but without more primary evidence, their origins are a source of continued debate.

Some examples of phrases that historians believe may have originated from living conditions during medieval society include:

- 'dirt poor' – referring to the dirt floor of peasants' huts
- 'raining cats and dogs' – referring to the theory that cats and dogs would rest on the thatched roofs of peasants' huts for warmth, but fall off when it rained and became slippery
- 'upper crust' – referring to the fact that peasants were given the burnt bottom half of the loaf, while the wealthy enjoyed the well-cooked upper crust.

For more information on this key concept, refer to page 201 of 'The history toolkit'.

KEY CONCEPT
Evidence

Source 16 A bronze statue of Humpty Dumpty in Coral Springs, Florida

10.6 CHECK YOUR LEARNING

Review and understand

1 **Describe** a typical day for a lord in medieval Europe.

Apply and analyse

2 **Suggest** why there was a high risk of fires in medieval towns.

3 **Compare** Sources 12 and 14. What are the similarities and what are the differences?

Evaluate and create

4 **Research** the history of two or three nursery rhymes or phrases, and outline the suggested theories as to their origin.

For each rhyme or phrase:

- investigate any factual event, person, or place mentioned in each theory.
- explain your own opinion as to how likely the origin of this rhyme or phrase is.
- present your findings as a report or poster, including images.

Remember to include references to show where you found your information.

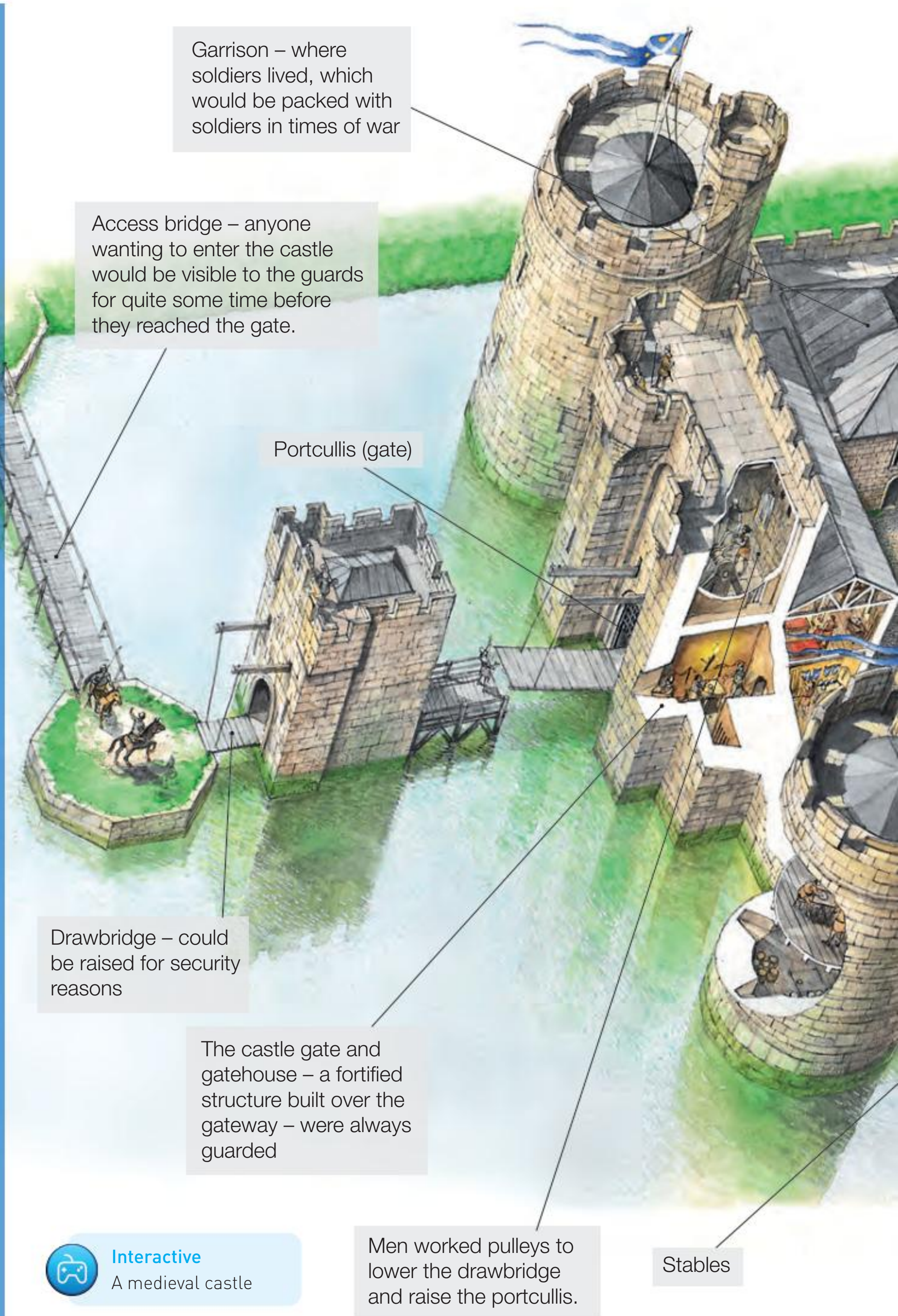
10.7 The medieval castle

In this topic, you will:

- » extend your understanding of daily life by examining the medieval castle
- » understand the terminology associated with medieval castles.

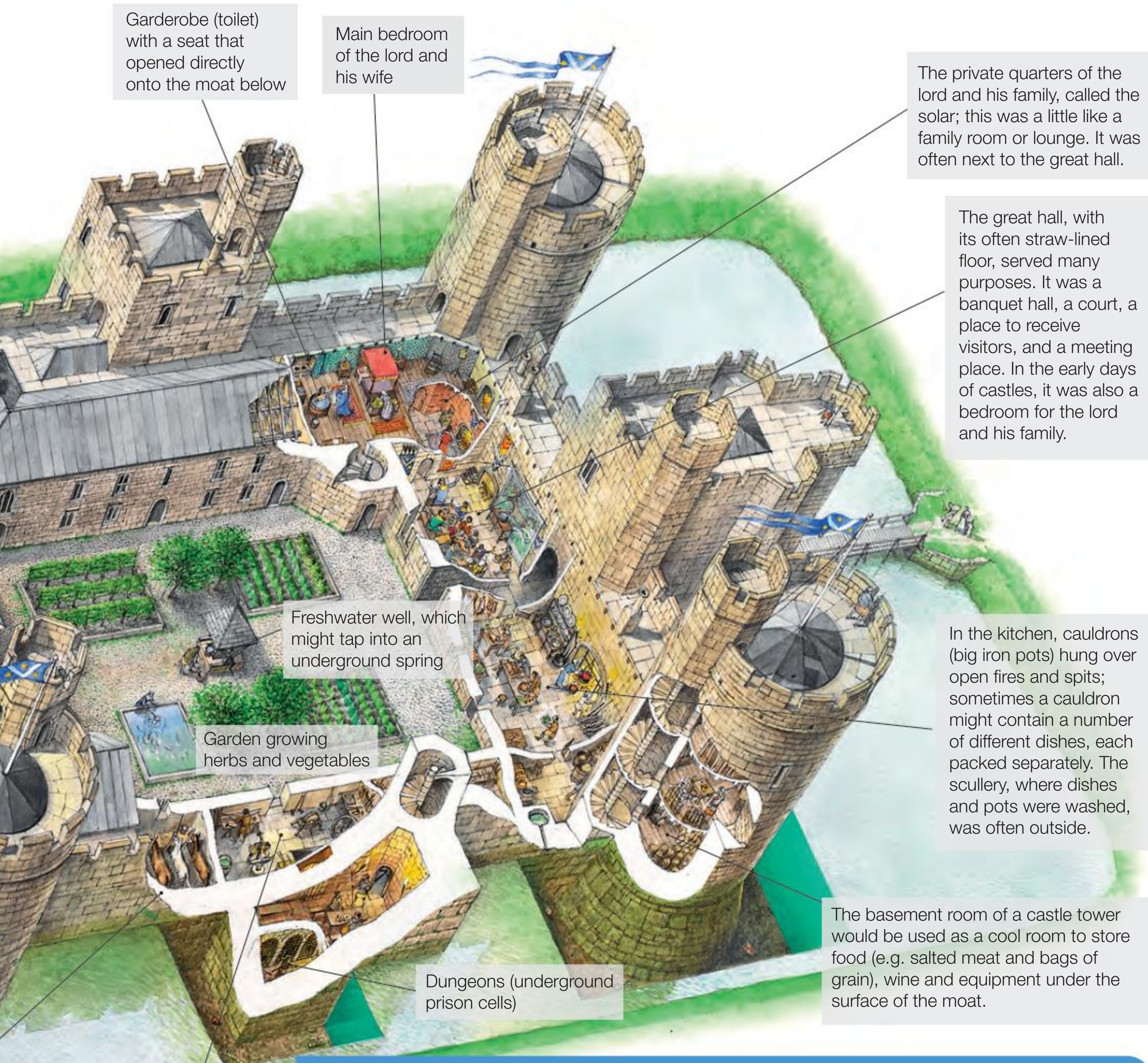
The richest and most powerful families in medieval Europe lived in castles that were scattered across the countryside. Within the castle walls lived not just the extended family, but a whole community able to serve all the needs of the family. A typical day in the castle began when the sun rose.

By then, servants were already preparing meals and had lit the fires in the kitchen and great hall. In times of peace, castles were the settings for feasts, workshops, markets, romance, raising and entertaining children, crafts and music. They were also the focal point for military training, the day-to-day running of the realm, and administering justice. The medieval period saw the development of some distinct castle designs; these are covered in topic 10.13 on page 297.



Interactive
A medieval castle

Source 17 A modern artist's impression of 'home sweet home' for many wealthy and powerful families in medieval Europe



10.7 CHECK YOUR LEARNING

Review and understand

1 In your own words, **define** the following terms: garderobe, solar, garrison, portcullis, cauldron, scullery, spit and dungeon.

2 **List** some of the typical activities and events that took place in medieval castles.

Evaluate and create

3 Work with a partner to **create** a short role-play about a typical day in the life of one of the following:
- a wealthy family member living in a castle
- a servant working in the castle; for example, as a cook, stable boy or gardener.

10A RICH TASK

Quizlet

Revise the key terms you have learnt so far.

The achievements of medieval women

In medieval Europe, both noble and peasant women were expected to work in the family home until they were married. After marriage, they had to run their husband's household and raise children. Typically, they received very little education and had few rights. Every woman was required to obey her father or husband in all matters and was not able to make decisions for herself.

Despite these challenges and restrictions, some women in medieval Europe became very influential and their stories live on to this day.

Source 18 An artist's impression of Eleanor of Aquitaine knighting a soldier

Eleanor of Aquitaine (1122–1204)

Eleanor was born in France in 1122. She was the daughter of the Duke of Aquitaine and heir to his land. When her father died, however, the land became the property of Louis VI, the French king. When she was 15, Eleanor married the king's son. He later became King Louis VII, and Eleanor became Queen of France. She took part in the Second Crusade (Holy War) alongside her husband, taking 300 women with her to fight and help care for the wounded.

Eleanor was unhappy with Louis, and the marriage was annulled (declared non-existent) in 1152. In 1154 she married the Duke of Normandy, who later became King Henry II of England.

Eleanor supported her sons when they revolted against Henry in 1173, and she was imprisoned for 16 years. When Henry died in 1189 she was released, and helped rule England with – and for – her eldest son, King Richard I, known as Richard the Lionheart.

Source 19 A nineteenth-century artist's impression of Joan of Arc

Joan of Arc (1412–1431)

Joan of Arc was born in 1412 in a small French village called Domrémy. As the daughter of a peasant farmer, she received no education apart from the lessons of the Church. When she was 13, Joan believed she began to see visions and hear the voices of saints. The voices told her that she would help the French defeat the English – who sought to put an Englishman on the French throne – and so secure the coronation of Charles VII, who was then crown prince of France.

Aged 18, Joan travelled in men's clothing to see Charles. Her faith inspired many nobles and common people. She helped lead the French to victory, and in 1429 Charles was crowned King Charles VII of France.

Less than a year later, Joan was captured and imprisoned by the English. Wanting to discredit the new French king, they accused her of heresy (that is, of doing something in serious conflict with the teachings of the Church). Because she refused to confess that she did not hear the voices of saints she was burned at the stake in 1431.

Christine de Pizan (1363–*c.* 1430)

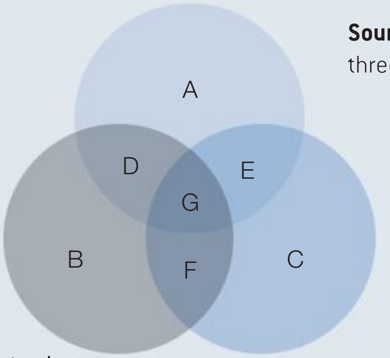
Christine de Pizan was born in Venice in 1363. Her father was Tomasso de Pizzano, a respected physician who made sure she received a good education. She grew up at the court of King Charles V of France.

At 14, Christine married Etienne du Castel, a court secretary, and they had three children. Her husband died in 1389. By this time, her father and King Charles were also dead, and Christine decided to support her family by writing. Over the next 50 years, she wrote many poems, essays and books. As well as entertaining stories and love poems, she wrote serious works about the place of women in society, defending women against those who dismissed them as ignorant and worthless.

Source 20 A nineteenth-century artist's impression of Christine de Pizan

KEY SKILL
Analysing sources

Using Venn diagrams to compare information from a range of sources



Source 21 A Venn diagram comparing three things

Venn diagrams are simple diagrammatic tools that help you organise your thinking. They can help you to quickly identify the similarities and differences between two or more things. These 'things' can be anything – people, events, political systems and so on. Venn diagrams are a useful tool to compare information you have gathered from a range of sources.

To complete a Venn diagram comparing three things, like the one in Source 21, follow these steps:

Step 1 Think about how each of the three things you are comparing are different. Record these individual features in the non-overlapping sections (A, B and C).

Step 2 Then think about how two of the things are similar or share common features. Write any features that are common to A and B in section D, features common to A and C in section E, and features common to B and C in section F.

Step 3 Finally, think about the features that all three things have in common. Record these common features in section G.

For more information on this key skill, refer to page 213 of 'The history toolkit'.

Practise the skill

1 **Construct** a large Venn diagram – like the one in Source 21 – in your notebook, and arrange features from the written information and visual sources about the three women discussed in this rich task to show what they had in common and what was different about them.

Consider the following topics:

- family connections
- education
- type and extent of influence.

Extend your understanding

1 Consider the place of women in Australian society today. Create a table to **compare** the ways in which women's social positions are similar to and different from the social positions of women in medieval Europe.

Investigate the following areas using the internet:

- home life
- legal rights
- family
- work and roles performed
- access to education.

2 Which do you think is the most effective way to compare information: Venn diagrams or tables? **Explain** your answer.

10.8 A period of great change

In this topic, you will:

» outline changes in medieval Europe as new empires, kingdoms and rulers asserted their power.

Danelaw
an area in north-west England that the then King of Wessex, Alfred, gave to the Vikings in exchange for their stopping raids of the region

Anglo-Saxon
a Germanic people who settled in Britain in the 400s CE; they drove the local Celtic people to the land's extremities

The medieval period in Europe was a time of great change. New groups of people moved across the region and settled in different places; new ideas and beliefs spread throughout the population; and important events such as wars, famines and plagues brought about changes at all levels of society.

Throughout this period, new empires, kingdoms and rulers were also established. Some of these are outlined in Source 1.

Source 1 Empires, kingdoms and rulers in medieval Europe

THE FRANKS (EIGHTH AND NINTH CENTURIES CE)

- dominated Western Europe (modern-day France, Belgium and Germany)
- commanded a powerful military force
- had a close relationship with the Catholic Church.
- brought stability to the region by uniting many tribal groups under Christianity to form the Holy Roman Empire
- were most powerful under Charles I (742–814 CE), also known as Charlemagne (pictured; and see topic 10.9).

THE VIKINGS (NINTH AND TENTH CENTURIES CE)

- raided coastal settlements and monasteries in England, Ireland, Scotland and France in the ninth century CE
- came to control large areas of medieval Europe over time, setting up their own kingdoms (such as the *Danelaw* in England)
- under leadership of Viking leader Hrolf (pictured) defeated the Frankish king, Charles the Simple (a descendant of Charlemagne) in 911 CE. Hrolf forced Charles to pay a fief of a region of western France. This area became known as Normandy. In return for this land, Hrolf promised to stop raiding and convert to Christianity.

THE NORMANS (TENTH AND ELEVENTH CENTURIES CE)

- adopted and advanced some of the political and cultural practices of the Franks
- made further conquests in Europe and established a kingdom in southern Italy by the eleventh century BCE
- had long-standing interests in England. For example, Emma of Normandy (the sister of Richard II, Duke of Normandy) had married the English King Ethelred II. Their son, Edward the Confessor (pictured), became King of England in 1042. During his reign, many Normans became involved in English politics. From 1066, the Normans ruled England, ending the Anglo-Saxon period.

Battle of Hastings

When Edward the Confessor died without an heir in 1066, a number of people believed they had the right to rule England. One contender was Harold Godwinson, the powerful Earl of Wessex, who had himself crowned king that year. Harold claimed that Edward had promised him the throne on his deathbed.

Edward's cousin William, Duke of Normandy, was another contender for the throne. He also claimed that Edward had promised him the throne on his deathbed. Later that year, he invaded England to take the throne for himself. William's army defeated Harold's army at the Battle of Hastings.

The Battle of Hastings is one of the most significant battles in medieval Europe. It took place at Hastings in the south of England on 14 October 1066.

The forces of Harold, the newly crowned King of England, and William, Duke of Normandy, fought for the English throne. Harold was killed when he was shot in the eye with an arrow. William – who became known as William the Conqueror – was then crowned King William I of England.

This marked an end to Anglo-Saxon rule and the start of Norman rule in England. Norman rule changed England forever. There were changes to the government, the Church, language and everyday life.

From 1066, William and his Norman nobles began imposing their rule on the English. Many of the former Anglo-Saxon nobility fled to Denmark, Scotland and Wales. William claimed their lands, giving some to the Church and some as fiefs to his loyal followers and knights as a reward.

The Normans built castles in their new kingdom to protect their territory and enforce their rule. They also introduced the system of feudalism, which was already common across mainland Europe.

Source 2 A scene from the Bayeux Tapestry (an embroidery retelling of the Battle of Hastings, made in around 1080) showing the mounted soldiers of William, Duke of Normandy, attacking the Saxon foot soldiers of King Harold.

Key skill worksheet
Identifying continuity & change: Change in medieval Europe

Worksheet
Evidence of 1066

10.8 CHECK YOUR LEARNING

Review and understand

1 **Identify** one significant achievement of the Franks.

2 Who was Hrolf? Why was he an important leader?

Apply and analyse

3 **Explain** why this period in medieval Europe was a time of great political change. Use specific examples from this topic to support your answer.

4 **Summarise** why Harold Godwinson and William of Normandy both believed they were legitimate contenders for the English throne in 1066.

5 **Analyse** the significance of the Battle of Hastings using the 5Rs of historical significance (see page 212 of 'The history toolkit').

Evaluate and create

6 The Bayeux Tapestry is a rich source of information about the Battle of Hastings. Collect images of the tapestry from the internet, and use them to **construct** a flow chart showing the major events in the Norman invasion of England (including the Battle of Hastings). (Hint: Most websites that show the full tapestry will provide commentary about what is happening in each panel.)

10.9 Significant individual: Charlemagne

In this topic, you will:

» understand why Charlemagne was a significant figure in medieval Europe.

Charles I (742–814 CE), King of the Franks – more commonly known as Charlemagne (meaning Charles the Great) – was one of the most important kings in medieval Europe. He was part of the noble Carolingian Dynasty. Charlemagne and his brother Carloman both took the throne of the Frankish kingdom when their father, Pepin the Short, died in 768. After Carloman's death in 771, Charlemagne ruled in his own right.

Charlemagne was active in overseeing his kingdom, and regularly travelled around it. He also set up a network of messengers to report back to him on what was happening. Under his rule, his kingdom rose to dominate Western Europe (see Source 3).

Leadership qualities

Over the course of his lifetime, Charlemagne fought many wars, and his victories expanded the territory under his control. He was helped by the armies of his supporters. Charlemagne had given many of these men grants of land, which encouraged their ongoing loyalty and support.

Charlemagne was also a leading thinker, introducing many political and social reforms. To encourage education, he set up a number of schools for nobles and peasants alike. Many of the cultural and artistic traditions of the Greek and Roman Empires were brought back to life during Charlemagne's rule. As a result, this period is often referred to as the 'Carolingian Renaissance' (from the French term meaning 'rebirth'). Charlemagne's leadership encouraged many new developments in literature, architecture and the arts.

EUROPE, *C.* 800 CE

Source: Oxford University Press

Source 3 This map shows the extent of the Frankish Empire under Charlemagne, *c.* 800 CE, when it was at its largest.

Charlemagne becomes an emperor

Charlemagne had always had a close relationship with the Catholic Church. In 799 CE, he came to the aid of Pope Leo III.

The Pope, accused of adultery, had fled Rome. His accusers had threatened to gouge out his eyes and cut out his tongue. Charlemagne escorted the Pope back to Rome and forced his reinstatement.

The Pope was understandably grateful to Charlemagne. On Christmas Day in 800, he crowned Charlemagne Emperor of the Romans. This endorsement strengthened both the Church and the empire. Rulers who followed Charlemagne were referred to as Holy Roman Emperors.

In late 813, Charlemagne crowned his son, Louis the Pious, co-emperor. Shortly afterwards, on 28 January 814, Charlemagne died. He had ruled for 47 years.

Analysing perspectives on Charlemagne

Understanding perspectives gives insight into what a person values or prioritises in their life.

Look closely at Source 4. The annotations will help you interpret this source. What do you think Source 4 says about perspectives on Charlemagne?

For more information on this key skill, refer to page 213 of 'The history toolkit'.

Practise the skill

Log onto your obook pro and complete the key skill 'Analysing sources: Perspectives on Charlemagne'.

KEY SKILL
Analysing sources

Key skill worksheet
Analysing sources: Analysing perspectives on Charlemagne

Charlemagne's position in this painting is front and centre. He draws our attention and is positioned as the most important person in the image.

Other people in the image are standing behind him. They have also been painted as being smaller than him. This one is bowing in respect.

The background scenery – with high walls, statues and windows – indicates an important event.

Charlemagne's upright posture and dress show his regal status, especially the gold trimmings on his clothing.

The placement of Charlemagne's hands on these children suggests a gentle, fatherly quality.

Source 4 An artist's impression of Charlemagne, who is pictured with children

10.9 CHECK YOUR LEARNING

Review and understand

1 Study Source 3. Using the map at the back of this book, **identify** which modern European countries were originally ruled by Charlemagne.

Analyse and apply

2 **Explain** how giving grants of land to his closest supporters benefited Charlemagne.

3 **Suggest** why the Pope decided to crown Charlemagne Emperor of the Romans.

Evaluate and create

4 **Discuss** three reasons why you think Charlemagne deserves to be considered a significant individual. Structure your answer in order of most important to least important.

10.10 The spread of Christianity

In this topic, you will:

» understand the dominance of the Catholic Church over medieval society

» explore the cause and effects of the Crusades.

Christianity became a very powerful and wealthy institution during medieval Europe. The Catholic Church (now referred to as the Roman Catholic Church) showed its dominance over many aspects of life, including the arts, medicine, education, architecture and even in wars.

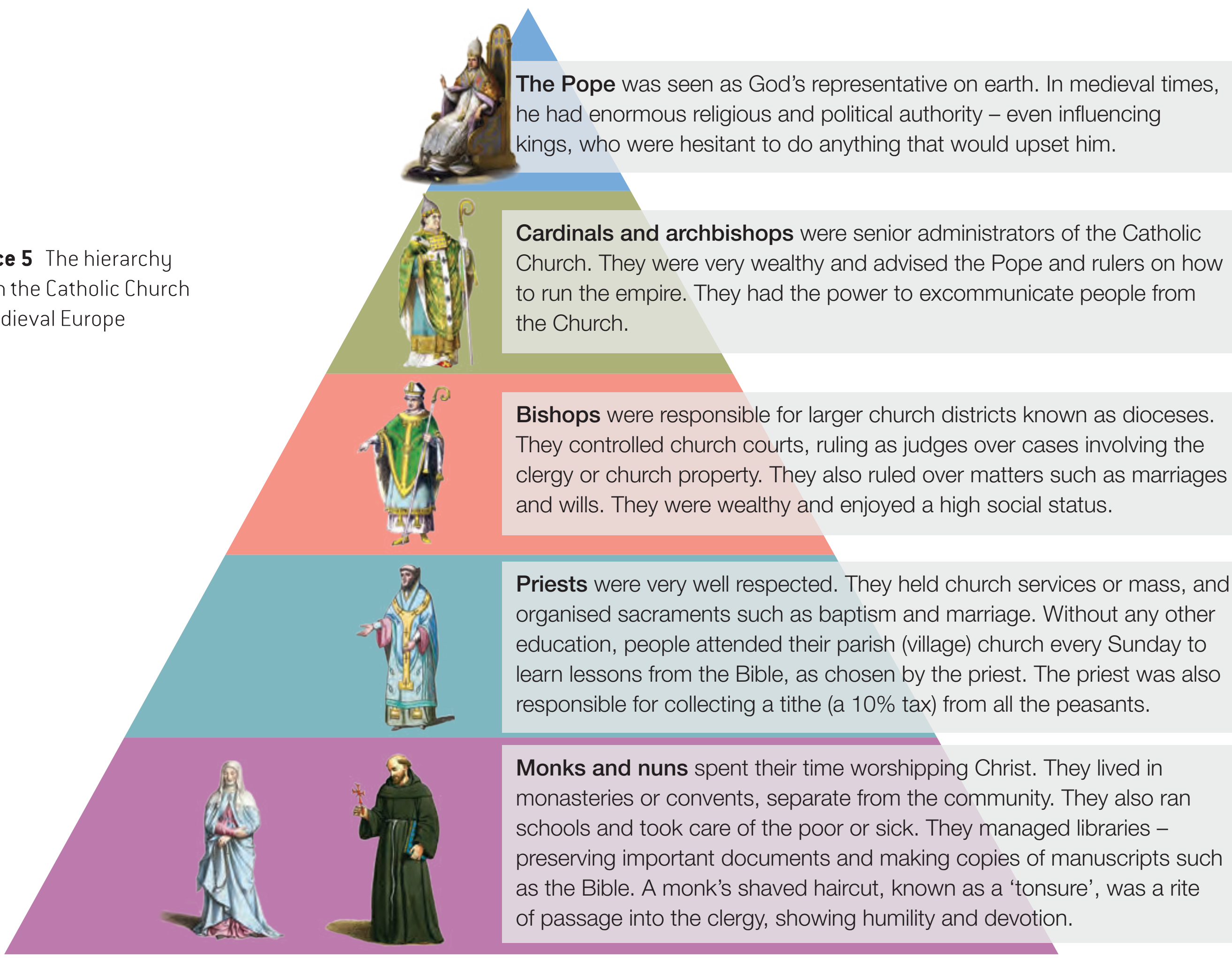
This powerful institution was headed by the Pope, who in many respects had more power than any ruler in medieval Europe. He was supported by a hierarchy of **clergy** (see Source 5). The clergy organised and advised society at all levels. Similar to feudalism, a person's rank within the clergy was determined by their family.

clergy
the priests or ministers of a religion, especially the Christian Church

mass
an act of worship in the Catholic Church

Christianity's influence over daily life

In a feudal society, people's lives typically revolved around the activities of the village or town church. Christians followed the guidance of the Catholic Church from birth to death, and attended **mass** every Sunday. They learnt from childhood how the Church expected them to behave and what they should believe. Obeying the Church's teachings helped to preserve the social order in medieval Europe, as it brought unity and stability. The Church also established religious festivals and holy days within the calendar for people to set aside to worship or honour saints.



Source 5 The hierarchy within the Catholic Church in medieval Europe

Heaven and hell

During medieval times, it was believed that a person's level of faith and devotion would impact their time both on Earth and in the afterlife. The act of paying penance, usually by a gift of money or food, was frequently required for a person to be forgiven for their sins. Following the rules of the Church would grant a person salvation (entry into heaven). The desire to enter heaven and the terrible fear of hell were strong motivations for people in medieval times to obey church rules.

Any Christian who did not follow the rules could be **excommunicated** by a bishop or the Pope. Being expelled from the Church was a terrifying punishment, as it meant a person could no longer attend church or receive sacraments (sacred rituals). Most importantly, it meant their soul was doomed to live in hell for eternity. Highly decorated illuminated manuscripts (see page 291) and illustrations portrayed in great detail the endless punishment and torture a sinner would experience in hell.

Source 6 *Hell*, an illustration created by Herrad of Landsberg in 1180; it has a border of rocks as hell was believed to be located under the Earth.

Holy pilgrimages

As Christianity spread across Western Europe, people of all social classes began to set out on journeys to places of religious importance (such as shrines and burial sites). These journeys, known as pilgrimages, were designed to prove Christians' loyal devotion to God. Each region of Europe had its own sites popular with pilgrims; however, the most sacred pilgrimage site for all Christians was the city of Jerusalem, in the Holy Land.

The Holy Land had been held by Muslim Arabs since 637 CE, but Christian pilgrims had been allowed to travel there freely. This changed in 1050, when a group known as the Seljuk Turks, who had recently converted to Islam, took control of Jerusalem. They began harassing pilgrims and refusing them entry to the city. These events led to the start of a series of religious wars known as the Crusades.

Source 7 An artist's impression of Christian pilgrims travelling to a shrine at Canterbury Cathedral in England

Religious warfare – the Crusades

The Crusades were a series of religious wars between Christians and Muslims between 1096 and 1270 CE to gain control over key religious sites in and around the city of Jerusalem – an important spiritual and religious location for believers of both Christianity and Islam. Historians argue about the total number of wars that were fought, but most agree that eight major crusades took place (see Source 8). While initially the journey to the Holy Land was over land, subsequent crusades started to travel both over land and through the Mediterranean Sea (see Source 9).

excommunicated
being cut off from the church community (including participation in communion and confession); a religious punishment

The start of the Crusades

Following the takeover of Jerusalem by the Seljuk Turks in 1050 CE, Christian pilgrims and traders no longer felt safe in the region. Many believed that this new Islamic regime would also move to invade Constantinople, capital of the Byzantine Empire (formerly the Eastern Roman Empire), which was under Christian rule.

Watch it!
A video and quiz on The Crusaders

Source 8 The dates of the eight major Crusades

Date	Crusade
1096–1099	First Crusade
1147–1149	Second Crusade
1188–1192	Third Crusade
1202–1204	Fourth Crusade
1217–1222	Fifth Crusade
1228–1229	Sixth Crusade
1248–1254	Seventh Crusade
1270	Eighth Crusade

Key skill worksheet
Sequencing events: The Crusades

Key skill worksheet
Analysing cause & effect: The Crusades

This growing threat caused the Byzantine emperor to ask for support from Pope Urban II in 1096. In response, the Pope rallied Christians all over Europe to fight for control of Jerusalem and to help defend other Christians in the Middle East against the Turkish invaders. This was the start of the First Crusade.

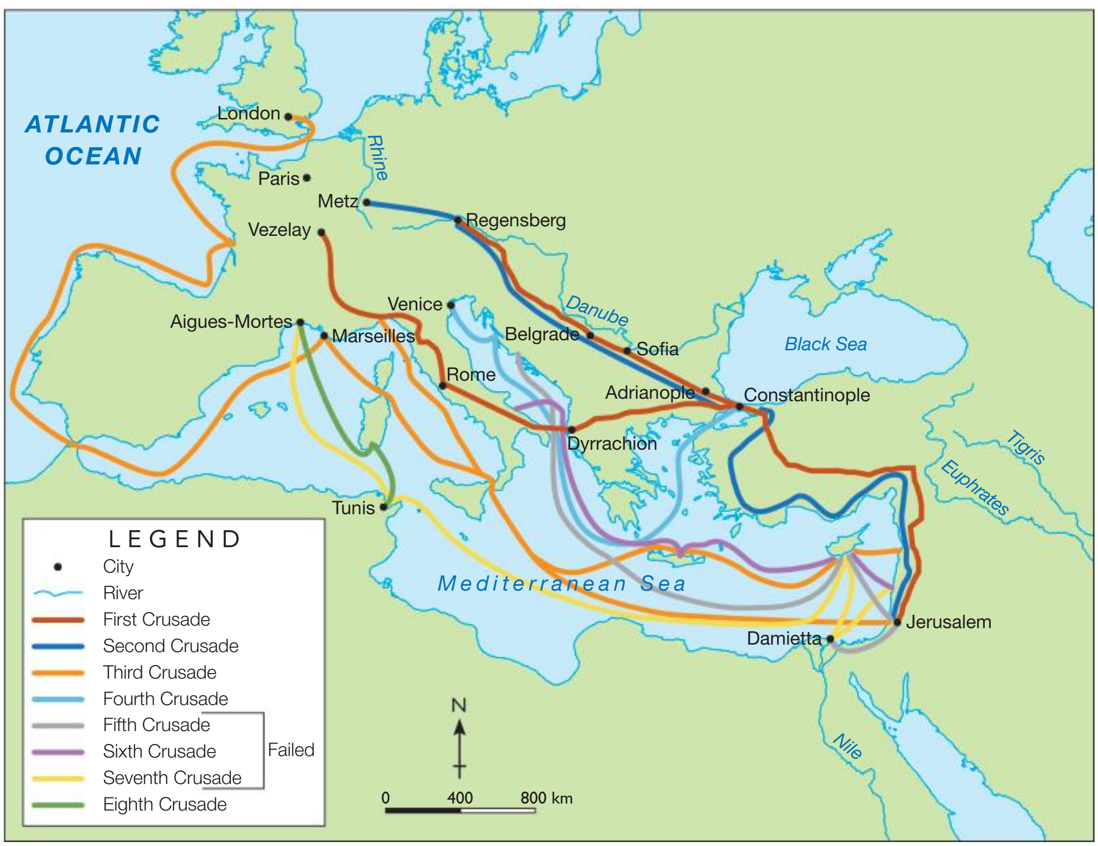
People from all walks of life – from kings to peasants – joined the Crusades. Young people were particularly caught up in the desire to fight in the name of Christianity. Many young peasants who took part in the Crusades were encouraged by their local parish priests to join the fight. The priests believed that young people, free from 'sin', would make more successful Crusaders than older people. St Bernard of Clairvaux wrote in 1140: 'Of mighty soldier, oh man of war, you now have something to fight for. If you win it will be glorious. If you die fighting for Jerusalem, you will win a place in heaven.'

Although most people joined the Crusades to return control of the Holy Land to Christians, many went for other reasons. During this deeply religious time, most Christians believed that taking part in the Crusades would be a sure way of gaining entry into heaven when they died. Some were hoping to find wealth and fame. Others were looking for adventure.

The effects of the Crusades

The first Crusade in 1096 successfully brought Jerusalem under Christian control. The Crusaders ruled the city under Christianity until 1187. All the remaining Crusades were either designed to protect the gains made during the First Crusade or motivated by a desire for wealth and fame.

THE ROUTES OF THE CRUSADES



Source 9 Source: Oxford University Press

The Crusades had enormous effects on Europe and its people, including:

- the spread of new ideas, customs and products (such as food, spices and perfumes) as Crusaders returned home
- increased trade between the West and the East, as items from the **Silk Road** were found at the Holy Land and poured into Europe through trading ports in Italy
- the desire to explore and discover new ideas, which generated greater knowledge of science, medicine, mathematics and architecture.

The Crusades were also responsible for weakening the system of feudalism that had dominated Europe for centuries. Many lords had mortgaged or sold their estates before heading off on Crusades, and many more never returned at all.

All of these changes led to a move from a land-based economy to a money-based economy. They contributed to increased commerce in towns – causing them to grow into cities.

Source 10 An artist's impression of a battle during the First Crusade, painted in 1490

It is important to recognise the negative effects of the Crusades. Thousands of lives were lost in bloody battles (see Source 10), especially during the Siege of Jerusalem in 1099. One Christian **chronicle** reported after the First Crusade: 'The slaughter was so great that our men waded in blood up to their ankles.' Many soldiers died of injuries or disease, and others were sold as slaves, never to return home.

Silk Road
a network of trade routes stretching west from China to the Mediterranean Sea; it was the main means by which silk was introduced to the West

chronicle
a detailed narrative on an event

10.10 CHECK YOUR LEARNING

Review and understand

1 In your own words, **define** a pilgrimage.

2 **Identify** the event that caused Pope Urban II to call for people to go on the First Crusade.

Apply and analyse

3 **Summarise** the influence of the Church on medieval Europe. Consider the influence of the Church on social, economic and political parts of life.

4 **Analyse** Source 6. What features of this image would cause the viewer to fear hell? What were some positives and negatives of medieval people fearing hell?

5 Look closely at Source 9. **Explain** how the journey changed with each crusade.

Evaluate and create

6 In pairs, **create** a role-play or a comic strip that portrays a scenario. Use empathy (refer to page 213 of 'The history toolkit)' to get into the minds of your characters. Some options include:
   - the daily life of a parish priest or a monk
   - a person who wants their sins forgiven
   - a peasant who decides to take part in the Crusades.

7 Hold a class discussion about the Crusades. Use the following prompts to get started:
   - Were the Crusades justified wars or vicious and embarrassing wars?
   - Were the Crusades worthwhile to medieval Europe or were they a waste of resources?

10B RICH TASK

Quizlet

Revise the key terms you have learnt so far.

King Richard III

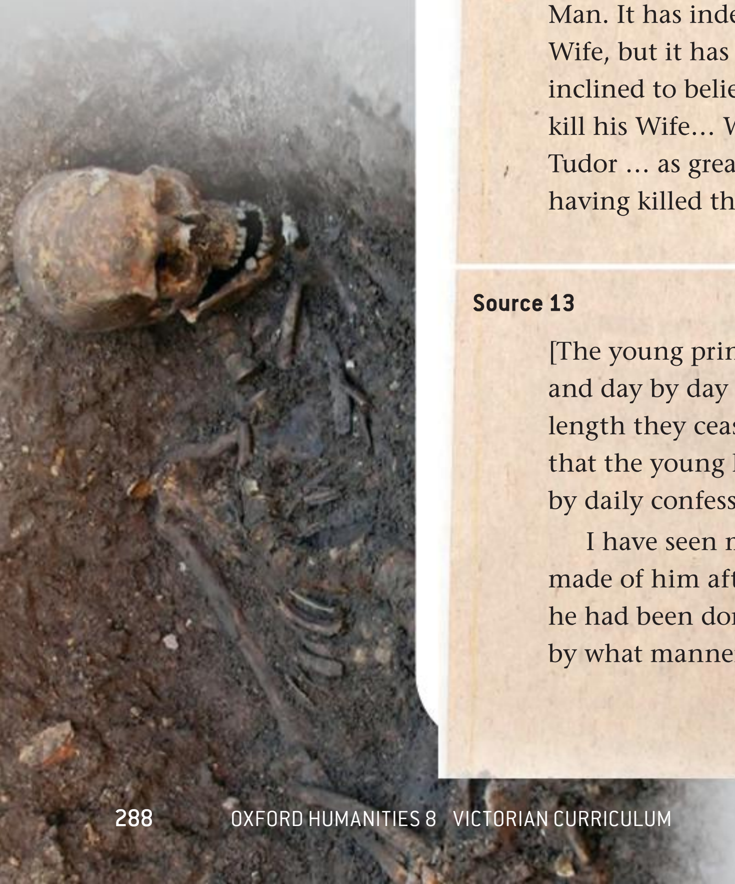
Richard III was King of England from 1483 to 1485 CE. His family, the House of York, had ruled England since 1327. Richard took the throne after his brother, King Edward IV, died.

Edward's two young sons were actually next in line for the throne. Richard was nominated regent, meaning he was to rule until the young princes came of age. Within weeks, however, the young princes were imprisoned in the Tower of London and never seen again. Rumours spread quickly that Richard had organised for them both to be murdered.

Almost 200 years later, in 1674, construction works at the Tower of London led to the discovery of a chest containing two skeletons believed to be the remains of the princes. They were reburied in Westminster Abbey.

In April 2012, a major archaeological discovery occurred when Richard's skeleton was found buried under a carpark in Leicester. It had been buried after he died in battle on 22 August 1485 from a fatal blow to the head. The exact location was unknown, requiring extensive historical research. With access to Richard's bones, a DNA test could possibly confirm whether there is a genetic match to his nephews' bones, and solve this 550-year-old murder mystery. However, at this stage the Queen and Westminster Abbey do not want the fragile remains to be disturbed.

There are many sources that put forward their opinion of Richard III. One of the most famous is William Shakespeare's play *Richard III*, where Richard is portrayed as a villain who definitely killed his nephews (see Source 14).



Source 11 The skeleton of King Richard III showing the curvature of his spine; the discovery was referred to as 'the king in the carpark'. The death of King Richard III signified the end of the House of York dynasty.

Source 12

The Character of this Prince [Richard III] has been in general very severely treated by Historians, but as he was York, I am rather inclined to suppose him a very respectable Man. It has indeed been confidently asserted that he killed his two Nephews & his Wife, but it has also been declared that he did not kill his two Nephews, which I am inclined to believe true; & if this is the case, it may also be affirmed that he did not kill his Wife… Whether innocent or guilty, he did not reign long in peace, for Henry Tudor … as great a Villain as ever lived, made a great fuss about getting the Crown & having killed the King at the battle of Bosworth, he succeeded to it.

Extract from Jane Austen, *Juvenilia*, 1791; written when she was 16 years old

Source 13

[The young princes] were withdrawn into the inner apartments of the Tower proper, and day by day began to be seen more rarely behind the bars and windows, til at length they ceased to appear altogether. The Physician John Argentine … reported that the young kin, like a victim prepared for sacrifice, sought remission of his sins by daily confession and penance, because he believed that death was facing him …

I have seen many men burst into tears and lamentations when mention was made of him after his removal from men's sight; and already there is a suspicion that he had been done away with. Whether, However, he has been done away with, and by what manner of death, so far I have not yet at all discovered.

Extract from Dominic Mancini, The Usurpation of Richard III, December 1483; Mancini was an Italian who visited England in 1482–83 and witnessed events leading up to the coronation of Richard III.

Source 14

Have no delight to pass away the time, Unless to see my shadow in the sun And descant on mine own deformity. And therefore, since I cannot prove a lover, To entertain these fair well-spoken days, I am determined to prove a villain And hate the idle pleasures of these days.

Nay, do not pause; for I did kill King Henry— But 'twas thy beauty that provoked me. Nay, now dispatch; 'twas I that stabbed young Edward— But 'twas thy heavenly face that set me on.

Extracts from William Shakespeare, *Richard III*, 1592

KEY SKILL
Analysing sources

Drawing conclusions about the usefulness of sources

A useful source will add to your understanding of a historical period or event. The source needs to be reliable, and relevant to your research or inquiry. Ask yourself the following questions to determine the usefulness of a source:

- What type of source is it?
- Who created the source?
- Why was it created?
- Is it balanced or does it present only one point of view?
- Is it based on fact or opinion?
- Is there enough information and detail for the source to be of use to my research or inquiry?
- Does the information support and reinforce evidence from other sources?

For more information on this key skill, refer to page 213 of 'The history toolkit'.

Practise the skill

When examining a range of different sources, it is often helpful to gather your information into a table.

1 Copy the table below into your notebook and complete rows for Sources 12 to 14.

2 **Compare** the sources. In what ways are the three sources similar? In what ways are they different?

3 Based on your findings, which of the three sources do you think is the most useful? **Justify** (give reasons for) your answer.

Extend your understanding

1 Conduct further **research** into King Richard III. As a class, hold a Socratic circle dialogue to discuss the following questions:
   - What is more important – possibly solving a murder or allowing a person's remains to rest in peace?
   - Is Richard guilty or not guilty of killing the princes in the tower?
   - Did Shakespeare tarnish Richard's reputation or was his portrayal accurate?

Worksheet
Socratic circle dialogue

Source number	Source type (primary/ secondary)	Date of creation	Who created the source?	Key questions to determine the usefulness of the source • Why was it created? • Is it balanced or does it present only one point of view? • Is it based on fact or opinion? • Is there enough information and detail for the source to be of use to my research or inquiry? • Does the information support and reinforce evidence from other sources?

10.11 Cultural developments in medieval Europe

In this topic, you will:

» recognise some of the significant developments in architecture, literature and music during the medieval period.

The medieval period in Europe lasted for about 1000 years. Over this time, there were many important developments that affected people's lives. Some were cultural (such as architecture, literature and music), some were social (such as law and commerce), and others were technological (such as weapons and warfare). These developments will be discussed over the course of this topic and topics 10.12 to 10.14.

Architecture

Architecture is a lasting example of the significant developments made in medieval Europe. Most European towns and cities settled during the medieval period still have buildings that date back almost 1000 years. These buildings include churches, monasteries, town halls, castles and cathedrals.

KEY CONCEPT
Significance

Source 2 Notre Dame in flames, April 2019 – the iconic spire collapsed just moments later.

Notre Dame

A major development in medieval architecture was the Gothic style. It originated in France during the twelfth century and became popular throughout Europe until the sixteenth century. The most famous example of Gothic architecture is the cathedral of Notre Dame in Paris. Construction began in 1163 CE and took almost 200 years to complete. Its interior is 130 metres long and 115 metres high. Notre Dame includes many staples of gothic architecture, such as stained glass windows, pointed arches, tall spires, ornate decorative stonemasonry – for example, statues and gargoyles – and flying buttresses.

In April 2019, fire ravaged Notre Dame's roof and damaged many 800-year-old relics. Its iconic spire collapsed. French President Emmanuel Macron captured its significance:

Source 1

> Notre Dame is our history, it's our literature, it's our imagery. It's the place where we live our greatest moments, from wars to pandemics to liberations. This history is ours. And it burns. It burns and I know the sadness so many of our fellow French feel.
>
> Quote from Emmanuel Macron, 2019

For more information on this key concept, refer to page 201 of 'The history toolkit'.

Literature

Few people in medieval Europe could read or write. Those who could were often members of the clergy. All documents were written by hand until very late in the medieval period. This was a time-consuming process, with books taking years to produce.

Most medieval manuscripts related to religion, such as copies of the Christian Bible and prayer books.

Analyse this!
Illuminated manuscripts

It was rare for the common people to write anything, even diaries or letters. This means that our knowledge of how the poor lived in medieval Europe is greatly limited.

Illuminated manuscripts

Some medieval manuscripts were ornate works of art, known as illuminated manuscripts. They featured highly detailed illustrations decorated with gold and silver, often depicting scenes related to the text. The elaborate borders and grotesque art provided images for those who could not read.

Illuminated manuscripts were very expensive to make, with many materials and craftspeople needed to create them. They were generally written and illustrated on parchment or on vellum (a material made from the skin of sheep, goats or calves). Paints were made from charcoal, plants, ground-up semi-precious stones and spices to give them vibrancy – or sometimes even urine and ear wax!

Source 3 A page from an illuminated manuscript created in the fifteenth century, which records the New Testament Gospel of John

The invention of the printing press

When the printing press was invented in Germany by Johannes Gutenberg in around 1450, it revolutionised reading and writing across Europe. Books became quicker and cheaper to produce, which made them more readily available to common people. This increased the number of people who could read and write, and also meant that the Church no longer had control over the types of books that people could read.

Music

Music played an important role in medieval life. It marked the end of harvests, provided entertainment for people at all levels of society, and was an important part of religious life.

Most sources of music that survive are from formal settings, such as Gregorian chants. These smooth and slow melodic tunes became customary across all Catholic churches in medieval Europe. They were sung by a choir in unison, without any instruments. Gregorian chants led to the earliest notation system for writing down music using a set of parallel lines (a stave) and various dots and squiggles similar to the musical notes used today.

Source 4 An example of a Gregorian chant written in a hymn book from the fourteenth century

10.11 CHECK YOUR LEARNING

Review and understand

1 **Identify** three areas of medieval life in which music was important.

Apply and analyse

2 **Suggest** why our knowledge of how common people lived in medieval Europe is limited.

3 **Analyse** the significance of the printing press using the 5Rs of historical significance (see page 212 of 'The history toolkit').

4 **Explain** what an illuminated manuscript is. List some of the materials used when creating illuminated manuscripts.

Evaluate and create

5 **Research** the Gothic architectural features of Notre Dame. Create a collage or poster using images of the cathedral. Annotate the various features to show your understanding of this form of architecture.

10.12 Developments in crime and punishment

In this topic, you will:

» explain the ways in which the nature of crime and punishment stayed the same or changed over time in medieval Europe.

Punishments for crimes were very harsh in medieval Europe. The ruling classes believed that common people would only learn how to behave properly by fearing what would happen to them if they broke the law. Even the smallest offences had serious punishments.

Who enforced the law?

Unlike today, there was no police force in medieval Europe. Maintaining order was a community responsibility. This was done in a few different ways:

- It was the duty of all members of a village or town to catch criminals. If a person witnessed a crime, they were to 'raise the hue and cry'; that is, they were to cry out so that any able-bodied men in the area could come rushing forward and stop the criminal from fleeing.
- All villagers or townspeople aged over 12 were grouped into a 'tithing' of 10 members. They had a shared responsibility. If one of them broke a law, the rest of the tithing was responsible for making sure the criminal among them attended court. Otherwise, all 10 of them would face the same punishment.
- A group of watchmen walked the streets at night, especially around taverns, to look out for criminal or drunken behaviour. If they witnessed criminal behaviour, they would raise the hue and cry.
- One man from the village or town was chosen to be the 'petty constable'. This meant he took on extra responsibility to enforce the law. The petty constables did this without any pay, weapons, training or uniform. Therefore they were often reluctant to work very hard.

Source 5 This medieval engraving shows a woman wearing a 'scold's bridle' being paraded through the streets by her husband. While wearing the mask, it was impossible to speak. Some scold's bridles had bells to draw even more attention to the woman.

Courts and trials

When a crime was committed, different courts dealt with different types of offences. Generally, punishments occurred in public, usually in the village square. This was designed to deter others from committing crimes. It also humiliated the offender. Minor matters, such as a woman gossiping or nagging her husband, were heard by village courts. If found guilty, such a woman – known as a scold – would be forced to wear a 'scold's bridle' or sit on a ducking stool and be dunked in water (see Sources 5 and 6). More serious matters, such as a peasant's son being educated without the lord's permission, were heard by manor courts. If found guilty, a peasant might be fined or put in the stocks or a pillory.

Source 6 An artist's impression of the ducking stool commonly used for women accused of gossiping

The most serious charges were dealt with in Church courts (for charges such as **heresy** and witchcraft) and the King's Court (for charges of **treason**). Confessions for such crimes were often obtained under torture (with the use of thumbscrews, the rack or an iron maiden). If found guilty, people could be executed by being burned alive, hanged, or 'drawn and quartered'.

heresy
The act of doing something in serious conflict with the teachings of the Church

treason
the act of betraying one's own country or ruler

Source 7 Examples of the types of crimes, courts and punishment in Medieval Europe

The crime	The court	The punishment
A husband finds out his wife has been gossiping	Village courts, where minor criminal matters were heard	The wife would be paraded around the village by her husband
A lord discovers a peasant has their son educated without the lord's permission	Manor courts, where more serious matters were heard	The peasant would be fined or put in the stocks
A person is accused of heresy or witchcraft	Church court, where members of the clergy judged the accused	The person would be maimed (wounded), but never sentenced to death
A person is accused of murder or treason	King's court, where confessions were sometimes obtained through torture	The person would be hanged in public

Trial by ordeal

The legal system of early medieval Europe was based on the concept of 'guilty until proven innocent'. This is the opposite of our modern-day justice system, where a person is considered innocent until proven guilty. An accused person swore their innocence as an oath before God. Sometimes the oath of the accused was tested using trial by ordeal. There were three types of ordeal:

- *Ordeal by fire* – the accused held a red-hot iron, put an arm in a fire or walked across burning coals. If, after three days, the burn was not healing cleanly, they were seen to be guilty.
- *Ordeal by water* – the accused placed an arm in boiling water. As above, if the burn was not healing cleanly after three days, they were seen to be guilty. Ordeal by water could also involve the accused being bound and tossed into a river. If they floated, they were seen to be guilty. If they sank, they were seen to be innocent and were dragged out – hopefully before they drowned.
- *Ordeal by combat* – nobles who had been accused of a crime would fight their accuser. Sometimes a champion (such as a strong knight) fought on behalf of one or both of the parties. The winner (or whoever they represented) was seen to be innocent and the loser, if not already dead at the end of the fight, faced a violent punishment.

Source 8 This painting from 1471 shows an ordeal by fire. The woman is trying to prove her dead husband's innocence of a crime against the king by holding a red-hot iron bar. In her other hand, she holds her husband's head.

Source 9 A medieval painting of a court case with a trial by jury.

Changes to the medieval justice system

In 1154, Henry II became King of England. While the various types of trial continued to exist during his reign, Henry wished all his subjects to have access to royal justice. He wanted to establish legal rulings based on evidence and analysis. He and his court (the King's Court) travelled around the land, hearing cases. At this time, judges also began writing down court decisions. Over the centuries, this initiative continued to be refined. It set the basis for today's 'common law', as practised in England and in Australia – where judges' decisions, and the penalties for them, are based on similar examples from the past.

Another initiative of Henry II was trial by **jury**, which required a number of free men (usually 12) and a judge to decide a person's guilt. This lowered the chances of being found guilty, and over time it replaced trial by ordeal. It, too, continues to this day as a key part of the Western justice system.

jury
a group of people who are required to decide on a 'guilty' or 'not guilty' verdict in a court case

Key skill worksheet
Identifying continuity & change: Crime and punishment

Source 10 An artist's impression of King John of England reluctantly signing the Magna Carta.

The Magna Carta

By the early thirteenth century, King John ruled England. He was unpopular because he raised taxes, fought a series of unsuccessful wars and upset the Pope. The Pope was so angry that he banned religious services in English churches.

The nobles decided to act. They attempted to negotiate with John, and then forced him to sign a **charter** known as the **Magna Carta** on 15 June 1215 (see Source 10). The Magna Carta marked a significant legal development in England because it required the monarch to be subject to the will of others, not just to God. No longer could a king rule exactly as he saw fit.

charter
a formal document in which a person in authority states that certain rights or responsibilities are granted to others

Magna Carta
meaning 'Great Charter'; a document signed in 1215 by England's King John and his nobles – it outlined the rights of the people and meant that the king would thereafter be expected to rule according to the law

This is seen as one of the first steps towards the development of legal and political rights for 'the people' and the start of modern democracy. It has become the backbone to many human rights documents, such as the Universal Declaration of Human Rights and the US Declaration of Independence.

The Magna Carta also abolished trial by ordeal, and no more could people be condemned, tortured or killed on the grounds of suspicion or rumour. Source 11 outlines some of the changes laid down in the Magna Carta.

Some significant changes to medieval laws from the Magna Carta

- The king must not interfere with the Church
- When a lord inherits land, he should pay the king no more than £100
- The king cannot collect new taxes unless the lords and bishops agree
- No free man can be put in prison without a proper trial with a jury
- The king's men must not take anyone's goods without paying for them
- Justice will be given without delays or bribes
- Traders must be able to travel freely without having to pay tolls

Source 11 A summary of some of the 60 clauses in the Magna Carta

10.12 CHECK YOUR LEARNING

Review and understand

1. **Define** 'common law'.
2. **Describe** how the law was enforced in medieval Europe.
3. What is meant by 'community responsibility'?
4. **Identify** the year in which the Magna Carta was signed.

Apply and analyse

5. **Analyse** Source 10. Remember, when you analyse something, you should break it down into smaller parts and explain how they connect to each other. What is the artist trying to say? What are the elements in this image that help them get their message across?
6. What does trial by ordeal **suggest** about the level of education among the common people?
7. a **Compare** who or what enforces the law, actions taken when a crime is committed and penalties and punishments in Medieval Europe and today by copying the following table into your notebook and completing it.

	Medieval Europe	Today
Who or what enforces the law		
Action taken when a crime is committed		
Penalties and punishments		

   b Write a short paragraph that identifies the continuity and change between crime and punishment from medieval Europe to today.

Evaluate and create

8. **Research** various crimes during medieval Europe and their associated punishment method. Be sure to include a range of minor crimes (such as theft, nagging and vagrancy), as well as major crimes (such as treason, rebellion and heresy).
9. **Discuss** which was a more significant development in crime and punishment: the leadership of King Henry II or the signing of the Magna Carta. Justify (give reasons for) your answer.

Key skill worksheet
Determining historical significance: The Magna Carta

10.13 Developments in military and defence systems

In this topic, you will:

» explain significant developments in military and defence systems in medieval Europe.

Warfare was one of the chief ways a medieval kingdom in Europe could become powerful (either by fighting to expand its territory or by defending itself against invaders). The focus was often on capturing the enemy's stronghold, usually a castle. Castles were typically built in places that were easier to defend – on top of a cliff or hill, on an island, or jutting out into a lake.

Castle fortresses

In times of peace, castles were home to important rulers or wealthy feudal lords and their families, servants and vassals. At these times, only a small group of soldiers was needed to guard the castle. In times of war, however, castles became hives of military activity, as the ruler or lord called on his supporters to defend the castle by supplying him with foot soldiers, armour, weapons and often horses.

Knights and soldiers

In medieval Europe, knights were obliged to fight for their lord in times of war, as well as recruit others to fight for him. Some recruits were professional soldiers. These were men of the upper social class. They might be the younger sons of noble families, wanting to improve their standing through military service. Such soldiers were often called men-at-arms. Other fighting recruits were commoners or peasants. These men usually came straight from the fields or towns to fight. They often had no formal training and fought as foot soldiers because they could not afford horses. Their weapons and armour were much simpler than those of knights and men-at-arms.

Source 12 An illustration from a medieval manuscript showing a joust between Jean Chalons, an Englishman, and Loys de Beul, a Frenchman, in 1446

Military training

To stay fit and trained for war, knights fought jousts. Often these were public spectacles. Heavily armoured knights charged each other on horseback holding wooden lances ahead of them. Sometimes a long wooden fence, called a tilt, separated the charging horses. The idea was to knock the opponent off his horse.

Larger contests between hundreds of knights on horseback and soldiers on foot were also held during the medieval period. These events, known as tournaments, were mock battles – similar in principle to military training exercises today. By the thirteenth century, tournaments had become colourful spectacles (like carnivals) that created great excitement among medieval communities. A knight in the twelfth century once wrote: 'Eastertime was come, a great tournament proclaimed … and from every realm knights rode to break lance in honour of their lady.'

Changing castle design

During the medieval period, certain elements of castle designs changed and developed, improving on weak features and strengthening those that worked. Three castle designs evolved over this period in Europe.

Motte-and-bailey castles

Early fortresses were called motte-and-bailey castles. The motte was a raised area (such as a hill) on which a wooden fortress was built. Below it was an open area called the bailey, where barns, workshops and stables were located. Both the motte and the bailey were encircled by a gated timber palisade (a fence-like barrier, made of logs), a bank of earth and a ditch (sometimes filled with water).

Source 13 A motte-and-bailey castle

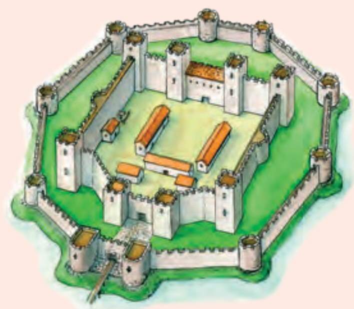
Stone castles with keeps

By the late tenth century, stone structures (called keeps) were starting to replace the wooden fortress in the motte-and-bailey design. These keeps – which were usually rectangular and up to four storeys high – were fitted out to withstand a siege. Thick stone walls replaced the palisade, and a wide moat replaced the ditch. Access to the castle was via a drawbridge.

Source 14 A stone castle with a keep

Concentric castles

Two hundred years later, the concentric castle emerged. It was based on designs crusaders had seen in the Holy Land. This stone and/or brick castle had two outer walls – with battlements – to provide an extra barrier against attack. The outermost wall was often curved ('concentric' means one circular wall inside another). The wall closest to the centre was the highest. There was a greatly reinforced gatehouse, but no keep.



Source 15 A concentric castle

A lasting castle

The Tower of London has transformed through all three castle designs. It was erected by William the Conqueror in 1066 as a wooden fortress. In 1077, it was upgraded to a stone castle with a keep that still stands today. In the twelfth and thirteenth centuries, concentric walls and a moat were added.

The Tower of London has served many functions over the years. It has been a royal residence for kings and queens, as well as a prison for the most wanted criminals. It is now a major tourist attraction and home to the Crown Jewels. If only walls could talk – just imagine the conversations and events they have witnessed inside this castle!

For more information on this key concept, refer to page 200 of 'The history toolkit'.

Source 16 The Tower of London, with Tower Bridge in the background

KEY CONCEPT
Continuity & change

siege
a military strategy to weaken an area by cutting it off from the outside world

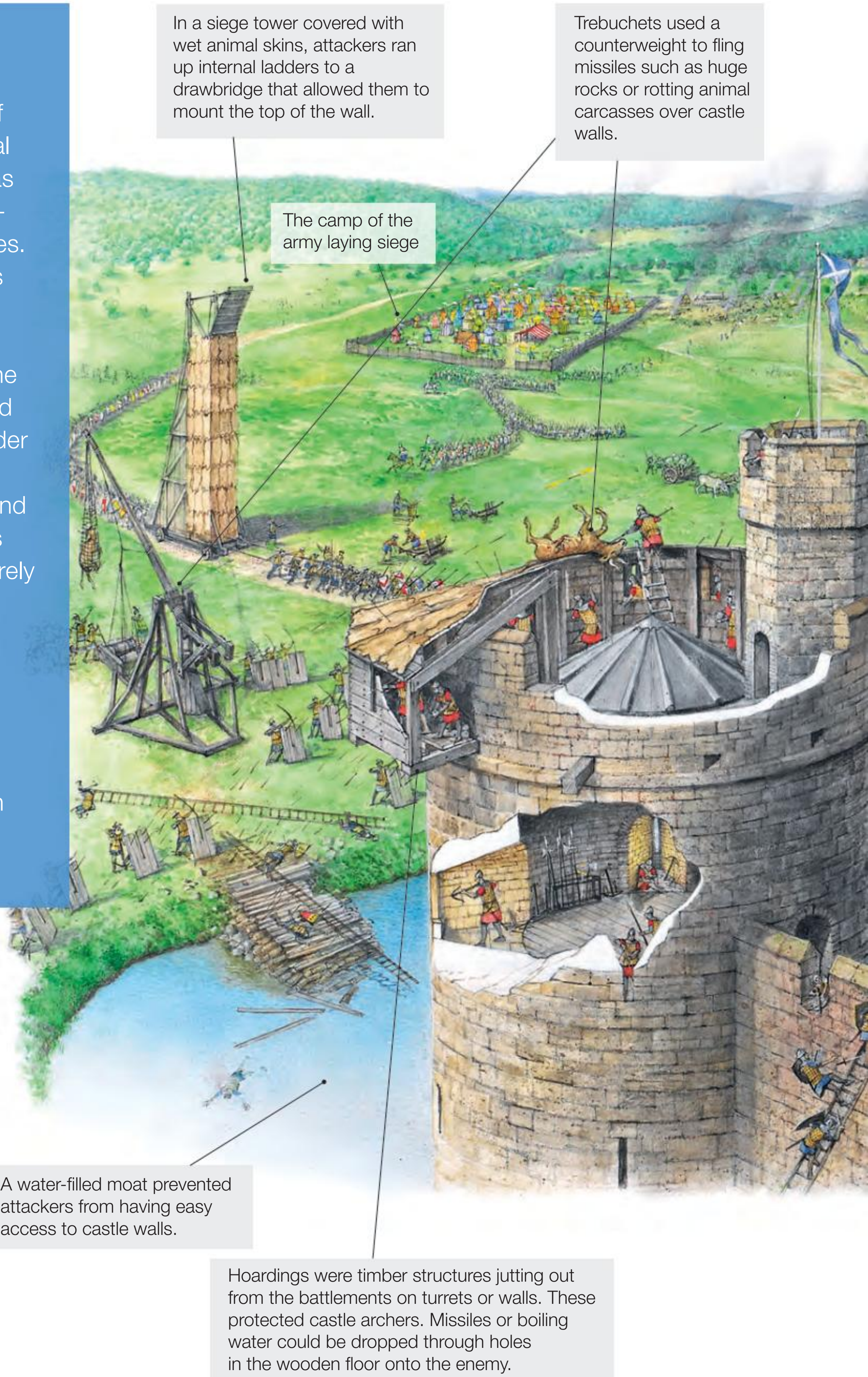
battlements
the top of the wall around a castle, with regular spaces, through which the people inside could shoot

Explore it!
A virtual field trip to the Tower of London

Castle siege

There were different ways of capturing castles in medieval times. The most obvious was to launch a surprise attack – smashing the castle defences. However, when the chances of victory from such a direct attack were low, armies would instead lay siege to the castle. Siege tactics included surrounding the castle in order to cut off its food supply, poisoning its water supply and digging under sections of its outer walls to gain entry. Rarely was a siege won quickly or easily.

Over the course of the medieval period, many advances in castle siege technologies were made. A variety of these are shown in Source 17.



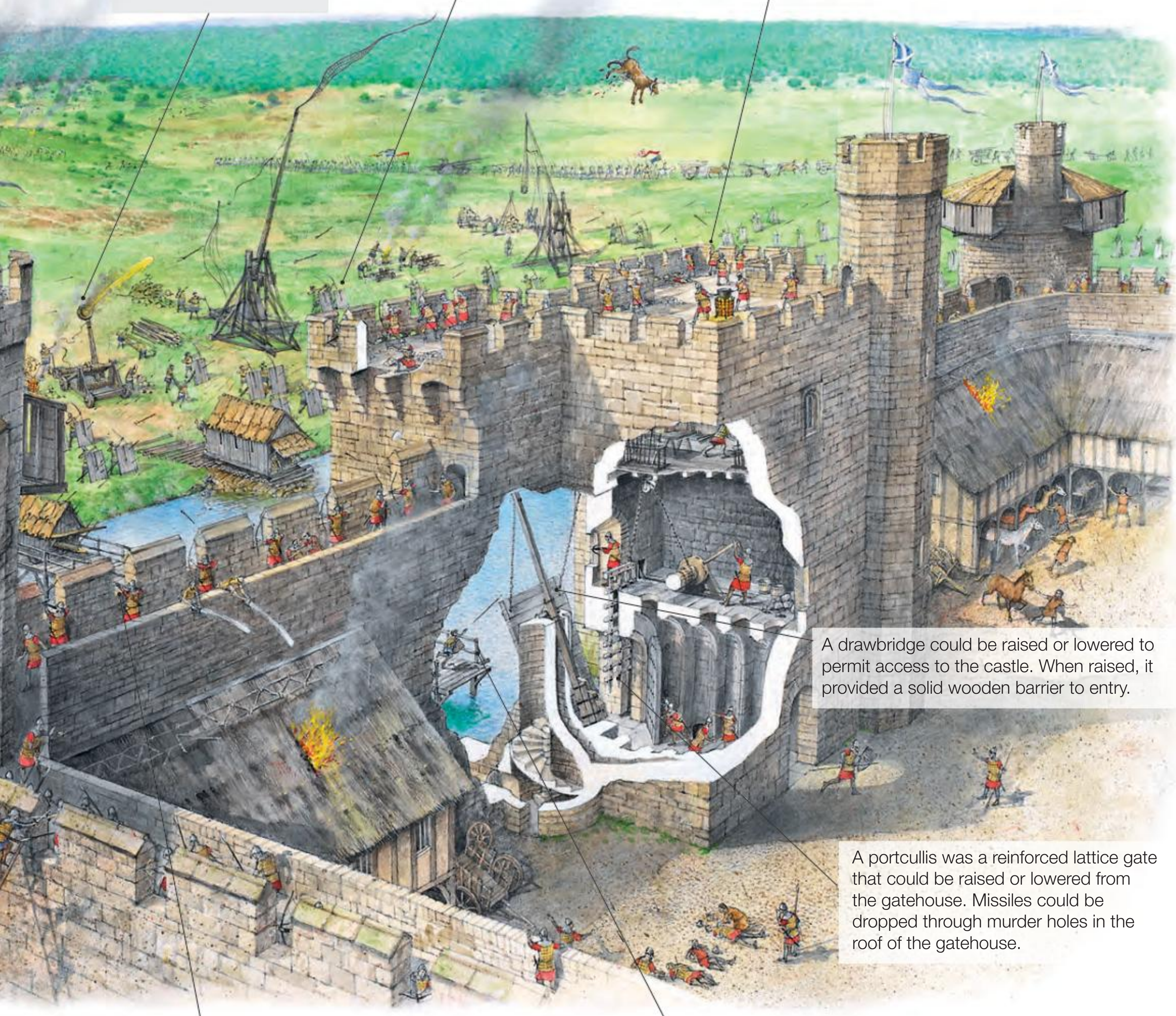
Source 17 An artist's impression of an attacking army laying siege to a castle

Interactive
Castle siege

Mangonels were like giant slingshots, flinging small rocks or burning wood. Sometimes the heads of captured enemies were flung back into the castle.

Skilled longbow archers could fire arrows great distances very quickly. They used mantlets (movable screens) as cover.

Battlements on top of the walls were crenellated, which meant the wall had a series of gaps to allow defenders to fire arrows or throw out objects.

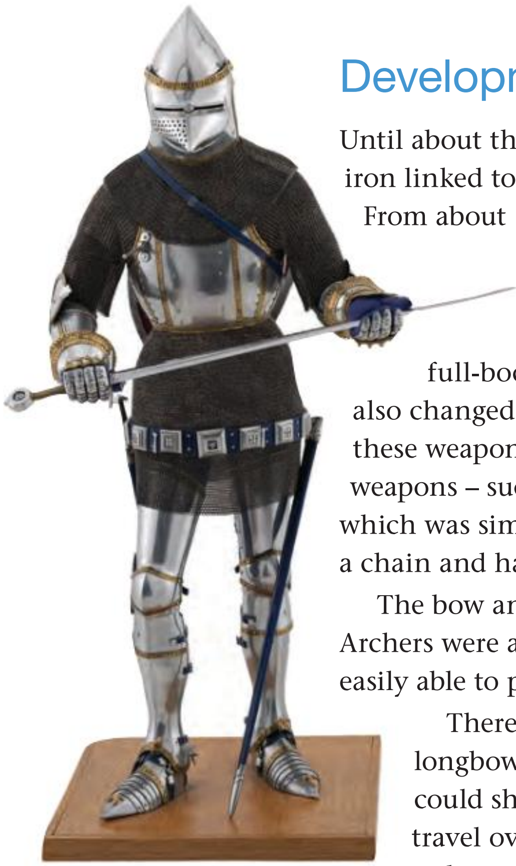


A drawbridge could be raised or lowered to permit access to the castle. When raised, it provided a solid wooden barrier to entry.

A portcullis was a reinforced lattice gate that could be raised or lowered from the gatehouse. Missiles could be dropped through murder holes in the roof of the gatehouse.

Thin arrow slits, wider on the inside, gave castle archers a wide field of fire but prevented entry of all but the most accurate of arrows.

A battering ram (large tree trunk, sharpened to a point) was wheeled up to a wall or gate, and used to repeatedly ram the gate or section of wall. Its operators could be protected by a wooden shelter lined with wet animal skins.



Source 18 The type of armour worn by a man-at-arms in Italy in the late 1300s, including chain mail and metal plates

Developments in medieval warfare

Until about the twelfth century, armour was made of chain mail (small hoops of iron linked together), which was fashioned into a knee-length tunic (see Source 18). From about 1300 onwards, however, metal plate armour became more common, eventually covering the whole body.

When using a shield, the fighter had only one hand for his sword, so early swords were light and made for one-handed use. However, full-body armour made shields less necessary. As such, the design of swords also changed – they became larger and heavier for two-handed use. The aim of these weapons was not so much to cut as to bash. Two free hands meant that other weapons – such as the mace (an iron club), spiked club (such as the morning star, which was similar in shape to a mace), flail (a metal ball, often spiked, attached to a chain and handle) and battleaxe – could be more easily used (see Source 19).

The bow and arrow was also a popular weapon during the medieval period. Archers were an important force used in medieval battles because their arrows were easily able to pierce through armour.

There were two main types of bow: the longbow and the crossbow. The longbow was a bow drawn by hand, which released an arrow. A skilled archer could shoot arrows very quickly, firing arrows every few seconds that would travel over long distances. The crossbow was a bow fixed across a wooden stock with a groove for the arrow. The crossbow required less skill to use as it had a mechanism for drawing and releasing the arrow.

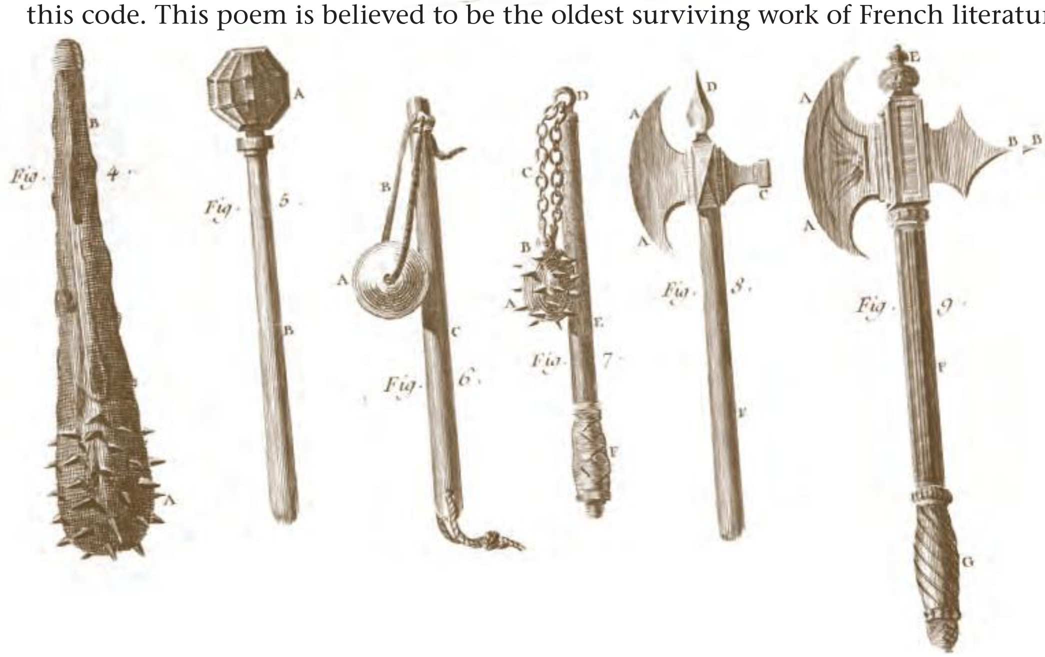
Code of Chivalry

Dressed in armour and carrying weapons, medieval knights often behaved as thugs. They recklessly **plundered** towns, causing mass **casualties**. As a result, the Church and nobles created a Code of **Chivalry** between 1170 and 1220 to set some ground rules for how a knight should behave. *The Song of Roland* – an eleventh-century French poem that described the duties of a knight (see Source 20) – was the basis of this code. This poem is believed to be the oldest surviving work of French literature.

plundered
stole from, often using violent force

casualties
people who are killed or injured in war or in an accident

chivalry
polite and kind behaviour that shows a sense of honour, especially by men towards women



Source 19 An illustration of a range of medieval weapons: (from left) a spiked club, mace, two flails and two battleaxes

The popular legend of King Arthur and the Knights of the Round Table strengthened the idea of chivalry, promoting the six key values of honour, honesty, valour, gallantry, loyalty and courtesy.

Gunpowder

Gunpowder reached Europe from China during the thirteenth or fourteenth centuries, where it had first been developed 400 to 500 years earlier. Gunpowder was another factor that helped to end Europe's feudal system. It did so by changing how wars were fought.

Gunpowder was first used effectively in Europe during the Hundred Years' War – a series of conflicts between France and England from 1337 to 1453. The use of weapons fired with gunpowder meant that castle walls could be more easily broken down.

Firearms increased the distance between fighting armies, and also meant that all soldiers in battle now required armour. This made it more expensive to equip and train an army. Kings, rather than nobles, had to take responsibility for this increased cost. As a result, the importance of knights began to diminish.

Source 20

- To fear God and maintain His Church
- To serve the lord in valour and faith
- To protect the weak and defenceless
- To give succour [help] to widows and orphans
- To refrain from the wanton [reckless] giving of offence
- To live by honour and for glory
- To despise pecuniary [monetary] reward
- To fight for the welfare of all
- To obey those placed in authority
- To guard the honour of fellow knights
- To eschew [avoid] unfairness, meanness and deceit
- To keep faith
- At all times to speak the truth
- To persevere to the end in any enterprise begun
- To respect the honour of women
- Never to refuse a challenge from an equal
- Never to turn the back upon a foe [enemy]

Translated extracts from *The Song of Roland*, *c.* eleventh century

10.13 CHECK YOUR LEARNING

Review and understand

1 **Identify** three locations where a castle might commonly be built (for security).

2 What two main purposes did castles serve in medieval Europe?

3 In your own words, **define** the six values outlined by the Code of Chivalry. Provide an example of what each value means in modern times.

Apply and analyse

4 Briefly **explain** how both castle design and armour design changed over time. Where relevant, explain what aspects of each continued (even if in another form).

5 **Examine** Source 17.

- a The Italian historian Petrarch used the word 'cunning' to describe warfare. **Define** the term 'cunning'.
- b **List** three cunning tactics or items used to defend a castle.
- c Choose what you believe are the three most cunning tactics or items an attacking army might use to force the surrender of a castle. **Explain** why you chose them.

Evaluate and create

6 **Create** a flow chart to show some of the ways gunpowder changed medieval warfare, both in the short term and the long term.

7 **Research** the Tower of London or another medieval castle to find out some of its features, traditions and historical uses. Choose a way to present your information. Include a map and some images of the castle, annotating the defensive structures used. Remember to include references to show where you found your information.

10.14 Developments in towns, cities and commerce

In this topic, you will:

» outline significant developments in towns, cities and commerce during the medieval period.

By 1200 CE, there were about 600 cities in Europe – three times as many as there had been 50 years earlier. The growth of towns and cities in medieval Europe was fuelled by trade, which boomed during the Crusades. Towns and cities attracted peasants who could earn a living as skilled labourers. Many also had cathedrals, so they attracted Christian pilgrims as well as merchants.

Source 21 A modern artist's impression of a medieval European town, *c.* 1400s, with a central marketplace

The growth of businesses

Merchants in medieval Europe mainly sold their goods in the marketplace, which became a central gathering spot within the town, full of bustling activity and noise (see Source 21). With these new markets also came wandering 'salesmen'. They could make large profits from selling goods such as spices, oils and perfumes from faraway places.

Over time, permanent shops and businesses were built. Those who worked in the same craft (such as butchers or carpenters) banded together to discuss working conditions. These groups were known as **guilds**. Guilds were similar to modern-day workers' unions.

Key skill worksheet
Identifying continuity & change: Guilds

guilds
groups of people all working in the same trade (e.g. butchers, tailors, cobblers) who band together in support of their common interests

The growth of moneylending and banking

As commerce and trade continued to grow in towns and cities across Europe, the need grew for moneylending, banks and financial record-keeping. Merchants in the Holy Land had been acting as moneylenders for generations, so many of their practices were brought back to Europe by the crusaders in the twelfth and thirteenth centuries. Loans enabled more goods to be purchased and traded, and this boosted town economies.

Rights outlined in many town charters

- The ability to trade freely
- Freedom to enter and leave the town freely
- The right to establish town laws independently
- The ability to hold trials in town courts, rather than the lord's manor court

Source 22 Some of the rights sought by townspeople and included in town charters

The independence of towns

As the wealth of townspeople increased, so did their desire for independence. Noble lords who 'owned' the land where a town was located were still requesting that the people who lived there paid taxes. The townspeople came to resent this. They started to present petitions to these lords, demanding release from old feudal arrangements and a set of rights. In return for large payments, some towns were given what they asked for, and town charters were drawn up in writing to set out what had been agreed by the lord and the townspeople.

Living conditions

Even though medieval cities had no sophisticated sewerage system, it was a common practice for people to empty chamber pots out of the window. Some wealthy people even built garderobes that stuck out from the walls of their second-storey apartments, allowing human excrement to fall directly on the heads of passers-by below (see Source 23). Poor sanitation led to health problems and the spread of water-borne diseases, as human waste from the streets often contaminated drinking water.

Source 23 An example of a garderobe in London

Medieval streets

'The Shambles' is one of the oldest preserved medieval streets in Europe, making it a source of evidence you could walk down!

This twisting laneway is so narrow that in sections, one person can touch both sides at once. Located in York, England, The Shambles was originally a marketplace for butchers, as described in the Domesday Book in 1086.

Meat hooks, which can still be seen today, allowed butchers to hang dead carcasses in the shop window and out the front, where they attracted flies, rats and bacteria. Butchers disposed of blood and guts by throwing them into the small channel that ran down the middle of the street.

For more information on this key concept, refer to page 201 of 'The history toolkit'.

Source 24 The Shambles is now a tourist attraction with antique shops, boutiques and cafes. The runnels in the middle of the street are where butchers would dispose of parts of animals that were not fit to be eaten.

KEY CONCEPT
Evidence

Key skill worksheet
Analysing cause & effect: The Shambles

10.14 CHECK YOUR LEARNING

Review and understand

1 **List** some opportunities that existed in towns and cities for peasants.

2 **Describe** the role of the marketplace in medieval towns and cities.

3 What were some of the problems faced in cities as they grew?

Apply and analyse

4 **Examine** Source 22. What does it tell us about the perspective of townspeople from medieval Europe?

5 **Explain** how the Crusades contributed to the growth of medieval towns.

6 French historian Philippe Contamine wrote that 'cities were mazes of twisting, tiny streets'. How do you think these small streets coped with the enormous amount of waste piled up in them?

Evaluate and create

7 Write a paragraph describing your journey down The Shambles in medieval York. Try to convey all five senses – sight, smell, sound, taste and touch.

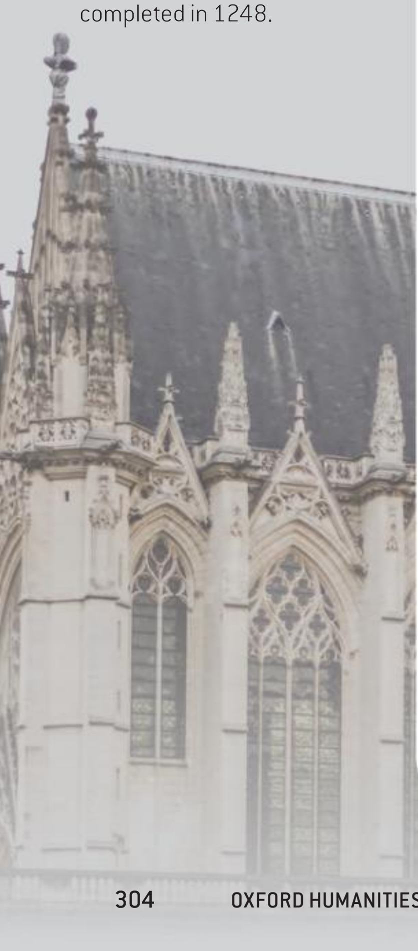
10C RICH TASK

Quizlet
Revise the key terms you have learnt so far.

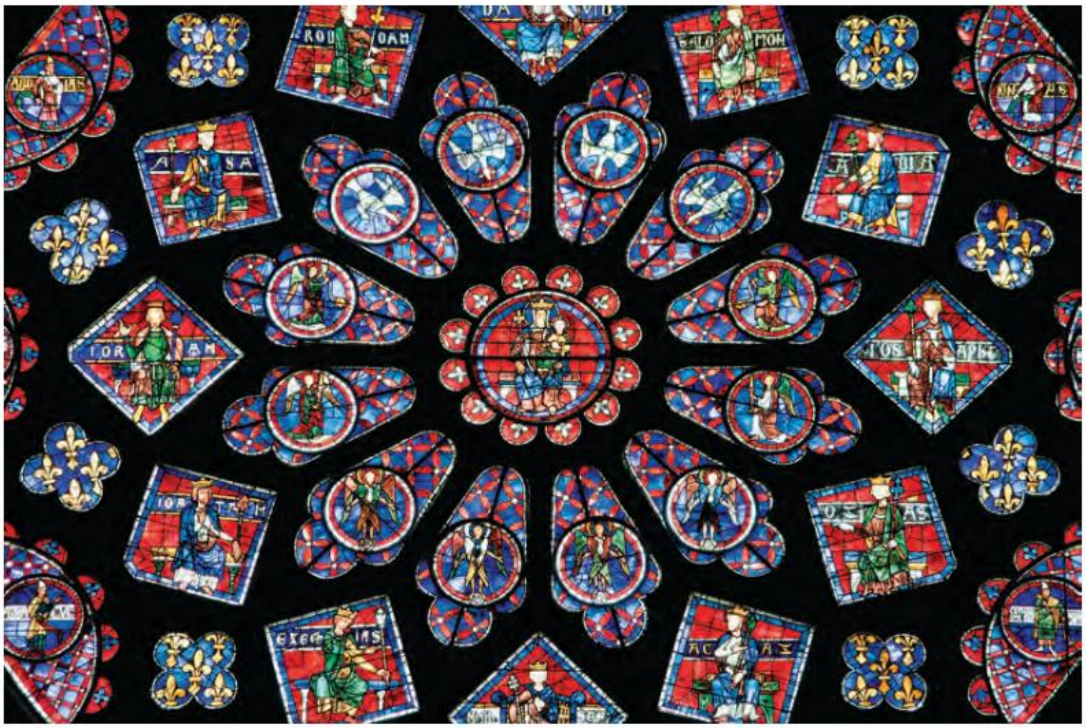
Stained glass windows

Another label given to the Medieval period is the 'Age of Faith'. This name refers to the dominance of the Church over all levels of society.

Some of the strongest remaining evidence of the Church's influence can be seen in medieval cathedrals and churches today. Until the fifteenth century, monks were usually the only people in society who could read and write. In order to form their own opinions and beliefs, common people had to rely on what they were told by village priests, what they heard and saw in religious plays, and what they saw in religious artworks, such as paintings and stained glass windows.



Source 25 Sainte-Chappelle in Paris is a royal chapel built in the Gothic style. It was completed in 1248.



Source 26 The north rose window at Chartres Cathedral in France was created around 1250–60, and is 10.15 metres in diameter. The cathedral's architect, Jean de Chelles, designed the window, and would have used skilled labourers to help construct it. The vibrant colours were created using molten glass, precious stones and paint. The theme of the window is Old Testament prophecies being fulfilled, with Mary as their instrument. Mary and Jesus as a child are at the centre.

Scenes in stained glass windows retold lessons and stories from the Bible, and also recounted important historical events. In this way, stained glass windows played an important part in educating people and ordering society by maintaining the power of the Church and the king.

KEY SKILL
Analysing sources

Identifying the origin and purpose of primary sources

Stained glass windows can be very useful primary sources. Unlike the windows in everyday buildings and houses, the stained glass windows in medieval churches and cathedrals across Europe were created for specific reasons. To understand these reasons, historians need to ask a number of questions. Analysing sources by asking 'what', 'who', 'when' and 'why' questions will help you identify the origin and purpose of the sources.

Use the table in Source 28 to identify the origin and purpose of a primary source.

For more information on this key skill, refer to page 213 of 'The history toolkit'.

Source 28

Identifying the origin and purpose of primary and secondary sources	
What type of source is it?	• Was the source created at the time you are studying or afterwards? In other words, is it a primary or secondary source?
Who created the source?	• Is the creator's personal perspective obvious in the source? • Is the creator a member of a particular group, religion or organisation?
When was the source created?	• How old is the source? • Is it an eyewitness account or was it written/created by someone at a later date? • Is the source complete?
Why was the source created?	• Was it designed to entertain, persuade or argue a point of view? • Did the creator have anything to gain personally from the source? • What other events may have been happening at the time and might have influenced the creator or source?

Source 27 Sainte-Chappelle has 15 windows, each 15 metres high. The stained glass panes depict over 1100 scenes from the Bible.

Practise the skill

1 Follow the steps in Source 28 to **identify** the origin and purpose of the stained glass windows at Chartres Cathedral in France (pictured in Source 26).

Extend your understanding

1 Use the internet to **research** Chartres Cathedral. Be sure to find multiple images of the cathedral from the outside.
   a **Compare** the size and appearance of Chartres Cathedral with the average peasant's home (see Source 12 in topic 10.6 on page 273). Describe how a peasant might have felt when viewing the windows in the cathedral.
   b Examine the position of the windows and how they were lit – to **explain** why they gave the viewer a sense of 'godliness' (awe and wonder).

2 Many of the windows make strong links between the Church and the king. **Explain** how links between the Church and the king in the Chartres Cathedral windows may have helped to maintain power over the peasants. In your explanation, refer to:
- the emotional reaction peasants would have had to the windows
- the way the feudal system functioned
- the benefits for the Church and nobility of these things being linked in the minds of the peasants.

10.15 The Black Death

In this topic, you will:

» identify the causes and symptoms of the Black Death.

pandemic
a term used to describe the spread of an infectious disease across an entire country, a large region, or even the whole world

buboes
the blackened, swollen, pus-filled lymph nodes (part of the immune system) evident on the body of someone with the bubonic plague

bubonic plague
an infectious disease caused by bacteria (called *Yersinia pestis*), which are carried by fleas on rats and mice; it often quickly kills those who contract it; visible symptoms include buboes

The Black Death was a plague **pandemic** that broke out in parts of Asia, Africa and Europe between the early 1330s and the 1350s. This pandemic did not become known as the Black Death until many years later. It was given this name because of the large black lumps, or **buboes**, that appeared on the victims' skin.

Causes of the Black Death

There had been outbreaks of plague in previous centuries, but the Black Death was by far the deadliest. By the time it ran its course, it is estimated that more than a third of the population in Europe had died from it.

Source 1 *Yersinia pestis* – the bacteria that lived in the stomach of fleas and caused the Black Death

The Black Death is now believed to have been a combination of three types of plague: **bubonic plague**, pneumonic plague and septicemic plague. Bubonic plague was the most common form of the Black Death. It was transmitted by infected fleas that were carried by rats. Rats were very common in the dirty, crowded conditions of medieval Europe. When a rat carrying infected fleas died from the plague, the fleas would jump onto a person to feed from their blood. The person bitten by the fleas would then be infected.

Pneumonic plague was the second most common form of the Black Death. It attacked a person's respiratory system and was spread through the air by the victim's cough. It was far more contagious and deadly than the bubonic plague.

Source 2 The black rat helped spread the Black Death throughout medieval Asia, Africa and Europe.

Septicemic plague was the rarest and deadliest form of the Black Death. It was also spread by infected fleas, but moved directly into the bloodstream and became life-threatening even before buboes had time to form on the skin. Septicemic plague killed almost 100 per cent of victims.

Medieval societies were significantly changed by the Black Death. Town populations were devastated, trade virtually stopped, and many manor lands and businesses were ruined. Family and social relationships were also shattered, for both the rich and the poor.

Symptoms of the Black Death

For most sufferers, the first sign of the Black Death was the buboes that appeared on the skin – usually in the groin, in the armpits or on the neck. They were initially red in colour, before turning purple and then finally black. They would spread all over the body. The victim would also get a fever and headaches. Over the next few days, the victim would lose motor control (the ability to move voluntarily), so that they could not speak or walk properly. They would suffer much pain and vomiting, and become delirious (meaning they lost control of their emotions and were unable to think or speak clearly).

The average time of death was between three and seven days from the first symptom. It is believed that between 50 and 75 per cent of those who caught the Black Death died.

Source 3 A medieval artist's impression of merchants conducting their trade; many historians believe it was medieval traders who were responsible for spreading the Black Death (see page 308).

The Decameron

One of the most significant primary sources of evidence that gives an insight into how the Black Death affected societies in Europe is *The Decameron*. It was written in the 1350s by the Italian author Giovanni Boccaccio (1313–75). Although Boccaccio created it as entertainment (it consists of a hundred lively stories told by young people who fled Florence to escape the Black Death), it provides key information about life in plague-affected communities.

For more information on this key concept, refer to page 201 of 'The history toolkit'.

Source 4

> It was not as it had been in the east, where nosebleeds had signalled that death was inevitable. Here the sickness began in both men and women with swelling in the groin and armpits. The lumps varied in size, some reaching the size of an ordinary apple and others that of an egg, and ... began to appear at random all over the body. After this point the disease started to alter in nature, with black or livid spots appearing on the arms, the thighs, everywhere ... These were a certain sign of impending death, but so was the swelling.

A translated extract from Giovanni Boccaccio, *The Decameron*, 1350s

KEY CONCEPT
Evidence

Analyse this!
The Decameron

10.15 CHECK YOUR LEARNING

Review and understand

1 In your own words, **define** the term 'pandemic'.

2 **Outline** why the disease became known as the Black Death.

Apply and analyse

3 Draw a human body and illustrate the various symptoms experienced by a person suffering from the Black Death. Annotate your drawing.

4 Create a flow chart to **summarise** how the three different types of plague were transmitted.

Evaluate and create

5 Conduct some **research** into the bacterium *Yersinia pestis*.

- a **Identify** who discovered it as the real cause of the Black Death, and when.
- b **Identify** who discovered the first effective treatment for the Black Death, and when.

Write a short report to show your findings.

10.16 The spread of the Black Death

In this topic, you will:

» map the origin and spread of the Black Death from Asia through to Europe.

Key skill worksheet
Sequencing events: The Black Death

Between around 1330 and 1351, the Black Death swept through Asia, Europe, North Africa and the Middle East, killing an estimated 100 million people.

Origins of the Black Death

Most scientists and historians believe that an especially lethal strain of plague broke out in China in the early 1330s, following a devastating famine. This area was then known as the Yuan Empire (which covered most of present-day China and Mongolia). It had been under Mongol rule since 1279. Some think that the disease was first carried westwards by Mongols travelling along the Silk Road.

In 1346, the pandemic reached a trading city on the Black Sea called Kaffa, which was controlled by merchants from Genoa, Italy. At that time, Muslim Turks (called **Tatars**) were attacking Kaffa and were infected with the plague. A fourteenth-century Italian writer, Gabriele de' Mussi, described how the Tatars 'ordered dead corpses [of their men] to be placed in catapults and lobbed [thrown] into the city in the hope that the intolerable stench would kill everyone inside. What seemed like mountains of dead were thrown.' The Genoan merchants in Kaffa fled to their boats and headed back to Italy, through the Mediterranean Sea. Their decision to make this journey would lead to the rapid spread of the Black Death into Europe and Africa.

Tatars
members of an ethnic group whose members can be found today in countries such as Turkey, Uzbekistan, Kazakhstan, Ukraine and Azerbaijan

Source 5 This fourteenth-century painting shows Venetian traders Niccolo and Maffeo Polo (the father and uncle of Marco Polo) crossing Asia to reach China in 1266, on what became known as the Silk Road. Around 50 years later, it is believed that the bubonic plague travelled the same route to the West.

The rapid spread of the Black Death

Once the Black Death reached the Mediterranean Sea in 1347, it spread quickly in all directions. It travelled northwards into Europe, reaching England and Norway by 1349 and Eastern Europe and Scandinavia by 1350 (see Source 6).

In Egypt, the death rate was so high that towns were abandoned, fishing almost stopped and the law courts were closed. Bodies littered the streets; they were eaten by wild animals or piled up in shops or mosques. A slave ship that had left Constantinople with 330 people on board arrived in Alexandria with only three survivors. Furthermore, the King of Yemen carried the disease back to his country in 1351, after he was released from a Cairo prison. Eventually, the whole of the Islamic world was affected, especially those living in towns or cities. Interestingly, **nomadic** Arabs were not struck down by the Black Death.

nomadic
a society of people who not live in a set place but move around, usually in search of food and shelter, and good pasture for their animals

ORIGINS AND SPREAD OF THE BLACK DEATH

1. The Black Death breaks out in China in the early 1300s.

2. As people and goods travel along the Silk Road, so does the Black Death.

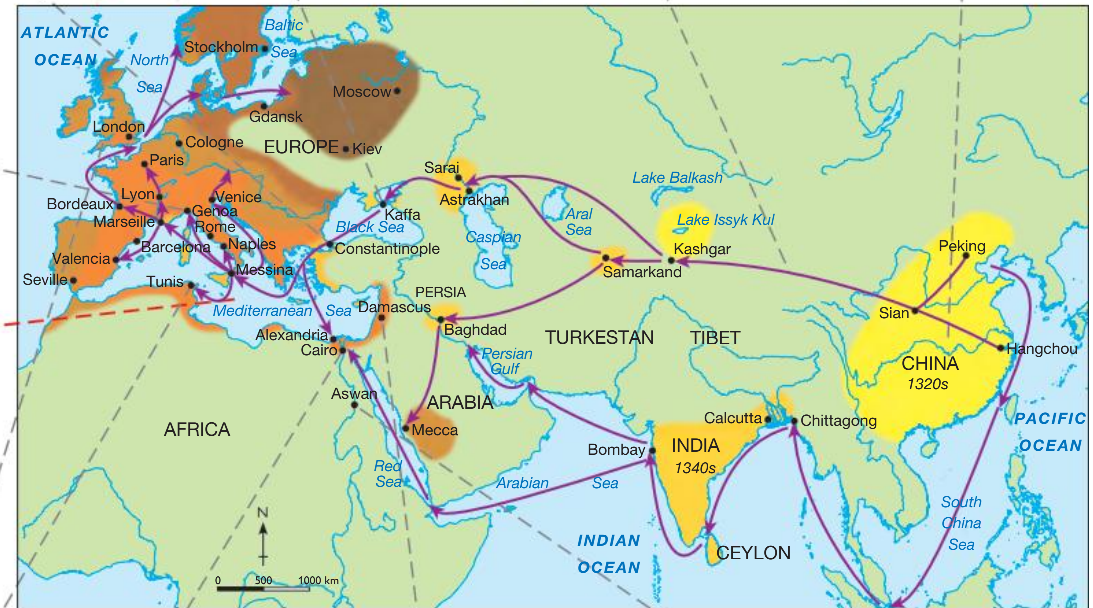
3. In 1346, Tatar troops become infected while attacking Kaffa, and spread the disease.

4. Genoan merchants flee from Kaffa in their ships back to Italy, docking at Constantinople on the way. They are carrying rats on board.

5. The merchant ships land in Genoa, spreading infection.

6. In 1347, infection rapidly spreads through the ports on the Mediterranean Sea.

7. In 1348–49, the Black Death spreads northwards across Western Europe, reaching England.



8. In April 1348, it reaches Tunis from Sicily and advances along the Northern African coastline.

9. In 1348, 1000 people are dying per day in Alexandria. In Cairo, 200 000 die – over a third of the population.

10. By April 1348, the Black Death reaches Palestine and Syria, killing 50 000 people in Damascus in one year around half of the population.

11. By 1349, the Black Death has travelled through the Nile Valley via boats to Aswan, 1000 km away.

LEGEND
- After 1350
- 1350
- 1349
- 1348
- 1347
- 1346
- Before 1346
- Direction and path
- City with recorded outbreak

Source 6

Source: Oxford University Press

10.16 CHECK YOUR LEARNING

Review and understand

1 Which social group was heavily responsible for spreading the Black Death and why?

2 Using the text and Source 6, **describe** the impact of the Black Death on Egypt.

3 Using the map at the back of this book, **identify** which parts of Europe were not affected by the Black Death, according to Source 6.

Apply and analyse

4 **Examine** Source 6.

a **Describe** the speed and reach of the Black Death across Asia, Europe and Africa.

b **Explain** why the disease travelled so far and so swiftly.

c **Identify** the year in which the Black Death had the greatest impact.

5 Why do you think nomadic Arabs were able to escape the Black Death? **Explain** your answer.

Evaluate and create

6 **Create** a timeline that lists key events in the spread of the Black Death from east to west. Include key dates for Asia, the Middle East, Africa and Europe.

10.17 Medicine at the time of the Black Death

In this topic, you will:

» explore the ways in which medieval medicine treated the Black Death.

Today, we know far more about many health conditions and diseases than medieval people did. Those suffering from the Black Death in the fourteenth century had no idea why they were dying. They knew nothing about germs or bacteria. The cause of the Black Death – the bacteria *Yersinia pestis* (see Source 1 in topic 10.15) – was not discovered until the late 1800s.

humours
four liquids – blood, phlegm, yellow bile and black bile – that were thought in the past to influence a person's health and character

Beliefs about the causes of the Black Death

It may seem strange to us today, but there were two common beliefs about where the Black Death came from during medieval times:

- On 20 March 1345, the planets of Jupiter, Saturn and Mars were unusually aligned. It was widely believed that the four **humours** of the body became infected when this unusual event took place, thus causing widespread sickness among people.
- Bad smells were commonly thought to be the cause of disease. To counteract this, people carried small bunches of flowers and burned rosemary in their home to give off a fragrant smoke.

Source 7 A nineteenth-century illustration of a typical plague doctor; plague doctors in medieval times were similarly dressed.

Medical care at the time of the Black Death

There were some university-trained doctors in medieval Europe, but only the wealthiest people could afford to visit them. Poor people received medical attention from monks or nuns, or healers in their community. Often, healers were older women, who were respected for their knowledge of illness and herbal treatments.

Plague doctors were specialist physicians hired by towns and cities to fight the Black Death, but they were not always well trained. Source 7 provides evidence of how plague physicians typically dressed. This was their form of personal protective equipment (PPE). Their heavy floor-length coats extended up the back of the head. They also wore a hat, and a bird-like beak, which was filled with strong-smelling items such as mint, garlic or vinegar. This was designed to protect them from contracting the plague.

Isolation and quarantine

Desperate measures were taken to separate the sick from the healthy, which today would be considered morally wrong. The houses of the sick were marked with a red cross on the door and the entire household was locked inside. In some cases, the doors and windows were bricked to stop people from leaving.

Cities in Italy introduced **quarantine**. The word 'quarantine' is derived from an Italian word meaning 40 days. Officials believed this number had religious significance, and so they made all incoming ships and traders isolate for 40 days before entering the city.

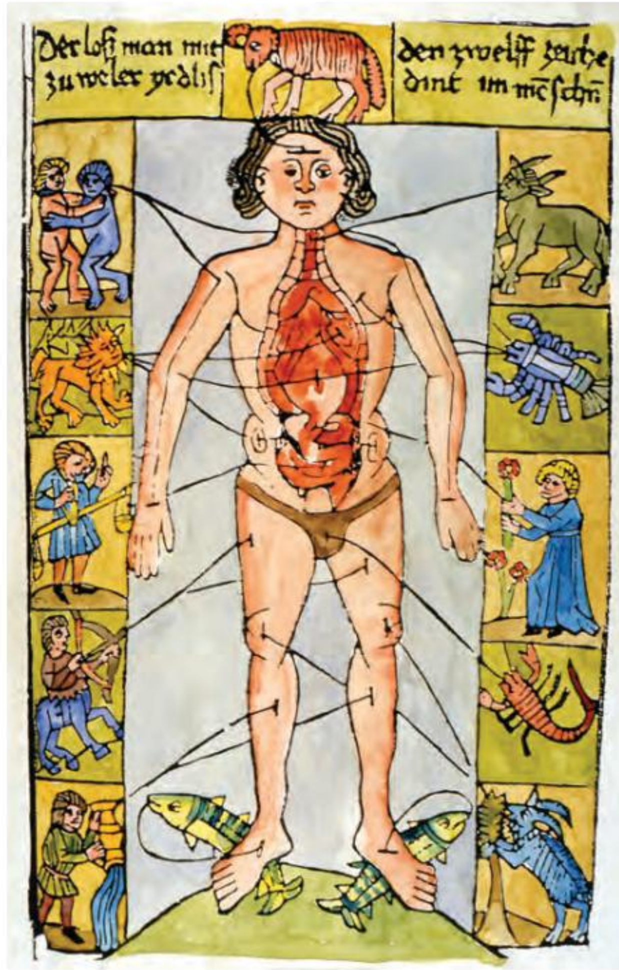
quarantine
a period of time when an animal or a person that has – or may have – a disease is kept away from others in order to prevent the disease from spreading

The city of Ragusa (in modern-day Croatia) was the first to pass laws requiring compulsory quarantine of all incoming travellers, ensuring that every visitor was completely disease-free before entering.

Medical treatments

There was a very limited understanding of human anatomy across medieval Europe, and surgical treatments were very crude. Surgeons often used the 'Zodiac Man' (see Source 8) to match up a patient's body parts with astrological signs, and guide their incisions and bloodletting. Bloodletting was a common treatment believed to cure illnesses and prevent diseases by removing 'dirty' blood. Leeches were sometimes used to suck out blood, or a person's vein was cut and a set amount of blood was collected in a dish. Often this procedure was done in a barber's shop – and the person who did it was the barber.

Other medical procedures included forcing a patient to vomit, or bringing on severe sweating or diarrhoea. Some doctors treated the buboes of plague victims by cutting them open to release blood. Then a mixture made from crushed dried toads and dried human excrement was spread over the open, pus-filled wound.



Source 8 This picture of the Zodiac Man is from a medical book used by medieval doctors.

10.17 CHECK YOUR LEARNING

Review and understand

1 **Identify** two causes of the Black Death, according to people at the time.

2 What methods were used to counteract (act against) bad smells?

Apply and analyse

3 **Explain** how astrology (study of the planets and stars) influenced medicine during the Black Death. Use an example from this topic.

4 With a partner, **apply** the concept of continuity and change to talk about isolation and quarantine measures in the time of the Black Death, and isolation and quarantine measures today. Share your discussion with the class.

Evaluate and create

5 a **Compare** the isolation measures in the time of the Black Death with the quarantine measures used at that time. What were their similarities, and what were their differences? Show these on a Venn diagram.

b Which method do you think would have been the most effective in preventing the spread of the disease? **Justify** (give reasons for) your answer.

6 'Desperate times call for desperate measures.' **To what extent** (how much) do you agree with this statement – totally, somewhat or not at all? Why?

Analyse this!
Zodiac Man

Worksheet
Medieval herbal remedies

10.18 Religion at the time of the Black Death

In this topic, you will:

- understand the response to the Black Death by different religious groups.

Nobody in medieval times understood the real cause of the Black Death, but this did not stop them looking for reasons why this terrible disease was devastating their world.

The Muslim response

In contrast to the Christian response, which sought to blame, Muslim people believed they should accept the Black Death – seeing it as a divine act that was meant to happen. They did not try to solve the disease with violence or self-inflicted persecution. Historians suggest that 33 per cent of the population of the Middle East died during the Black Death.

Source 9 An illustration in a 1411 Bible from Toggenburg in Switzerland, showing a couple covered in buboes and a priest performing a holy ritual

The Christian response

Christians believed the Black Death was God's way of punishing them for their sins. They sought salvation from the Church through prayer and rituals. However, monks and nuns who helped the poor also became sick.

In this time of crisis, the Pope spent most of his time sitting in a chair between two raging bonfires believed to purify the air. He offered comfort to the people by claiming that all those repenting for their sins would be forgiven.

Persecution of the Jews

Jews formed only a small minority of the population in medieval Europe. Christians looked down on them, believing they were responsible for the crucifixion of Jesus Christ. With the spread of the Black Death, many people were looking for someone to blame for their suffering, and the Jews were a common target.

Massacres of Jews began in the spring and summer of 1348, starting in France. In Germany, Jewish persecution began in November 1348 and continued for the next nine months. Some Jews managed to escape to Poland and then moved on to Russia, where large Jewish communities were established.

The flagellants

The flagellants were groups of radical Christians who roamed through Europe, wearing red crosses on their clothing. Organised in groups of up to 300 people led by a master, flagellants would walk into towns and villages and flagellate (whip) themselves until they drew blood. They believed that this would help them gain God's forgiveness for their sins and stop the Black Death. The flagellants also believed that Jewish people were responsible for the Black Death, and encouraged attacks on the Jewish populations in the towns they visited.

Quiz me!
A quick quiz on religion at the time of the Black Death

The sinners

Some people in medieval Europe became so depressed and disillusioned by what was happening during the Black Death that they gave up caring about religion entirely.

Without the strict moral guidance and teachings of the Church, some people began to show wild and careless behaviour. Spending all day drinking, laughing, singing and dancing took people's minds off their fear, and eased some of their pain. This mix of emotions (fear and celebration) is well captured in medieval artworks such as the *Danse Macabre* (see Source 11).

Source 10

[Some thought that moderate living and the avoidance of all superfluity [excesses] would preserve them from the epidemic … they shut themselves up in houses where there were no sick, eating the finest food and drinking the best wine very temperately [moderately], avoiding all excess, allowing no news or discussion of death and sickness … others thought just the opposite. They thought the sure cure for the plague was to drink and be merry, to go about singing and amusing themselves, satisfying every appetite they could, laughing and jesting [joking] …

… [B]rother abandoned brother, and the uncle his nephew, and the sister her brother, and very often the wife her husband. What is even worse and nearly incredible is that fathers and mothers refused to see and tend their children.

A translated extract from Giovanni Boccaccio, *The Decameron*, 1350s

Source 11 A section of a painting called *Danse Macabre* (or *Dance of Death*), painted in 1806; it is a copy of a destroyed wall painting from *c*. 1440.

10.18 CHECK YOUR LEARNING

Review and understand

1 a **Identify** the cause of the Black Death according to Muslims.
  b **Identify** the cause of the Black Death according to Christians.
  c How were these beliefs different?

2 Why and how were Jewish people persecuted during the time of the Black Death?

Apply and analyse

3 **Examine** Sources 10 and 11.
  a **Determine** whether these are primary or secondary sources. Explain your answer.
  b **List** the evidence from these sources that reveals the mindset of medieval people at the time of the Black Death.
  c Which source do you think is most helpful in understanding life at the time of the Black Death. Why?

Evaluate and create

4 **To what extent** do you believe the religious responses to the Black Death were morally wrong: totally wrong, somewhat wrong, or not wrong at all? Justify (give reasons for) your answer.

10.19 The end of the world

In this topic, you will:

» analyse the short-term effects of the Black Death on medieval Europe.

Source 12 illustrates some of the short-term effects of the Black Death. The plague caused a huge labour shortage in towns and on farms. Many feudal manors were largely deserted, because workers had either died or run away. At the time, many people believed it was the end of the world.

Source 12 A modern artist's impression of the impact of the plague on a medieval town

10.19 CHECK YOUR LEARNING

Review and understand

1 Using Source 12, **list** five short-term effects of the Black Death that have hit this medieval town.

10.20 The short-term effects of the Black Death

In this topic, you will:

» analyse the short-term effects of the Black Death on medieval Europe.

Short-term effects are those that were felt by people during the Black Death, and immediately after. People from all walks of life and all trades and professions were affected, as were all types of families.

Depopulation

It is difficult to give an exact figure for the number of people who died from the Black Death, with most primary sources and church records proving unreliable. Even before the Black Death, the average life expectancy in medieval Europe was only between 30 and 35 years, with a high infant **mortality rate**.

mortality rate
a measure of the number of deaths in a particular population

The effects of the Black Death on Eastern societies are even less well understood. It is known that the plague spread into other regions of Asia besides China, including the Khmer region and India.

The most recent estimates suggest the following approximate number of deaths as a result of the Black Death:

- 33 to 40 per cent of the population of Europe, with higher rates of death in rural areas
- 35 million people in China
- one-third of the population in the Middle East
- 40 per cent of Egypt's population.

Worksheet
The consequences of population loss

The effect on towns

Rubbish and raw sewage in the streets of medieval towns were a common sight, even before the Black Death. Once the plague struck, this became even worse. Abandoned houses were left dirty and untended, and muck piled up in the streets. There were few people to tend to the disrepair, even if they had wanted to.

After the Black Death had passed, some towns and villages slowly began to set up local health boards to develop and enforce sanitation procedures. These remained very simple, but included such moves as regulations to restrict the dumping of waste and the employment of street sweepers (see Source 13). Unfortunately, London experienced outbreaks of more diseases in the next few centuries, which suggests that these regulations were not enforced.

Source 13

Almost all the floors are made of clay and rushes from the marshes, so carelessly removed that the bottom layers sometimes remain for 20 years, keeping there below spittle and vomit and urine of dogs and men, beer that has been thrown down, leftovers of fishes and filth unimaginable … It would help also if people made the council keep the streets less dirty from filth and urine.

A letter from the Dutch scholar Erasmus to an English doctor in 1524, with his ideas to stop plagues

The effect on religion

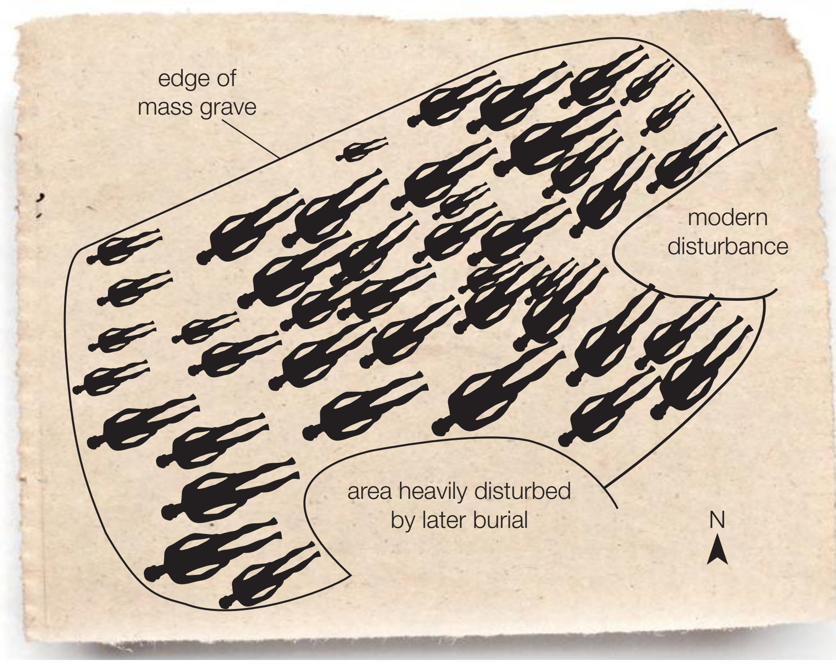
Many monks, nuns and priests died as a result of the Black Death. Some common people saw this as proof that the lifestyles of these religious people had displeased God. A few religious centres, such as monasteries, were accused of improper conduct and greed. Some priests and other religious figures fled – abandoning their parishioners because they feared becoming infected. Those who replaced them were often poorly trained. Some did not even live in the parishes they were meant to oversee. This added to the disappointment and anger of many ordinary people towards the Church and weakened its position in society.

Source 14 A manuscript illustration of a bishop blessing infected monks, *c.* 1360

Changes to burial practices

At the time of the Black Death, people were dying so quickly, and in such large numbers, that there was no time for proper burials or religious ceremonies. In fact, some Christian priests began refusing to bury victims for fear of contracting the disease. As a result, mass burials became common in towns, with groups of people buried in large graves.

In 2020 an excavation of Thornton Abbey in Lincolnshire, northern England uncovered the remains of over 48 people that had been buried in a mass grave (see Sources 15 and 16). Radiocarbon dating was used to determine that these deaths took place in the fourteenth century. A bone analysis positively identified the *Yersinia pestis* bacteria, linking these bodies to the Black Death.



Source 15 This illustration of the layout of the skeletons in the mass grave in Thornton Abbey shows how they were carefully arranged and organised – presumably by family members of the dead.

Source 16 This photograph shows how the rows of skeletons overlap.

The effect on medicine

The failure of medieval medicine to cure or prevent the spread of the Black Death led to changes in medical practices immediately following the plague. Frustrated with diagnoses and treatments that revolved around astrology and superstition, doctors and scholars began focusing more on clinical medicine and seeking to increase their knowledge of the physical world.

This approach led to an increase in **autopsies** and dissections of human corpses in a desire to learn more about anatomy. This in turn led to a greater understanding of the workings of the human body, and new medical texts and treatments. Hospitals developed into places of treatment, rather than being places where the sick were sent to die.

autopsies
examinations of bodies to discover – or find out more about – the cause of death

Source 17 This card was carried as a lucky charm, in the hope of warding off the Black Death.

10.20 CHECK YOUR LEARNING

Review and understand

1 Why is it difficult to give an exact figure for the number of people who died from the Black Death?

2 **Describe** the state of towns in medieval Europe after the Black Death.

Apply and analyse

3 What does Source 13 tell us about sanitation and hygiene in London in the centuries that followed the Black Death?

4 **Explain** how the Black Death led to a loss of confidence in the Church for some medieval Christians.

5 **Analyse** the short-term effects of the Black Death on medieval Europe. Remember, when you analyse something you should break it down into smaller parts and talk about how they relate to each other. For example, think about how the lack of religious burial might have contributed to a loss of faith in the Church. Be sure to use examples from this topic to support your answer.

Evaluate and create

6 Working in small groups, imagine you are in charge of cleaning up the medieval streets of London. What are some strategies you could employ to make this happen? Present your findings to the class, and then hold a class vote to decide the best ideas.

10.21 The long-term effects of the Black Death

In this topic, you will:

- analyse the long-term effects of the Black Death on medieval Europe.

Long-term effects are those that become clear over time. For example, looking back on the Black Death, we can see that it reduced populations across Europe. In some cases, the populations of whole towns were wiped out, leaving the countryside empty. Europe would not recover until the 1500s.

Weakening of feudalism

This massive drop in population drastically affected trade, manufacturing, and the production of food from the land. Skilled labourers and craftspeople were now in short supply. Survivors who had been trained in different trades were highly valued by employers. They now had more bargaining power and more social status.

Analyse this! Life on the manor

In time, this situation helped to break down the already weakened system of feudalism. Instead of providing their labour free in return for a lord's protection and support, knights and manor workers could now demand money for their services. In towns, workers could demand higher wages.

The wealth available to survivors of the Black Death is believed to have been at least five times more than it was before the plague struck. Spending increased in towns and cities, increasing the power and social position of surviving skilled workers. Prices also began to increase in some areas.

Source 18 A painting showing life on a manor, soon after the Black Death ended

Peasant unrest

Concerned by the increase in wages being demanded, some rulers tried to introduce new laws to keep wages low. They also tried to stop the rising cost of food, which was then being forced up by black market (illegal) trading and piracy (attacking and robbing ships at sea).

In England, the Statute of Labourers was introduced in 1351. This law made it illegal for employers to increase wages to attract new workers. It also made it illegal for workers to travel to other areas for better wages. This law upset many peasant workers. Indeed, it created some of the unrest that led to the Peasants' Revolt of 1381.

KEY CONCEPT
Cause & effect

The Peasants' Revolt

By 1381, the Black Death had caused the population across Europe to drop significantly. One of the major effects of this was the increased value that peasant workers, such as farmers and craftspeople, now had in society.

Source 19 An illustration of Wat Tyler being killed during the Peasants' Revolt

At this time, peasants were still required to pay taxes to support the king. When some refused to pay, they were fined or put in the stocks as punishment. When the Statute of Labourers was passed in 1351, it stopped workers from asking for better employment terms (such as higher wages or freedom to travel) despite their increased value in society.

Peasants all over the country felt disgruntled by this. In 1381, an uprising now known as 'The Peasants' Revolt' swelled across England. The leader of the uprising, Wat Tyler, was killed by the Mayor of London in June of the same year.

The Peasants' Revolt caused its own significant effects, one of which was the end of feudalism in England. Although this did not happen immediately, the revolt caused the upper classes to realise that they could not rule over the lower classes in the same ways they had in the past. They also realised that large groups of workers could be a significant political force to reckon with, and that changes had to be made.

For more information on this key concept, refer to page 200 of 'The history toolkit'.

Weakening of the Church

The fact that religious leaders were not able to limit the terrible effects of the Black Death – as well as the deaths of so many monks, nuns and priests – led to a lessening of many people's faith in the Church. In the aftermath of the plague, people began to question the influence and power that the Church had over society and to openly criticise some of its practices.

In time this would lead to a strengthening of power of the state over the Church and to movements, such as the **Reformation**, that would see the establishment of alternative Christian faiths.

Reformation
a movement that began in Europe in the sixteenth century when the scholar-monk Martin Luther publicly challenged the Catholic Church; it shifted the balance of power in Europe away from dominant control by the Church

The start of the slave trade

Another effect of the Black Death that had long-term implications was the start of the slave trade. The first African people brought to Europe as slaves were done so to boost Europe's greatly reduced labour force.

This group of people had been taken captive by Portuguese captains Antão Gonçalves and Nuno Tristão in Cabo Branco (modern-day Mauritania) in 1441. After this, the Portuguese established a steady trade in African slaves. Just over 10 years later, the Spanish also entered the slave trade.

The slave trade was initially established to provide labour in Europe. However, as European nations began to establish colonies from the sixteenth century onwards, the slave trade increased.

Foundations of the Renaissance

After the Black Death had passed, many wealthy survivors in Europe chose to invest in art or literature as a means of expressing their gratitude for being left alive. Some funded talented individuals to create paintings, build public buildings, or write literature. Others encouraged scientific research, hoping that answers might one day be found to the question of what caused the Black Death. These developments added to the cultural rebirth in Europe at the time, which would later become known as the Renaissance.

Source 20 *The Mona Lisa*, which is arguably the most famous painting of all time, was painted by Leonardo Da Vinci during the Renaissance.

Key skill worksheet
Communicating & reflecting: The medieval period

10.21 CHECK YOUR LEARNING

Review and understand

1 **Describe** how the population drop caused by the Black Death helped to weaken feudalism.

2 **Identify** when the Statute of Labourers was introduced.

Apply and analyse

3 **Explain** how some survivors of the Black Death helped the spread of Renaissance thinking in Europe.

4 Using a flow chart, **explain** how the weakening of the feudal system eventually led to the Peasants' Revolt.

Evaluate and create

5 In small groups, **create** a role-play for the class of a conversation between survivors of the Black Death and either their former lord of the manor or their former employer in a medieval town. Your role-play should focus on how things have changed (for all parties concerned) and should reflect the values and knowledge of the times.

6 In pairs, brainstorm ideas and then **create** a concept map titled 'The effects of the Black Death'. Use colours to categorise the connections. Look back over this chapter to add more knowledge and expand your concept map.

10D

RICH TASK

Quizlet

Revise the key terms you have learnt so far.

Morals, ethics and the spread of disease

When it comes to how we treat each other, some important terms to understand are 'morals' and 'ethics'. The term 'morals' relates to the judgment of right and wrong behaviour; whereas the term 'ethics' refers to the rules and conduct required to uphold morals. Historians are interested in studying the morals and ethics of a period so that they can understand what life was like at the time.

Source 21 An artist's impression of Jewish people being burned alive during the Black Death in the *Nuremberg Chronicle* (1493)

Source 22

> It was thought that the people … having seen the extermination of their neighbours and of all the nations of the world … would become better, humble and virtuous and catholic, avoiding iniquities and sins and overflowing with love and charity for one another … The opposite happened. Men, finding themselves few and rich by inheritances and successions of earthly things, forgetting the past as if it never was, gave themselves to more disordered and sordid [corrupt] behaviour than ever before.

Observations written in the fourteenth century by the Italian chronicler Matteo Villani, son of a respected merchant family in Florence

As you studied the Black Death, you may have felt many emotions about the treatment of various groups in society, including sick people and Jewish people. Perhaps more important is understanding how morals and ethics developed after this period. After such a devastating pandemic, did survivors change their views about how they treated each other? In Source 22, an Italian writer raises this very question.

Today, we are in a unique position, as we have experienced what it is like to live during a pandemic. The spread of COVID-19 (beginning in 2020) shaped our thinking with regard to what we value about life, and in some cases may have even changed our sense of what is important. There may have been elements of life during the Black Death that you compared with your own experience. For example, you may have felt great empathy for those quarantining in Italy, for the sick people locked in their houses, or for those suffering the devastating economic impact of the plague. You may also have felt a new appreciation for the importance of science, medicine and protective equipment.

KEY SKILL
Communicating & reflecting

Preparing a speech

Source 23 A student delivering a speech

You will often be asked to deliver an oral presentation, or speech. The main role of a speech is to persuade your audience. A speech should always be presented in a formal manner, and show off your knowledge about the subject on which you are speaking.

There are six main steps to preparing a speech.

Step 1 Reflect on what you have learnt so far. For example, try comparing your life today to life during the Black Death. Is there one specific aspect of life during the Black Death that has really captured your attention?

Step 2 Using your reflection from step 1, pick a topic for your speech. The most persuasive speeches will be those you make on topics that interest you. Perhaps something about the Black Death shocked you, evoked feelings of empathy in you, or left you wanting to know more. For example, your topic might be 'Religion during the Black Death'.

Step 3 Use your thoughts from steps 2 and 3 to devise a main argument for your speech. For example, if your topic is 'Religion during the Black Death', your main argument might be: 'The Black Death loosened the strong grip that that the Catholic Church had held over medieval Europe.'

Step 4 Write your speech. Your speech should have an introduction, a main section with supporting evidence, and a conclusion. You can also share your own opinion during a speech – tell the audience what you think about these arguments, or what parts of your research have challenged your thinking.

Step 5 Rehearse your speech so that you feel comfortable presenting it in front of an audience.

Step 6 Present your speech to your audience. Stand confidently, make eye contact with your audience and be sure to pause and take a breath at times!

For more information on this key skill, refer to page 218 of 'The history toolkit'.

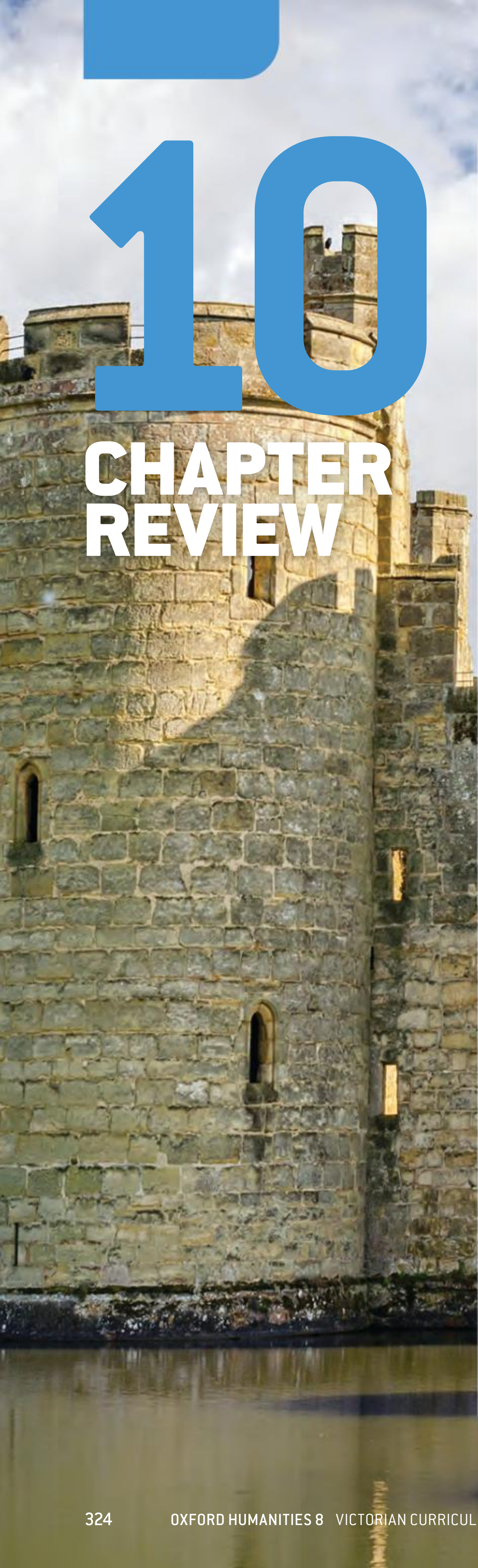
Practise the skill

1 Write a speech to **compare** something you have learnt while studying the Black Death to something from the modern day, such as COVID-19. Once you have picked a topic and devised your main argument, use the following dot points to help write your speech.
   - Address the concept of continuity and change.
   - Discuss the similarities or differences in the actions and opinions of society then and now.
   - Where possible, include your thoughts and feelings about the moral and ethical issues raised throughout your speech.

Extend your understanding:

1 **Suggest** reasons as to why ethics has become a fundamental part of scientific and medical research.

2 Write a reflective piece to **discuss** how society has developed with regard to the treatment of others since medieval times. In what areas could we improve further in Australia?



10 CHAPTER REVIEW

Review questions

10A How were societies in medieval Europe organised?

1 **Evaluate** feudalism as a social system. Remember to talk about the strengths and weaknesses of feudalism, and provide reasons for and against this social system. Conclude with your overall opinion. (10 marks)

(Total: 10 marks)

10B Why did societies in medieval Europe change?

1 **Outline** the significance of the year 1066 in medieval Europe. (2 marks)

2 **Describe** how the Christian teachings of heaven and hell influenced daily life in medieval Europe. (2 marks)

3 **Discuss** the human loss and suffering the Crusades caused to medieval Europe. (6 marks)

(Total: 10 marks)

10C What developments influenced life in medieval Europe?

1 In your own words, **define** the term ‘illuminated manuscript’. (1 mark)

2 **Summarise** the role of charters in medieval Europe. (3 marks)

3 **Discuss** whether developments in justice changed people’s lives during medieval times. (6 marks)

(Total: 10 marks)

10D How did the Black Death affect medieval Europe?

1 **Identify** the beliefs and actions of the flagellants. (2 marks)

2 **Outline** how the Black Death grew from a disease in a province of China to a devastating plague that killed millions in Europe and Africa. (2 marks)

3 **Determine** which two effects (long-term or short-term) of the Black Death brought about the greatest change to daily life in medieval Europe. Give reasons for your answer, using evidence to support them. (6 marks)

(Total: 10 marks)

Review activity

Examine the sources below and answer the questions that follow.

A peasant's life

Look at Sources 24 to 26.

Source 24 A manuscript illustration of the life of a peasant, representing the 12 months of the year (from left to right, top row to bottom row)

Source 25

In the following autumn no one could get a reaper [person who cuts grain with a sickle or scythe] for less than 8d … a mower for than 12d, with his food … sheep and cattle went wandering over fields and through crops and there was no one to look after them … many crops perished in the fields for want of someone to gather them.

Extract from Henry Knighton, a priest, written in the fourteenth century, after the Black Death

Rules for peasants on manors

- Work the lord's land as required
- Pay taxes to the lord, usually in the form of crops
- Ask permission to leave the manor or move house
- Ask approval from the lord to allow their daughters to marry or their sons to be educated
- Be punished or fined for breaking manor rules
- Pay fees to the lord for basic privileges (e.g. for grinding their grain in his mill)

Source 26 Some rules for peasants working on feudal manors

1. **Identify** whether each source is a primary or secondary source. (3 marks)
2. Using Source 26, **explain** how feudalism kept peasants powerless for centuries. (3 marks)
3. **Suggest** why a peasant's life in medieval Europe was hard. Refer to any of the three sources to support your answer. (3 marks)
4. Using Sources 25 and 26, **propose** how a peasant's life may have changed after the Black Death. Support your answer with background knowledge and examples. (6 marks)
5. Write a paragraph reflecting on the treatment of medieval peasants according to your moral and ethical views. In your reflection, **compare** your perspective to the perspectives of social groups at the time. (5 marks)

(Total: 20 marks)

Check your Student obook pro for these digital resources and more:

Student book questions	Key skill worksheet	Quizlet	Chapter review quiz
Chapter 10	Communicating & reflecting: Chapter 10	Play a game of Quizlet on Medieval Europe.	Chapter 10

CHAPTER 11

The Ottoman Empire

The Ottoman Empire ruled for over 600 years, from the Middle Ages to the start of the twentieth century. This chapter focuses on the period from 1299, when the Ottoman Empire formed, to 1683, when it was at its peak.

The location of their territories meant the Ottomans controlled the most important trade routes for gold, spices and other goods between Europe, Asia and Africa. This brought them great wealth, which they used to build powerful navies and armies. The Ottomans introduced Islamic faith, law and culture to the lands they conquered, but they also supported religious diversity and a level of self-government in their territories.

Source 1 The Sultan Ahmed Mosque (the Blue Mosque) in Istanbul

11A
How was society organised during the Ottoman Empire?

11B
What were the most significant achievements of the Ottoman Empire?

11C
What challenges and developments influenced the Ottoman Empire?

11.1 The Ottoman Empire: a timeline

Sequence this!
Key events during the Ottoman Empire

A portrait of Mehmed II

1250 CE — 1300 — 1350 — 1400

1299
Osman I declares independence from the Turkish tribes in Anatolia.

1307
Osman I expands his territory, conquering parts of Anatolia. His tribal group become known as the Osmanli Turks (or 'Ottoman' in English).

1326
Osman I's son Orhan conquers the Byzantine city of Bursa, which becomes the first Ottoman capital.

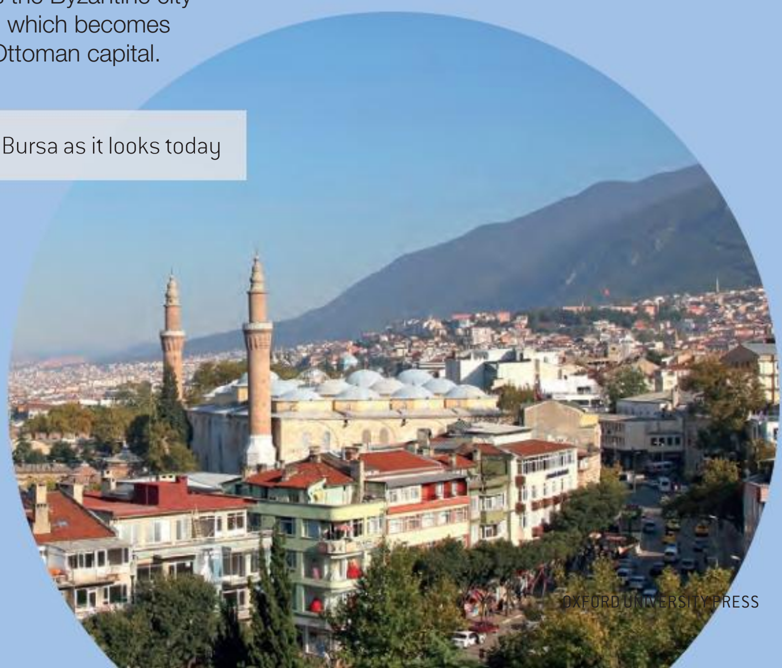
1347
The Black Death reaches Constantinople.

1355
The Gallipoli peninsula is captured. This allows expansion into Europe.

1361
The Ottomans capture Adrianople, in north-west Turkey; it becomes their next capital.

1389
Ottoman forces defeat the Serbs at the Battle of Kosovo. Bayezid I becomes sultan of the Ottoman Empire.

A view of Bursa as it looks today



Source 1 A timeline of some key events for the Ottoman Empire

1451
Mehmed II (the Conqueror) rules the Ottoman Empire until 1481.

1453
The Ottomans capture Constantinople and rename it Istanbul. This marks the end of the Byzantine Empire. Istanbul becomes the final capital of the Ottoman Empire.

1465
The Topkapi Palace is completed in Istanbul and remains the primary residence of the sultans for nearly 400 years.

1492
The Spanish king and queen order all Jews to leave the kingdom of Spain. Sultan Bayezid II sends his navy to Spain to collect Jews forced from their homeland.

1512
Selim I (the Grim) rules the Ottoman Empire until 1520.

1517
The Ottomans win military campaigns in Persia and Egypt. The holy cities of Mecca, Medina and Jerusalem become part of the empire. Sultan Selim I becomes caliph (leader of the Muslim faith).

1520
Suleiman I (the Magnificent) rules the empire until his death in 1566.

1526
Hungary is defeated at the Battle of Mohacs.

1529
Vienna is besieged by Suleiman I, but the attack fails.

1683
The second Ottoman attack on Vienna fails, marking the end of the Ottoman Empire's expansion.

1450 | 1500 | 1550 | 1650 | 1683 CE

A portrait of Suleiman I

A sixteenth-century artwork showing Ottoman troops departing for the Battle of Mohacs against the Hungarians in 1526

11.1 CHECK YOUR LEARNING

Review and understand

1 In chronological order, **list** the different cities that functioned as the capital of the Ottoman Empire.

2 **Identify** where Ottoman sultans lived for 400 years.

Apply and analyse

3 How many times did Ottoman armies attempt to capture Vienna? **Summarise** what this tells you about how the Ottomans viewed Vienna.

Evaluate and create

4 **Create** a timeline of all the sultans who ruled the Ottoman Empire from 1299 until 1683. For each sultan, include the years of their reign and one major achievement or event during that time.

11.2 The origins of the Ottoman Empire

In this topic, you will:

- map the expanding power of the Ottoman Empire, from its origins in Anatolia to its expansion throughout Europe, the Middle East and northern Africa.

The birthplace of the Ottoman Empire was a small area in north-west Anatolia, near the city of Ankara, the capital of present-day Turkey. By 1000 CE, Anatolia had been part of the Roman Empire, and its **successor** state, the Byzantine Empire, for over a thousand years. The Byzantine emperors ruled their territories from the city of Constantinople. Around this time, Turkish tribes began to move into Anatolia from the east.

The Turks were a **nomadic** people, who were migrating from their ancestral lands in central Asia in search of new farmland. They had converted to Islam and, as a result, the population of Anatolia changed from primarily Greek-speaking Christians to Turkish-speaking Muslims.

successor
a person or thing that comes after another

nomadic
a society of people who do not live in a set place but wander around, usually in search of food and shelter, and good pasture for their animals

The first Ottoman

In 1299, the Turkish tribal leader Osman I declared himself independent from other neighbouring Turkish tribes. More Turkish migrations from Asia into Anatolia started to put pressure on the population, and so the Ottomans continued to look further west for land.

Osman's lands bordered those of the Byzantine Empire, and he began to wage a religious war against the Christians of that empire. The war attracted followers from all over Muslim Anatolia.

Osman died in 1324 and was succeeded by his son, Orhan I (1324–62).

KEY CONCEPT Significance

Osman I

The name of the Ottoman Empire comes from its first ruler, Osman I, who ruled 1299–1324. Osman's followers called themselves Osmanli, which English scholars later recorded as 'Ottoman'.

Osman founded the empire in 1299 when he declared independence for his tribe. Up until this point, he had given his loyalty to the Seljuk Empire, which controlled most of Anatolia. But by the end of the thirteenth century the Seljuk Empire was weak. Osman realised that the time was right for him to seize more land and power, so he broke away from the empire.

Osman's territory bordered poorly defended lands belonging to the Byzantine Empire. He used this to his advantage, declaring religious war against the Christian Byzantines. This attracted the support of Muslim warriors throughout the region and greatly increased his power. But Osman also fought other Muslim leaders.

By the end of his reign in 1324, Osman had considerably expanded his original possessions. He had also started a dynasty of rulers that would last for six centuries (a dynasty is a period of rule by successive members of one extended family).

For more information on this key concept, refer to page 201 of 'The history toolkit'.

Source 2 A portrait of Osman I

The expanding empire

In 1326, Orhan captured the strategic city of Bursa from the Byzantine Empire (see Source 3), and this became the first capital of the Ottoman Empire. In 1354, the Ottomans crossed the Dardanelles, a long narrow body of water dividing Europe from Asia Minor (the most western part of Asia) along the Gallipoli peninsula. The following year, they captured Gallipoli itself. From here, the Ottomans had the perfect launching point for future attacks on Europe. They pushed on into the Balkans, capturing the major Byzantine city of Adrianople in 1361 and making it their new capital. In 1389, they marched on Kosovo, defeating the Serbian army.

From here, the empire expanded in three great waves under three different rulers:

- **Sultan** Mehmed II ruled from 1451 to 1481. He was most famous for capturing Constantinople (in 1453) and destroying the Byzantine Empire.
- Sultan Selim I ruled from 1512 to 1520. He gained control of Syria and Egypt, and the holy sites of Mecca, Medina and Jerusalem.
- Sultan Suleiman I ruled from 1520 to 1566. Suleiman took the Ottoman Empire to its largest size, ruling over much of south-eastern Europe, the Middle East and northern Africa.

Source 3 Bursa, the first capital of the Ottoman Empire, photographed in 2020

sultan
the ultimate ruler of the Ottoman Empire; he exercised complete political, military, religious, judicial and social control

Quiz me!
A quick quiz on the origins of the Ottoman Empire

THE OTTOMAN EMPIRE

Source 4 The Ottoman Empire was at its peak in 1683.

Source: Oxford University Press

11.2 CHECK YOUR LEARNING

Review and understand

1. **Describe** how and when the Ottoman Empire began.
2. **Describe** where the name 'Ottoman' comes from.

Apply and analyse

3. **Explain** why the capture of Gallipoli was important to the Ottomans.
4. **Examine** Source 4. Using this source and the world map at the back of the book, identify the present-day countries that had territories ruled by the Ottoman Empire at its peak, in 1683.

11.3 The rule of the sultan

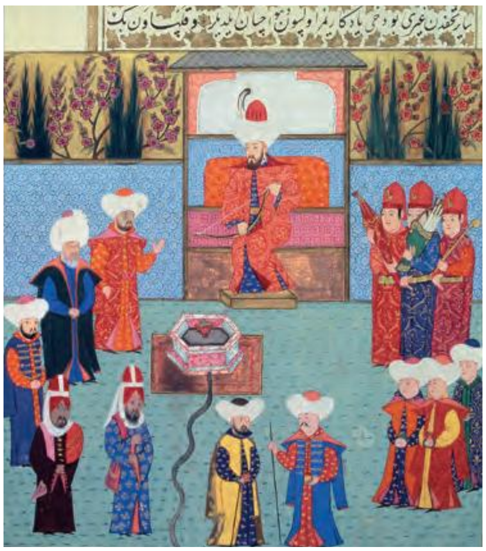
In this topic, you will:

» examine the power and responsibilities of the sultan in the Ottoman Empire.

Between 1299 and 1453, the Ottoman ruler was always one of a group of Turkish lords and princes. Other leaders in the region followed the Ottoman rulers because their growing success brought power and wealth to those associated with them.

The first Ottoman ruler to call himself 'sultan' was Bayezid I (who ruled from 1389 to 1403), the great-grandson of Osman I.

The sultan



Source 5 A fifteenth-century illustration of an Ottoman ruler and his court, *c.* 1330

In Ottoman society, the sultan had political, military, religious, legal and social authority and control. In the eyes of his subjects, he was responsible only to Allah (meaning 'god' in the Muslim world).

The concept of the sultan holding absolute power was introduced by Sultan Mehmed II. During his reign (1451–81), following the conquest of Constantinople in 1453, the status and power of the sultan increased enormously. He used this new status to strip away wealth and authority from other Turkish leaders. Mehmed also installed his own men in important positions in government and administration.

From that point, the sultan possessed total authority. In theory, he had life-and-death control over his military and all government administrators. In reality, however, the power of the sultan varied over time.

The high point in the power of the sultans was the period between 1453 and 1566. After the reign of Suleiman I (1520–66), the wars of conquest gradually slowed down, and then stopped altogether. As a result, people began to value administrative skills (rather than the skills of the warrior) in managing the empire. Power began passing from the sultan to other members of the royal household. Between the late sixteenth and mid-seventeenth centuries, the mothers and wives of the sultans also took more control over political matters, and wielded considerable power.

Source 6 A portrait of Mehmed II

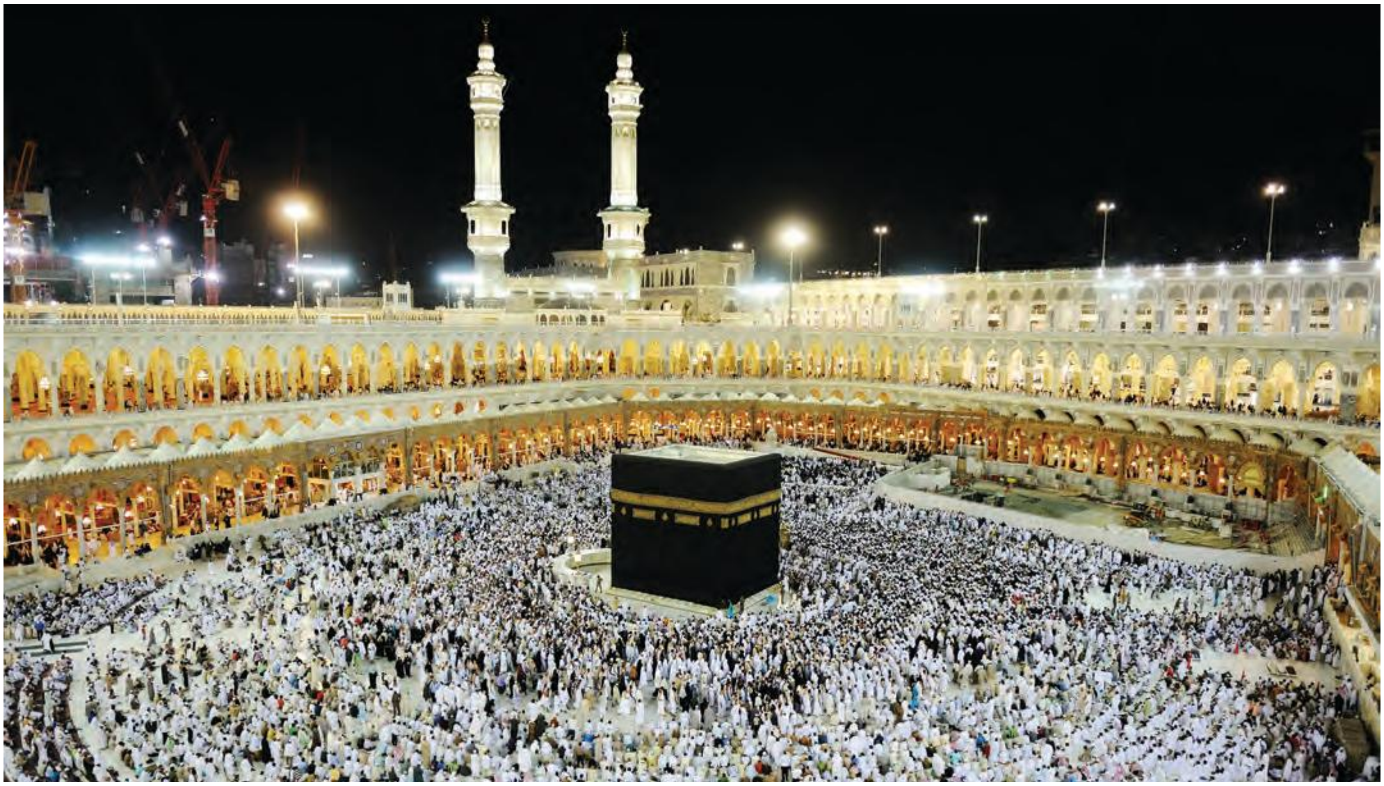
Caliph

From 1517 onwards, the Ottoman sultans claimed the title of **caliph**. The first Ottoman sultan to do so was Selim I. Selim took the title after conquering Egypt in 1517 and forcing the Egyptian caliph to sign power over to him. Selim also took control of the holy cities of Mecca and Medina. These places are sacred to Muslims as the birth and burial places of the Prophet Muhammad.

caliph
a historical title used for the religious and political leader of the Muslims; the caliph was regarded as the successor of Muhammad

Choosing a successor

A smooth transition from one sultan to the next was important. If there was no clear leader to take over when the sultan died, the empire could become unstable. The Ottomans tried several methods over the centuries of passing on power to the sultan's sons.



Source 7 Muslims flock to Mecca for the annual Islamic pilgrimage called the *Haj*.

From the fourteenth through to the sixteenth century, succession depended on the survival of the fittest – and the fastest! The ruling sultan would send all his adult sons to the provinces to serve as military commanders and administrators. When he died, the first son to return home to the capital and win recognition by the court and the imperial troops became the new sultan.

Fratricide

After taking power, it was common for a new sultan to commit fratricide (kill his brothers), or at least to order their execution. By doing this, he could remove any possible challengers to his rule. Sultan Bayezid I began the practice in 1389, when he had his brother Yakub executed.

Although fratricide was against Islamic law, it was declared legal during the reign of Sultan Mehmed II. Mehmed argued for the practice to be allowed because Allah gave the sultanate to only one of his sons, and so that son should be entitled to kill his brothers for the sake of stability. Mehmed's view was accepted by religious leaders, and fratricide became legal. Mehmed then ordered the execution of all his brothers. The preferred method for these approved executions was strangulation by a thin cord.

Religious leaders justified the practice by saying it strengthened the empire. Accordingly, when Mehmed III became sultan in 1595, he 'strengthened the empire' by having his 19 brothers executed.

11.3 CHECK YOUR LEARNING

Review and understand

1 **Identify** the first sultan to gain absolute authority.
2 **Identify** when the Ottoman sultans first took on the title of caliph.
3 In your own words, define the term 'sultan' and **describe** the power and responsibilities the sultan had.

Apply and analyse

4 **Explain** why the son of a sultan might be afraid of his brothers.
5 In your own words, **explain** what happened after the death of a sultan during the period when fratricide was practised.

Evaluate and create

6 **Create** a diagram to show how the role of sultan changed over time. Include at least three major changes and outline why they were significant.

11.4 Roles in Ottoman society

In this topic, you will:

- describe the social and political structure of the Ottoman Empire
- understand the role of women in society, and how it was different to women in other societies at the time.

Ottoman society was complex. At its largest, the empire spanned dozens of provinces in Asia, Europe and northern Africa. Within this enormous territory lived many different groups of people, each with their own customs, beliefs and history. To hold the empire together, the Ottomans developed unique political and social systems.

The empire followed the religion of Islam but it also promoted religious tolerance. Women had fewer rights than men. However, they had a lot of authority and power over their families, and at various times the women who lived in the sultan's palace had considerable political influence. Slavery was also an important feature of Ottoman society.

The structure of Ottoman society

At the absolute top of Ottoman society (see Source 9) was the sultan. The sultan could appoint or dismiss any official at his pleasure. Every decree or law came from him. In addition, the sultan was both the supreme military commander and the religious leader, responsible only to Allah.

Quiz me!
A quick quiz on roles in Ottoman society

The grand vizier and the *divan*

Underneath the sultan, a group of officials known as the 'dignitaries of the pen' administered his territories from the capital city, Istanbul. The most important of these was the grand vizier, or chief minister. He was appointed by the sultan and could only be dismissed by him. He held the sultan's imperial seal – his 'signature', which had to appear on all official documents – and could instruct and give orders to the other officials. The grand vizier's office was in the Topkapi Palace, which was the sultans' home from the fifteenth century onwards (see Rich task 11A on page 11.16). He worked with a council of officials, collectively called the *divan*, who were responsible for the day-to-day management and functioning of the empire.

Source 8 An eighteenth-century illustration of a grand vizier

Pashas and *beys*

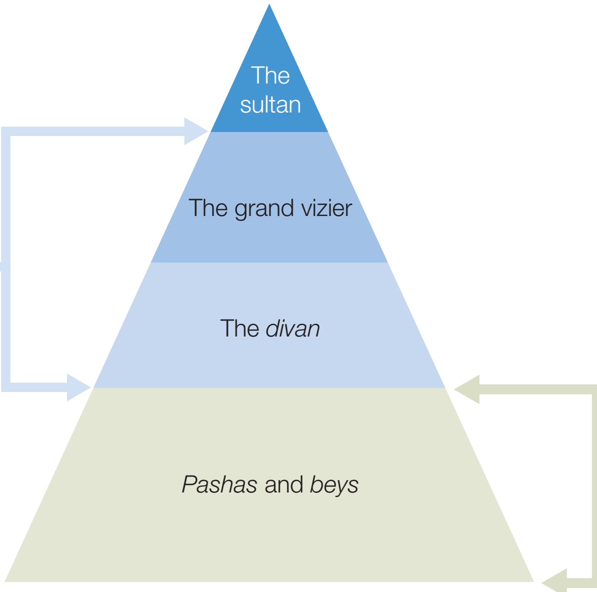
Further down in the political system were the 'dignitaries of the sword'. Known as *pashas* and *beys*, these were high-ranking military leaders, and the governors of the different provinces that made up the empire. The *pashas* and *beys* commanded the local military forces and oversaw law and order. They acted as judges in their provinces and collected taxes for the sultan.

Social advancement

The Ottoman political system allowed non-Muslim men to advance socially. Regardless of their position at birth, those who demonstrated skill and intelligence could climb through the ranks to achieve important positions. For example, many Christians took senior roles, such as grand vizier. However, the requirements for advancement were usually the acceptance of Islam, loyalty to the sultan and compliance with the standards of the court.

Dignitaries of the pen administered Ottoman territories from the capital, Istanbul.

They included:
- the grand vizier, or chief minister, who was appointed by the sultan and could only be dismissed by him. He held the sultan's imperial seal, which had to appear on all official documents, and he could instruct the other ministers.
- the *divan* was a council of officials who worked with the grand vizier; it was responsible for the day-to-day management and functioning of the empire.



Dignitaries of the sword were the governors of the different provinces that made up the empire.

Known as *pashas* and *beys*, they:
- commanded local military forces
- oversaw law and order
- acted as judges
- collected taxes for the sultan.

Source 9 An organisational diagram of the Ottoman civil administration

The *devsirme*

One Ottoman practice that divides modern historians was the *devsirme*. The *devsirme* was a system for training future government officials, engineers and soldiers. Children from the Christian villages of Anatolia and the Balkans were taken from their families and taught a craft or apprenticed to Turkish farmers. The most promising were sent to Istanbul, where they received the best education the state could provide, including religious training. The best students eventually became government officers and administrators. Many rose to become commanders and grand viziers, and played an important role in Ottoman history.

Only Christian boys were chosen for the *devsirme*. This was to prevent the development of a powerful Muslim upper class that could threaten the position of the sultan.

The *devsirme* offered great opportunities for males. It allowed peasant boys to rise to the highest military and administrative positions in the empire. On the other hand, Christian boys recruited to the *devsirme* were cut off from any further contact with their families, as the Ottomans believed that their loyalty should be to the sultan. They were also forced to convert to Islam.

So, was the *devsirme* good or bad? While some Christian families resisted the *devsirme*, others wanted their sons to be taken because they thought it would lead to a better life for them.

Some Muslims, however, resented the lack of similar opportunities available to them. Muslim families sometimes even asked their Christian neighbours to take and raise their children, hoping they might have a chance of being chosen for the *devsirme*.

For more information on this key concept, refer to page 201 of 'The history toolkit'.

KEY CONCEPT
Significance

Source 10 An illustration from a sixteenth-century manuscript showing boys being recruited for Sultan Suleiman I

Slaves

Slavery was an important part of Ottoman life. Slaves made up approximately one-fifth of the population of Istanbul. In the early centuries of the empire, most slaves were brought in from Africa; but as the empire expanded, slaves were taken from many other lands – often by being captured in battle.

Unlike their position in many other societies, Ottoman slaves could achieve great power and high status. Although they were technically slaves, some were given roles as servants and officers to the sultan. Many became involved in politics. Others held senior positions within the military or as guards of the sultan's **harem**. The sultan's elite fighting corps, the Janissaries, was made up of slaves and boys from the *devsirme*; and almost all of the government officials were trained slaves.

harem
during the Ottoman Empire, the separate part of a Muslim household reserved for wives, concubines and female servants

The Ottomans believed that slaves would be more loyal to the sultan as they had no family ties. They also thought slaves made better government officials as they came from outside the region they worked in, and so were less likely to favour one group over another or be open to bribery and corruption.

Women

Women in the Ottoman Empire had fewer rights than men, but they generally enjoyed more rights than women in many other countries at the time. Though it was normal for women to socialise separately from men, women actively participated in Ottoman society. Women had legal rights to property, and wealthier women often ran businesses or traded goods – using male agents to open shops or sail merchant ships on their behalf. Women from poorer families often worked as weavers or servants for wealthy businessmen or farmers.

concubines
women kept for the entertainment and pleasure of a ruler or emperor

Source 11 Anton Hickel's 1780 painting titled *Roxelana and the Sultan*

Most women married, but it was rare for an Ottoman woman to be able to choose her husband. Most marriages were arranged by women's parents, and often women would not even see the groom before the wedding. A man could legally take up to four wives, but was required to support them financially. He also had to pay each bride a dowry, or sum of money. If a husband failed to provide for his wife, she could apply to a judge for a divorce.

Women held considerable power within families. In the case of the royal family, the wives and mothers of the sultans became some of the most powerful people in the empire. They had unrivalled access to the ruler and helped him make political decisions.

Roxelana

One of the most powerful influences in the life of Sultan Suleiman I, who ruled from 1520 to 1577, was his wife Roxelana. The marriage shocked many at the Ottoman court because Roxelana was originally a foreign slave, who had been kidnapped and brought to Istanbul to be one of the sultan's **concubines**.

Suleiman was very much in love with Roxelana and their wedding was spectacular. They celebrated with music, jugglers and a procession of wild animals that included giraffes. Roxelana became deeply involved in court politics. Suleiman sought her advice on major decisions and relied on her for news when he was away from Istanbul fighting wars.

Source 12 A harem room in the Topkapi Palace

The sultan's harem

The word 'harem' means 'forbidden'. Harems were part of many Ottoman households. Other than the head of the household, men were forbidden to enter the harem.

The largest harem belonged to the sultan. It was located in the innermost section of the Topkapi Palace. This harem had dozens of richly decorated rooms, complete with mosaics and fountains. It was guarded by **eunuchs**. The sultan's mother, wives, concubines and daughters lived inside the harem.

The harem had its own complicated social structure. The mother of the sultan ruled over the other women. Next in the hierarchy was the wife who was the mother of the sultan's first-born son; then the sultan's other wives and concubines. The sons and daughters of the sultan were educated within the harem until they left the palace.

eunuchs
men who have been castrated by having their testicles removed; eunuchs had many responsibilities in the Ottoman Empire

Explore it!
A virtual field trip to Topkapi Palace Harem

Eunuchs

Eunuchs were the only people trusted by the sultan to enter the harem and guard the women who lived there. Eunuchs were mostly African men who were taken as slaves. The position of chief eunuch was a powerful position in the palace, as all the eunuchs who reported to him were in such close contact with the sultan and his family. Eunuchs supervised the education of the sultan's children and were in charge of the sultan's treasury. They also looked after the relics (important religious artefacts) of the Prophet Muhammad that were held in the Topkapi Palace.

11.4 CHECK YOUR LEARNING

Review and understand

1 **Outline** the responsibilities of the *pashas* and *beys*.

2 **List** the social groups in Ottoman society, by occupation.

3 In your own words, **describe** the social and political structure of the Ottoman Empire.

Apply and analyse

4 Using a Venn diagram, **compare** the rights of women in the Ottoman Empire and the rights of women in Australia today.

5 Slaves often held important positions in Ottoman Government administration, the military and the sultan's household. **Explain** two reasons for this.

Evaluate and create

6 **Evaluate** the system of being chosen for the *devsirme*. Remember, when you evaluate something, you need to talk about its strengths and weaknesses.

7 **Create** a short biography of Roxelana. Include discussion of the type of relationship she had with Suleiman I and examples of her political influence.

11.5 Daily life in the Ottoman Empire

In this topic, you will:

» outline the way of life for people in the Ottoman Empire, including their social institutions, food and sport

In Istanbul and other Ottoman cities, life for ordinary people was centred on the local community, known as *mahal*. Each *mahal* was made up of a particular religious or ethnic group living in a certain area. At the heart of the *mahal* was a religious building: a mosque, church or synagogue. Virtually every *mahal* also had its own school, drinking fountain and other public facilities.

In 1672, there were 253 Muslim and 24 non-Muslim *mahals* in Istanbul. These included Christian and Jewish *mahals*. Each *mahal* was responsible under Ottoman law for maintaining law and order within its own small territory, along with the correct payment of taxes.

Source 13 The Sultan Ahmed Mosque (or 'Blue Mosque'), an Ottoman-era mosque in Istanbul

Social institutions

Quiz me!
A quick quiz on daily life in the Ottoman Empire

The Ottoman Empire encouraged wealthy subjects to care for the less fortunate. Under Islamic law, giving a portion of your wealth to charity was considered a religious duty. This was done through special charitable foundations called *waqfs*, and through soup kitchens, known as *imarets*.

Waqfs

Islamic law had promoted *waqfs* since the seventh century CE to provide money for community purposes. Through *waqfs*, wealthy townspeople financed shops, public baths and bazaars. The sultan also regularly paid for the building of mosques, fountains and other buildings for public use.

A *waqf* was created when a wealthy person donated farming land or a shop so that its income could be used to benefit the community. Whatever was donated belonged to the *waqf* forever. Fields and pastures were the property of the state under Ottoman law, and so could be given only if the sultan agreed.

These *waqfs* came to play a vital role in the economic life of the Ottoman Empire. They provided for the maintenance of mosques, schools, soup kitchens, libraries and orphanages.

Imarets

Imarets were built in the major cities throughout the Ottoman Empire from the fourteenth century. They gave out free food to people such as travellers and the needy. *Imarets* reinforced Islamic teachings about the importance of charity. They also strengthened the position of the sultan, who was seen to be caring for the welfare of his people.

The bazaar

Explore it!
The Grand Bazaar

The bazaar was a place of public gathering and commerce. It was a huge marketplace that sold many different items. The Grand Bazaar of Istanbul was opened in 1461 and is still an active centre of trade today, making it one of the oldest covered markets in the world. It contains 58 covered streets with over 1200 shops and stalls selling all manner of goods, from jewellery to carpets. The spice bazaar, completed in 1660, became the centre of the spice trade in Istanbul.

Source 14 The Grand Bazaar of Istanbul still attracts thousands of visitors today.

Coffee houses

The Prophet Muhammad said that the drinking of alcohol was wrong because it interfered with the ability to worship Allah. It was seen as the devil's drink. Coffee was believed to be a better and more social drink.

Coffee came into the empire from Yemen, on the Red Sea, where it had been grown and drunk for many years. From the second half of the sixteenth century onwards, it was consumed both at home and in coffee houses throughout the Ottoman Empire. In coffee houses, men drank coffee, smoked, played cards, told stories, made music and played backgammon.

Source 15 A nineteenth-century European painting of a coffee house in Istanbul

Source 16 A Turkish coffee house today

In the seventeenth century, however, drinking coffee was frequently prohibited by sultans' decrees, forcing coffee houses to close. One reason for this was that coffee houses very quickly became meeting places. The sultans were worried that poorer men might gather there to discuss rebellion or revolt. Despite these prohibitions, the drinking of coffee became a typical feature of Ottoman and Middle Eastern culture.

Food

The Ottomans ate a wide range of foods. As the empire grew, new ingredients and recipes circulated throughout the major cities. The food eaten by the common people was simple. At the Topkapi Palace, however, hundreds of cooks sometimes worked in teams to prepare huge banquets.

Common foods

Common people normally ate a diet that included meat and vegetables local to their area. In Anatolia, a common dish was a thick porridge made up of whole wheat, berries and meat. Often the Ottoman diet was based more on vegetables than on meat. Falafel (fried balls of chickpeas and spices) were cooked and then wrapped in breads with sauces. People baked flat breads and ate them with spreads made from various grains and vegetables, such as hummus made from chickpeas. Many of these dips and spreads are common in Australia today.

Court foods

The Topkapi Palace had 10 kitchens and hundreds of cooks. By the seventeenth century, 1300 kitchen staff fed up to 10 000 people a day! Specialist cooks used spices and recipes from all over the empire to develop special dishes, such as stuffed pigeon and stuffed melon. As Islamic law forbade drinking alcohol, the cooks carefully prepared alternative drinks such as sherbets (sweet, chilled drinks made from fruits or flower petals) and coffee.

Source 17 A selection of Turkish foods commonly eaten today, including a variety of dips typically eaten with flat breads

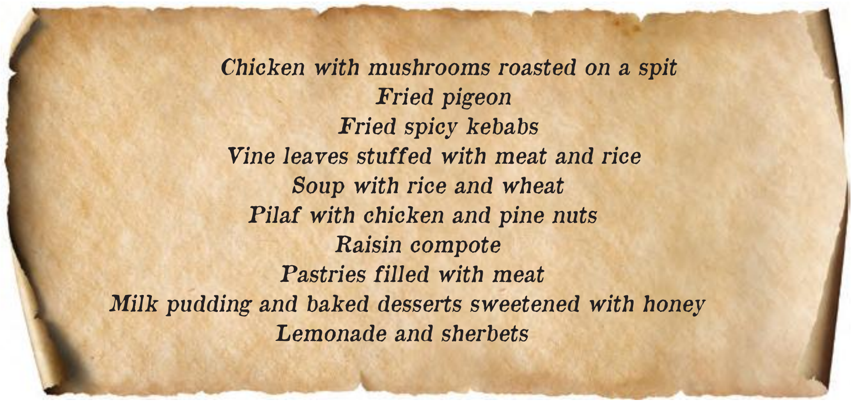
Sport

The favourite sports of the Ottoman Empire were those that prepared people for war. Archery and horse riding were extremely popular.

Jareed was an equestrian sport involving two teams of horsemen armed with rubber-tipped sticks. Teams were made up of six, eight or 12 riders. The riders started on opposite sides of a square; then they rode towards each other and threw their sticks, trying to hit one of the opposing players. A rider won if he hit an opponent or caught his stick. It was a fast and furious game, decided by the number of hits or catches at the end.

Another much-loved sport was oil wrestling. Strong men were selected, usually from groups of slaves. The wrestlers poured olive oil on their bodies before they began their fight. The sport was carried on throughout the empire, including during religious festivals. Oil-wrestling matches were even held on special evenings during Ramadan, the holy month of fasting.

Success as an oil wrestler brought rewards. A slave who was accepted into formal training as a wrestler had a chance of entering the sultan's elite infantry troops (foot soldiers), the Janissaries.


Chicken with mushrooms roasted on a spit
Fried pigeon
Fried spicy kebabs
Vine leaves stuffed with meat and rice
Soup with rice and wheat
Pilaf with chicken and pine nuts
Raisin compote
Pastries filled with meat
Milk pudding and baked desserts sweetened with honey
Lemonade and sherbets

Source 18 An Ottoman banquet menu from 1675

Source 19 Modern oil wrestling

11.5 CHECK YOUR LEARNING

Review and understand

1 **Describe** a *mahal*. Why was it significant?

2 **Identify** the institutions that gave out free food to those who needed it.

3 **Describe** the function of the bazaar.

Apply and analyse

4 **Explain** the *waqf* system and why it was an important part of Ottoman society.

5 **Examine** Sources 15 and 16. What do these images tell you about continuity and change in Turkish society since the time of the Ottoman Empire?

a **List** two things that have stayed the same and two things that have changed.

b **Explain** why this might be the case.

6 **Suggest** why sports such as archery, horse riding and oil wrestling were popular in the Ottoman Empire.

Evaluate and create

7 Source 18 is a list of dishes served to foreign ambassadors at the Ottoman royal court in 1675. **Discuss** what modern foods are equivalent to these dishes and create a menu for a modern Ottoman banquet.

11A
RICH TASK

A day at the Topkapi Palace

The Topkapi Palace was home to the sultans for almost 400 years, between the fifteenth and nineteenth centuries.

Sultan Mehmed II ordered the palace to be built after conquering Constantinople in 1453. He wanted his new home to display the power and glory of the Ottoman dynasty. The inner palace was completed by 1465 and contained lush parkland, fountains and highly decorated buildings. In the following centuries, successive sultans changed or added to the original buildings.

At the height of its use as a royal residence, the palace housed as many as 4000 residents. For ordinary people, however, it was mostly a forbidden city.

The palace was built around four main courtyards, set one inside the other. The general public could enter through the main gate into the first courtyard, but could go no further. Ministers, foreign ambassadors and those on official business passed into a second courtyard. Here the *divan* received them and considered their requests. The third courtyard was reserved for the sultan's royal household. Only the sultan's family, servants and invited guests were permitted to enter.

Source 20 The sultan's grilled window in the chamber of the divan

Quizlet
Revise the key terms you have learnt so far.

Source 21 Sultan Selim III receiving visitors in front of the Gate of Felicity

The final courtyard was an area of private relaxation for the sultan and his family.

The grand vizier directed the government from a chamber in the second courtyard. The sultan listened to his ministers from behind a golden grille, or screen, set into the wall. From behind the grille he could hear everything but not be seen. Ministers never knew whether the sultan was listening or not. If he rapped on the grille, the meeting ended and the ministers had to report to the sultan in another room, one by one.

Accounts of the time describe the splendour of the palace and royal ceremonies. On special days, such as holidays, the sultan sat on a throne in front of the Gate of Felicity, which led to the third courtyard. Surrounded by eunuchs and Janissaries, he received foreign dignitaries and other guests. The sultan forbade anyone but himself from riding a horse on certain paths leading through the second courtyard. In the inner courtyards he was even stricter. Servants were prohibited from speaking in his presence, and had to communicate in sign language.

Today, the Topkapi Palace is listed as a World Heritage site along with other parts of the inner city of Istanbul. Since 1924, it has been a museum. Many tourists visit the Topkapi Palace each year to learn what daily life was like in the sultan's palace and to visit the treasury, kitchens and harem.

Practise the skill

1 Create a presentation titled 'A day at the Topkapi Palace'. Your presentation should **describe** life at the palace from the perspective of one of the following people:
- a servant or member of the kitchen staff
- the grand vizier or a member of the *divan*
- the sultan or a woman in his harem.

Use information and sources from the text and your own research. Your presentation could be an 'interview', a short story, a diary entry, or another format you and your teacher agree on.

KEY SKILL
Communicating & reflecting

Writing descriptions

The purpose of descriptions is to give clear information about people, places or objects at particular moments in time. They focus on the main characteristics or features of particular people or things. They 'paint a picture' in words for readers to increase their understanding.

Descriptions must be well planned. Different types of sources need to be used to ensure that they present a balanced view and are supported by reliable evidence. Descriptions must follow a set structure, and events must be organised in chronological order. Use the structure in Source 22 to guide you.

Source 22

Structure of a description	
Introduction	• Introduces the subject • States the name of the person or event • Outlines why the topic is important
Body	• Provides details about the person or event (including dates and important facts) • Information must be organised in paragraphs, with a new paragraph for each detail • Quotations and descriptive words should be used where relevant
Conclusion (optional)	• Revisits the most important details and provides a concluding statement

For more information on this key skill, refer to page 218 of 'The history toolkit'.

Extend your understanding

1 Imagine you are a foreign ambassador visiting the Ottoman royal court in this period. Write a letter home to **describe** what you would have seen and experienced in the palace during your visit. For example, you might include in your letter an account of your audience with the sultan or an elaborate banquet.

11.6 Expansion of the Ottoman Empire

In this topic, you will:

- » identify the key events that led to the expansion of the Ottoman Empire
- » explain the reasons for the development of the Ottoman Empire, including the fall of Constantinople in 1453 CE.

Source 1 An example of the headwear worn by a sultan

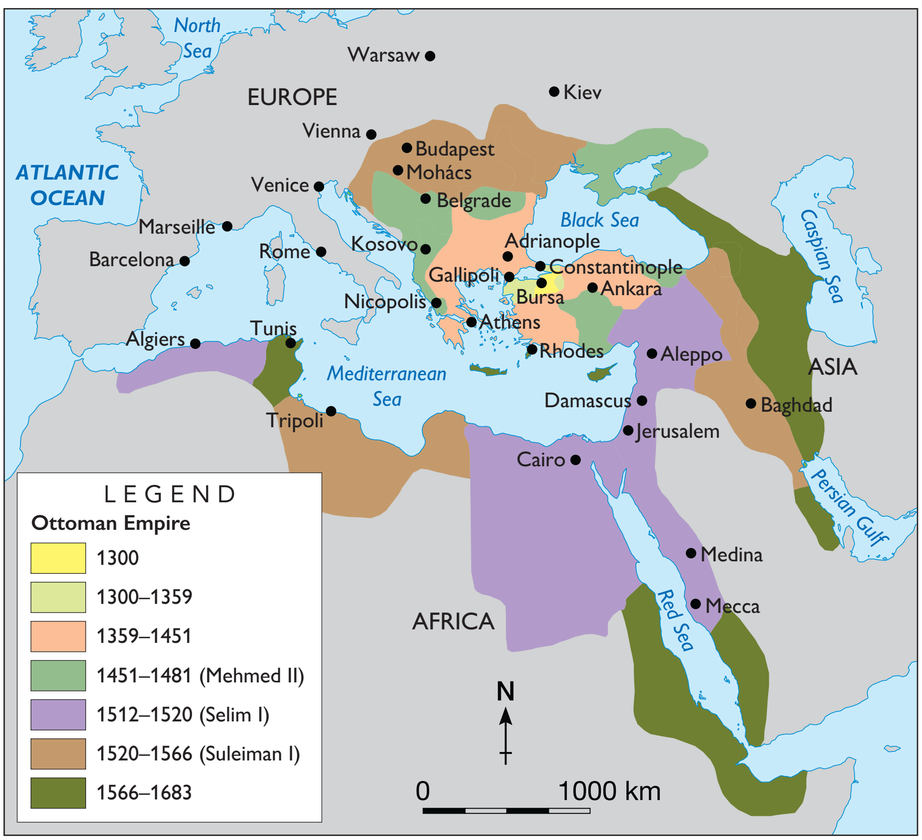
Between 1299 and 1683, the Ottoman territory grew from a tiny tribal kingdom to a vast empire. The Ottomans achieved their remarkable success because they had a powerful military with impressive, well-trained forces, both at sea and on land. For a long time, the Ottoman army was better disciplined and equipped than its European rivals.

The Ottoman Empire expanded most under Sultans Mehmed II, Selim I and Suleiman I.

Events during the rule of Mehmed II (1451–81)

Mehmed II, also known as 'Mehmed the Conqueror', is most famous for capturing Constantinople in 1453, when he was only 21 years old. He renamed the city Istanbul and made it the capital of his empire. He also conquered many other lands during his reign, including Serbia, parts of Greece and most of the coast of the Black Sea. He built new forts along the empire's coasts to guard against enemy ships, and increased the size of the navy.

THE EXPANSION OF THE OTTOMAN EMPIRE, 1300–1683



Source 2 Source: Oxford University Press

The conquest of Constantinople

By the mid-fifteenth century, Constantinople, the capital of the Byzantine Empire, was in decline. Yet it was still regarded as the centre of the Christian world. By then, the Ottomans had conquered all the surrounding land, and Mehmed sought to conquer Constantinople and make it less of a threat to Muslims – by turning it into a city for Muslims, Jews and Christians alike.

Analyse this! Painting of Mehmed II's army approaching Constantinople

Source 3 A painting by Italian artist Fausto Zonaro in 1903 shows Mehmed II's army approaching Constantinople, dragging a cannon.

Mehmed's military forces vastly outnumbered those of the Byzantine Emperor Constantine XI. According to one estimate, the city had only 4983 soldiers, whereas the sultan's army consisted of 300 000 men. As well as greater numbers, Mehmed had the advantage of better cannons. The largest of these was so heavy, it took 60 oxen to move it. It could fire stones weighing over 250 kilograms, doing terrible damage to the city walls.

The attack began on 6 April 1453. Constantinople's defenders fought bravely, but after a battle of 53 days, the city's defences failed. Cannons blasted a hole in the city walls and the attackers rushed into the city. Mehmed allowed his men to **plunder** and kill for three days before ordering them to stop. Many Christians were captured as slaves.

plunder
to steal, often using violent force

After the city fell, Mehmed allowed some of the former inhabitants to return and regain their possessions. Others fled westwards to Christian lands.

Events during the rule of Selim I (1512–20)

Under Selim I, who was known as 'Selim the Grim', the Ottomans defeated their rivals in Persia, Syria and Egypt. Gaining control of Syria and Egypt – including the great trading cities of Aleppo and Cairo – added greatly to the Ottomans' wealth because it enabled them to increase trade with India and Asia. The Ottoman Empire doubled in size under Selim, and its Islamic population was strengthened by the addition of provinces on the Arab Peninsula. The Ottomans also became the guardians of the holy sites of Mecca, Medina and Jerusalem.

Source 4 An ancient Ottoman coin

Events during the rule of Suleiman I (1520–66)

Probably the most famous of all Ottoman sultans was Suleiman I. Under his rule, the Ottomans fought almost constantly in Europe, the Middle East and across northern Africa. The territory under their control reached its greatest extent in this period. Suleiman was so successful in war that European rulers grew terrified he might conquer the whole continent.

In Europe, Suleiman captured Belgrade in 1521. He took the island of Rhodes in 1522, after a siege lasting five months. In 1526, he defeated Hungary at the Battle of Mohacs. Suleiman then marched further into Europe, laying siege to Vienna in 1529. But as winter set in, his army was forced to retreat. The Ottomans' advance into Europe had reached its limit.

Sequence this!
Expansion of the Ottoman Empire

KEY CONCEPT
Significance

Suleiman I

Suleiman I was known in Europe as 'Suleiman the Magnificent'. His subjects also knew him as 'Suleiman the Lawgiver' because he put together the empire's first complete set of laws. Among these laws were rules governing the fair collection of taxes and the ownership of property. Suleiman promoted meritocracy – that is, rule by the most talented, no matter what their birth – as the basis for promotion to high positions in government. He reduced the severity of some punishments for criminals. He also guaranteed some rights for Christians living in his empire. The system of laws he introduced became known as the Ottoman Laws and lasted into the nineteenth century.

Source 5 Suleiman I

For more information on this key concept, refer to page 201 of 'The history toolkit'.

11.6 CHECK YOUR LEARNING

Review and understand

1 **Identify** the three sultans who achieved the greatest expansion of the Ottoman Empire.

2 **Outline** the reasons that motivated Mehmed II's attack on Constantinople.

3 Identify and **describe** two key events that contributed to the expansion of the Ottoman Empire.

Apply and analyse

4 **Summarise** what happened to the inhabitants of Constantinople after the arrival of the Ottomans.

5 **Examine** the system of laws that Suleiman I introduced. Why do you think they lasted so long?

Evaluate and create

6 Choose one of the three Ottoman sultans mentioned on these pages and write a biography of him. Include **to what extent** you think he maintained or improved the strength of the empire.

7 How important was securing Constantinople for the Ottomans? How might their empire have developed differently if they had not been able to do so? **Justify** (give reasons for) your answer.

11.7 The Ottomans and the people they conquered

In this topic, you will:

- outline the *millet* system in place during the Ottoman Empire
- discuss the tolerance of the Ottomans towards other religions, including Christians and Jews.

The Ottoman Empire came into contact with many other societies. It conquered the Byzantine Empire and took Christian lands in Greece, the Balkans and Hungary. It fought with other Muslim states in Egypt, Syria and Mesopotamia. For the rulers of these lands, conquest by the Ottomans meant humiliation at the very least, and possibly exile or death.

For ordinary people, however, Ottoman rule could be a good outcome economically. Ottoman officials seized land and money – that had fallen into the hands of local lords and monasteries – for the empire. The new Ottoman subjects often found themselves paying fewer taxes than they had to their former rulers.

Forced relocation

One of the ways that the Ottomans sought to integrate newly conquered peoples into their empire was through forced relocation. Conquered peoples would be forced to move to other parts of the empire, and others would be brought in to take their place. This was done to strengthen the Ottomans' hold on their new lands. With many of the original inhabitants gone, it was less likely that the new territory would try to revolt.

Source 6 A golden censer, used to burn incense during religious ceremonies

Source 7 The Fetiye Cami Mosque, Ioannina, Greece; Muslims settled in Christian lands such as Greece to strengthen the Ottomans' hold on their new territories.

Religious tolerance

Christian leaders in Europe described the Ottoman Empire as the 'cruellest enemy of Christ's name'. The Ottomans were, however, very tolerant of different religions. Under the laws of Islam a person could not be forced to convert to Islam, so the Ottomans did not usually attempt to make people do so (with the exception of the *devsirme*: see topic 11.4). When Sultan Suleiman I conquered Rhodes, he promised the Christian knights defending it that if they surrendered, 'I shall not require of you any tribute, or do anything … against your religion'.

Many different types of Muslims lived within the Ottoman lands, and the empire did not persecute those that were not of the sultan's sect, or branch of Islam. The two main branches of Islam were Sunni and Shi'a. The sultans were followers of Sunni Islam, but they took care to address the needs of their Shi'a Muslim subjects.

Source 8 There is still a strong Orthodox Christian Church in Istanbul.

Defeated peoples were integrated into Ottoman society and could gain wealth and a level of prestige. No attempt was made by the state to assimilate (absorb) the various religious and ethnic communities within its borders. As long as the empire's laws were followed, individuals and communities could carry out their customs and religious practices freely.

In particular, many Greek Orthodox subjects welcomed the Ottomans, as they allowed them to practise their faith. By contrast, the Roman Catholic Church, led by the Pope, had tried to stop them. In 1454, Sultan Mehmed II granted the leader of the Orthodox Church (known as the patriarch) total authority over his community in return for the payment of a special tax. He did the same for the Armenian Church. This became known as the ***millet* system**, and it allowed different religious groups to live side by side in relative peace.

***millet* system**
a special legal system in the Ottoman Empire that allowed non-Muslims communities to use their own laws and largely govern themselves

Millet system

Usually, the head of the *millet* was the leader of a significant religious group. For example, the Patriarch of Constantinople governed the Greek Orthodox Christians in the empire. There were four very strong *millets*: the Greek Orthodox, the Armenian, the Syrian Orthodox and the Jewish.

Officially, each *millet* was a separate legal court. The *millet* set and collected taxes for its members. It also applied laws, gave punishments and settled disputes within its religious community. The only exception was when a dispute involved someone from outside the *millet*. If the victim belonged to another religious community, its *millet* had the right to use its laws to settle the case. Islamic law was used whenever a Muslim was involved.

I used to think, now I think

Reflect on your learning about religious tolerance in the Ottoman Empire and complete the following sentences.

- I used to think …
- Now I think …

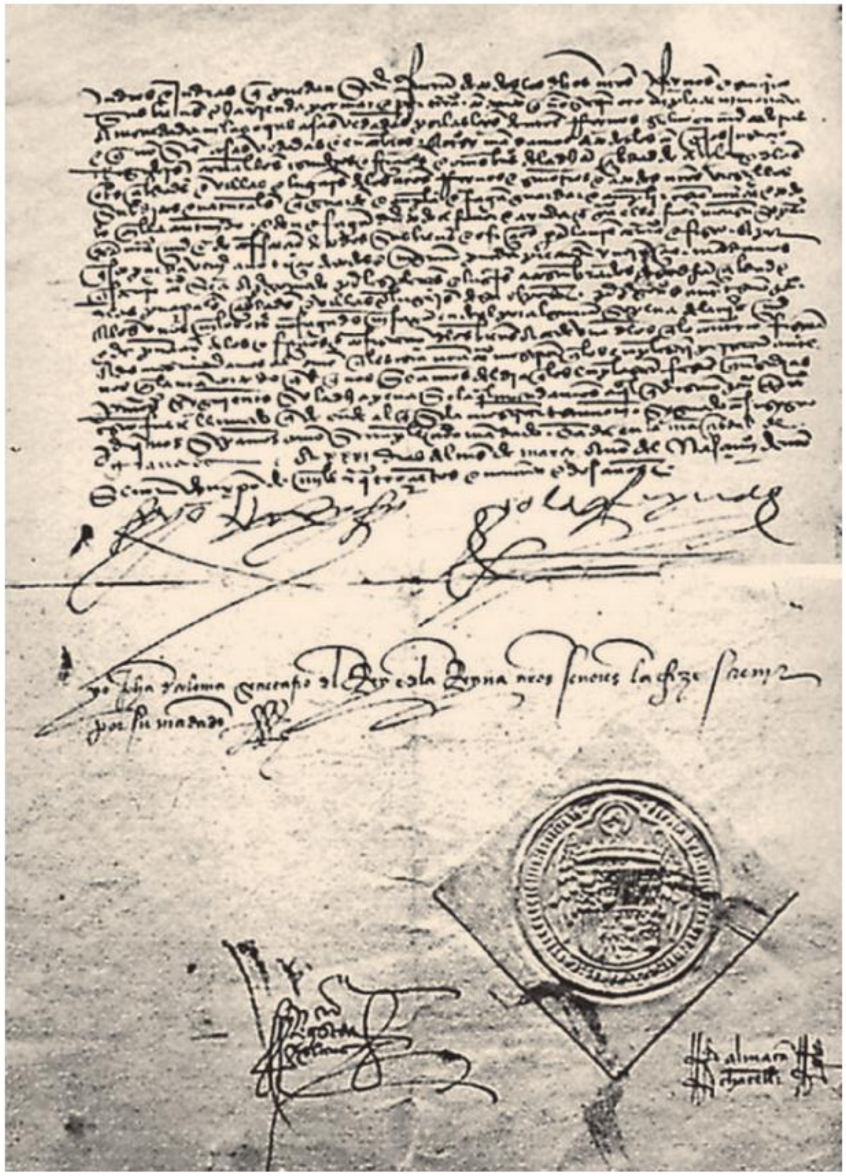
What has changed in your understanding?

The Spanish Inquisition

In the late fifteenth century, the Spanish Inquisition began. The Spanish king and queen set up tribunals of inquisitors (religious officials), who were ordered to convert or expel non-Catholics and to burn witches at the stake.

Thousands of Protestants, Jews and Moriscos (Muslim converts to Christianity) were tortured and killed. In 1492, the king and queen issued the Alhambra Decree, ordering all Jews to leave the kingdom of Spain (see Source 9).

On hearing of this order, Sultan Bayezid II sent ships to Spain. He offered the Jews resettlement within his empire and free practice of their religion under the *millet* system. Many Jews accepted his offer, settling in Istanbul, Salonika in Greece, Cairo and cities in coastal Arabia.



Source 9 The Alhambra Decree of 1492, ordering that the Jews be expelled from Spain

11.7 CHECK YOUR LEARNING

Review and understand

1 **Define** 'forced relocation'.

2 **Describe** the *millet* system. Which were the strongest *millets* under the Ottomans?

3 **Identify** which branch of Islam the sultans followed.

Apply and analyse

4 **Summarise** reasons why Jewish people expelled from Spain would be glad to live within the Ottoman Empire.

5 **Explain** why you think many ordinary people would have been content under the rule of the Ottomans.

6 The Ottoman Empire was considered to be tolerant of other religions. **Explain** how the Ottomans practised this tolerance, using specific examples.

Evaluate and create

7 In groups, **discuss** if religious tolerance is as strong in Australia today as it was in the Ottoman Empire.

Quiz me!
A quick quiz on the Ottomans and the people they conquered

11.8 Ottoman architecture, literature and art

In this topic, you will:

» outline developments in Ottoman culture, such as architecture, literature and fine arts.

As they expanded their empire through conquest, the Ottomans increased their access to trade and opportunities to grow their wealth. Bringing such wealth into the empire gave Ottoman culture the chance to develop.

The period from about 1450 to 1680 is seen as a golden age for the arts in the Ottoman Empire. Architecture, literature and fine arts flourished.

Source 10 The Imperial School of Medicine was the first school of medicine in the Ottoman Empire. It still stands today, on the campus of Marmara University.

Source 11 The Kul-Sharif Mosque in Kazan Kremlin, Russia; Kazan Kremlin is a UNESCO World Heritage Site.

Architecture

Sultans, princesses and grand viziers commissioned many mosques, palaces, religious schools, drinking fountains and alms houses (charitable housing for people in need). They spent significant sums of money on these buildings.

Following the conquest of Constantinople in 1453, Sultan Mehmed II began a great building program. He ordered the magnificent Topkapi Palace to be built in the Iranian style. He also employed the architect Atik Sinan to create a mosque and school buildings on the site of the former Byzantine Church of the Apostles.

Later, Sultan Suleiman I sought to turn Istanbul into the centre of Islamic civilisation by building bridges, mosques and palaces. In 1539, he ordered religious, educational and commercial buildings to be built in honour of his wife Roxelana. These included a mosque, a *madrasa* (religious school), a hospital and a hospice (where terminally ill patients were cared for). In fact, the first-ever hospital was built under Suleiman's rule. Up until that point, doctors visited and treated patients at home. In line with their tolerant ways, the Ottomans believed that all sick people should have access to treatment.

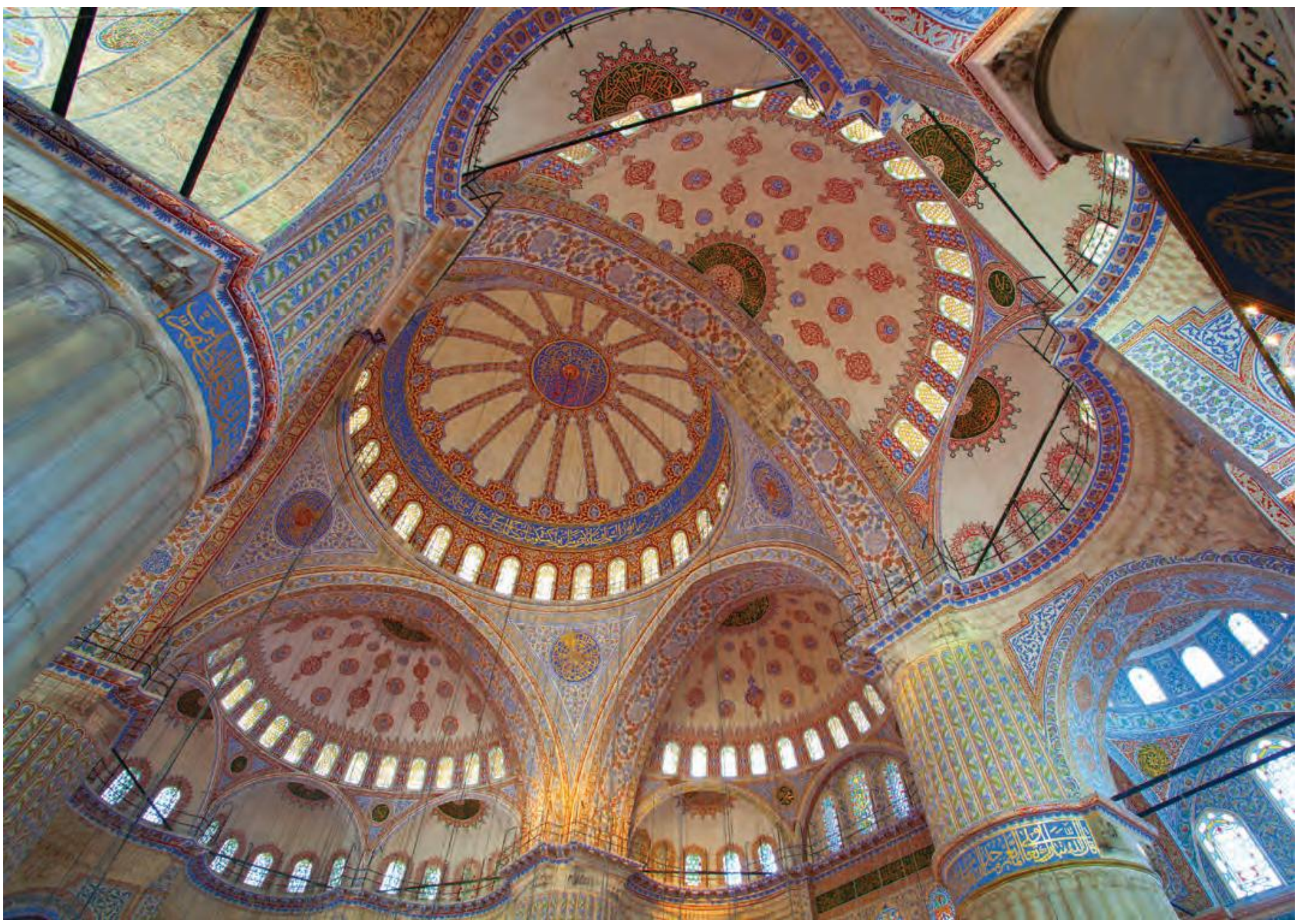
The greatest architect of these times was Mimar Sinan, who was responsible for over 300 monuments throughout the empire. Sinan's two masterpieces were the Suleymaniye and Selimiye Mosques. The Selimiye Mosque was completed in 1575, in Edirne, during the reign of Suleiman's son, Selim II. At its centre is a huge dome, surrounded by two mausoleums (buildings containing tombs), as well as baths, schools and soup kitchens.

Geometric designs

Under the Ottomans, Islamic artists decorated the walls, floors and roofs of important buildings with geometric patterns. They blended lines, shapes, flowers and calligraphy into intricate designs. Artists mostly avoided depicting human figures, believing that it was Allah's privilege to do so and not theirs.

The patterns could be astonishingly complex. Artists tried to balance light and dark. Each part of the pattern was important and had its own meaning. For example, circles represented the beginning of the pattern and Allah himself, or the holy sites of Mecca, Medina and Jerusalem. Triangles, squares and hexagons symbolised human consciousness, physical experience and heaven, in that order.

Explore it!
A virtual field trip to Beyazit Mosque



Source 12 A geometric design on the ceiling of the Blue Mosque

Source 13 This monogram of Sultan Murat III is an example of calligraphy. A monogram is a decorative symbol made by combining two or more letters.

Literature

Literature, and especially poetry, was popular at the Ottoman court. The first Ottoman poet was Ali Asik Pasha (1271–1332), who moved to the empire from Persia (modern-day Iran). Sultans not only rewarded poets with money and gifts, but many of them also wrote poetry themselves. Common themes for poems at this time were love, heroism and death.

The kinds of poetry favoured at court were less popular among commoners. Instead, ordinary people preferred folk tales, which were spread by travelling storytellers and singers. Although the printing press was invented in Western Europe in the fifteenth century, printed books were rare. No books were printed in the Ottoman Empire until 1726. The art of calligraphy (decorative handwriting) was promoted instead.

Fine arts

The Ottomans also developed a flourishing culture of creative arts, including calligraphy and painting, that was highly regarded in other parts of the world.

Calligraphy

Calligraphy developed into high art under the Ottomans. The Muslim holy book, the Qur'an, was passed down to each new generation in carefully handwritten copies. Making these copies was one way of earning religious merit.

One of the reasons that the Ottomans preferred this method of copying to using a printing press was that any mistake by the copier only appeared once; while a printing press could duplicate a single mistake many times. Many Ottoman scholars were also concerned about the survival of calligraphy. They saw the arrival of ugly printed texts as a threat to the beauty of this artform.

Almost every Islamic building had some form of calligraphy inscribed on it. Often, this was a verse from the Qur'an or lines of poetry.

See, think, wonder

Look at Source 13.

- What do you see?
- What do you think?
- What do you wonder?

Miniatures

Ottoman miniatures were tiny paintings executed with great skill. The most notable artists were Kinci Mahmut, Kara Memi and Nigari. Many artists would work together on a single miniature. A head painter drew the main outlines with thin brushes, and then his assistants filled in the parts. The design was usually symmetrical and illustrated important events from the empire's history (see Source 14).

Quiz me!

A quick quiz on Ottoman architecture, literature and art

Source 14 This Ottoman miniature depicts the Battle of Mohacs between the Ottomans and the Hungarians in 1526. The miniature is detailed enough to show the heavily armoured knights and horses of the Hungarian army and the artillery that was used. The miniature also shows the infantry and calvary of the armies.

11.8 CHECK YOUR LEARNING

Review and understand

1 **Identify** the two mosques that are considered to be architect Mimar Sinan's masterpieces.

2 **Outline** why the period from 1450 to 1680 is seen as a golden age for the arts in the Ottoman Empire. Include some of the cultural developments that made this period so significant.

Apply and analyse

3 **Explain** why Islamic artists avoided depicting human figures in their work. What does this tell us about their relationship with Allah?

4 **Summarise** why Ottoman scholars preferred copying books by hand, rather than using printing presses.

Evaluate and create

5 Find some examples of Islamic geometric designs. **Create** your own geometric design that includes triangles, squares and hexagons.

6 **Research** Istanbul today to create an itinerary for a tour of the city. The tour should showcase the city's buildings, including its mosques and bazaars.

11B RICH TASK

Ottoman power on land and sea

Quizlet
Revise the key terms you have learnt so far.

Until the late seventeenth century, the Ottoman military forces rarely faced defeat in battle. A number of factors helped to make them so successful.

Unlike many European rulers at the time, the Ottoman leaders maintained a permanent paid army (from the early fourteenth century onwards). Paying soldiers to train as well as fight encouraged loyalty and discipline. Ottoman soldiers were also well armed, and were early users of gunpowder and firearms.


Source 15 A sixteenth-century illustration of Ottoman Janissaries

The military was also recruited from both Muslim and non-Muslim groups, which meant that the sultan could send his forces to any part of the empire without having to worry about their willingness to fight.

The most famous of the Ottoman fighting forces were the Janissaries, the sultan's elite infantry troops. They protected the sultan during battle, and acted as household troops and bodyguards during times of peace. For centuries, the Janissaries were the best-trained, best-armed fighting force in the Mediterranean world.

The six divisions of cavalry (soldiers mounted on horseback) were the other elite forces of the Ottoman Empire. They were known as the *sipahis*. Like European knights, they were landholders who, in return for their land, offered their military service to the sultan. They were made up of ethnic Turks, and acted as the sultan's mounted guard.

Tactics and the use of firearms

The sultan took personal command of his armies during battle. He commanded his forces from a safe position, guarded by gun-wagons and artillery (mounted guns). Janissaries armed with arquebuses (an early type of gun) surrounded him as his personal guard. The infantry stood in front of the artillery, and on each side were armoured cavalry. Reserve soldiers protected the baggage, which was carried at the rear.


Source 16 The Ottoman fleet depicted in the Battle of Lepanto, 1571

The *sipahis* had the job of drawing the enemy towards the infantry. The infantry were meant to take any initial attack, and then move aside so that the artillery and Janissaries could open fire. Once this had happened, the *sipahis* would surround the remaining enemy and defeat them.

Control of the seas

During the fifteenth and sixteenth centuries, the Ottoman navy dominated the eastern Mediterranean and the Red Sea. The Ottomans used the wealth they gained from conquest and trade to build shipyards, which were scattered around their empire. Sultan Mehmed II led a navy of 126 ships against Constantinople when he conquered the city in 1453. By the mid-1500s, more than three times that number could be built by the Ottomans in any given year.

Cost was not an issue. After a naval defeat in 1571, the sultan asked his grand vizier whether it would cost much to replace the fleet. Grand Vizier Sokollu Mehmed Pasha replied: 'The might and wealth of our empire are such, that if we desired to equip the entire fleet with silver anchors, silken rigging, and satin sails, we could do it.'

Practise the skill

1 Working in groups, conduct further research and **create** a presentation on one of the following topics:

- a **Explain** how Ottoman military tactics and the use of firearms allowed the Ottomans to expand their empire over the course of centuries.
- b **Explain** how Ottoman naval power allowed them to dominate the Mediterranean for centuries, and give examples of their naval successes and exploits against European rivals.

Extend your understanding

1 **Research** the Barbarossa brothers, who were renowned pirates. Create a presentation about their characters and activities, and the times and places in which they operated. Explain the impact of their activities on the Ottoman Empire.

KEY SKILL
Communicating & reflecting

Creating and presenting an audiovisual presentation

A popular way to present the findings of historical research is to create an audiovisual presentation. To prepare a successful presentation, follow these steps:

Step 1 Make sure you have collected everything that you have found out in your historical research. This will include a list of sources you have used and a range of relevant images. If working in a group, collate your research with the other members of your group.

Step 2 Decide on the best way to deliver your findings. You may choose to use Microsoft PowerPoint or Prezi. Or you may like to create a website or a short film. How you will present your findings may depend on the criteria set by your teacher.

Step 3 When delivering your presentation, keep the following in mind:

- Rehearse your presentation, especially if you are working in a group. Make sure each member of the group knows exactly what they have to do.
- Make a back-up copy of your presentation in case anything unexpected occurs, such as loss of data.
- Engage with your audience. Make eye contact, do not read from your notes, and prepare cue cards to help you remember your lines. Speak clearly, and make sure your text and layout is as visually appealing as possible.
- Make sure all your material is correct and contains no factual or spelling errors.
- Speak slowly, focus on the purpose of your presentation, and do not allow yourself to be distracted.
- Finish your presentation on a high note.

For more information on this key skill, refer to page 218 of 'The history toolkit'.

11.9 The Black Death

> **In this topic, you will:**
> » map the origins of the Black Death in the fourteenth century
> » analyse the causes and effects of the Black Death in Europe and Asia.

The Black Death was a highly infectious **plague** that spread across Asia, Europe, North Africa and the Middle East from around 1330 to 1351, killing an estimated 100 million people. This represents an average of 30 per cent of the population in these areas.

Source 1 *Yersinia pestis* bacteria – the bacteria that lived in the stomach of fleas and caused the Black Death

Causes and symptoms

plague
a widespread disease with a high death rate

The disease became known as the Black Death because of the black lumps (known as buboes) that appeared on the skin of victims. It was transmitted by infected fleas carried by rats. Rats were very common in the dirty, crowded conditions of the towns in the medieval period. When a rat carrying fleas died from the Black Death, the fleas would jump onto a person to feed from their blood. The person bitten by the fleas would then be infected.

ORIGINS AND SPREAD OF THE BLACK DEATH

1. The Black Death breaks out in China in the early 1300s.

2. As people and goods travel along the Silk Road, so does the Black Death.

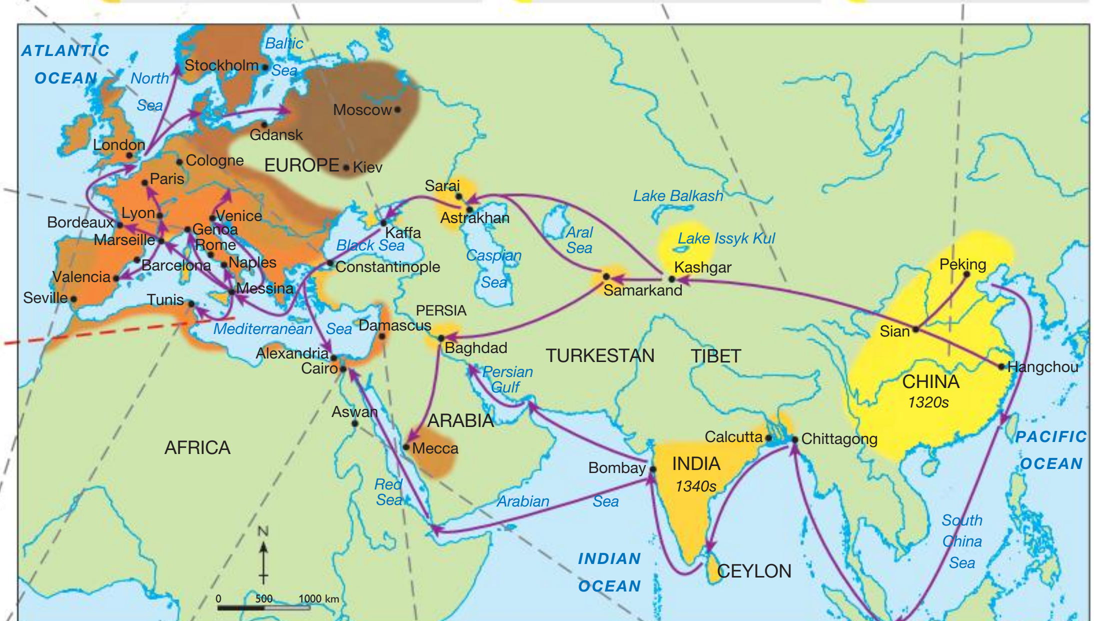
3. In 1346, Tatar troops become infected while attacking Kaffa, and spread the disease.

4. Genoan merchants flee from Kaffa in their ships back to Italy, docking at Constantinople on the way. They are carrying rats on board.

5. The merchant ships land in Genoa, spreading infection.

6. In 1347, infection rapidly spreads through the ports on the Mediterranean Sea.

7. In 1348–49, the Black Death spreads northwards across Western Europe, reaching England.



8. In April 1348, it reaches Tunis from Sicily and advances along the Northern African coastline.

9. In 1348, 1000 people are dying per day in Alexandria. In Cairo, 200 000 die – over a third of the population.

10. By April 1348, the Black Death reaches Palestine and Syria, killing 50 000 people in Damascus in one year around half of the population.

11. By 1349, the Black Death has travelled through the Nile Valley via boats to Aswan, 1000 km away.

LEGEND
- After 1350
- 1350
- 1349
- 1348
- 1347
- 1346
- Before 1346
- Direction and path
- City with recorded outbreak

Source 2

Source: Oxford University Press

The buboes would spread all over the body. The victim would also get a fever and headaches. Over the following few days, the victim would lose motor control (the ability to move voluntarily), so that they could not speak or walk properly. They would suffer much pain and vomiting, and become delirious (meaning they lost control of their emotions and were unable to think or speak clearly).

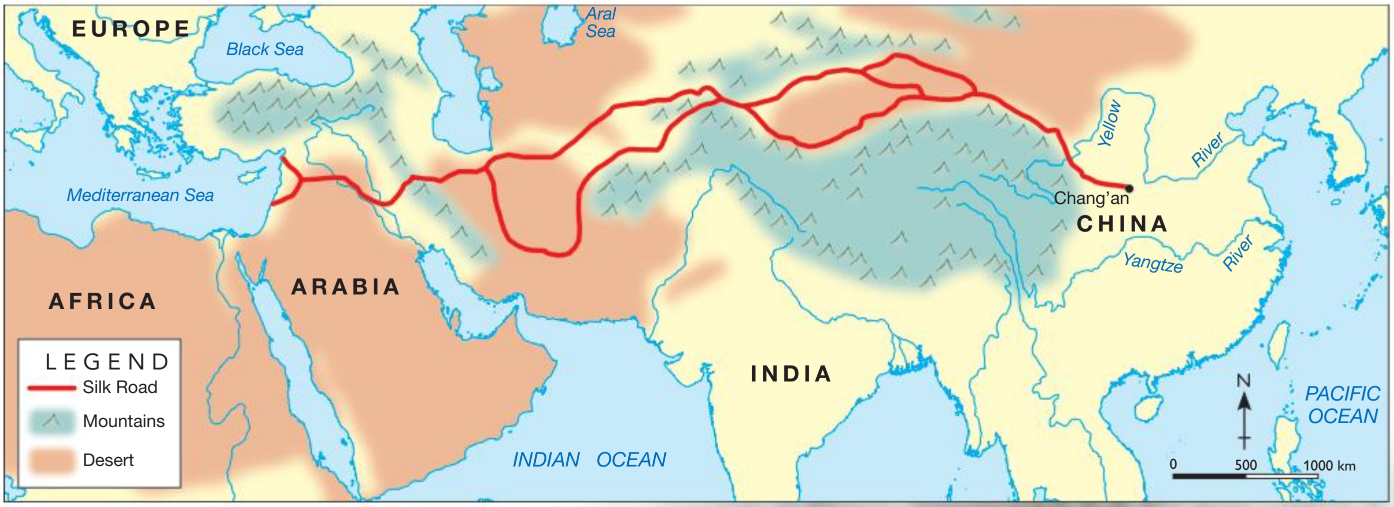
The average time of death was between three and seven days from the first symptom. It is believed that between 50 and 75 per cent of those who caught the Black Death died.

Spread of the Black Death

The movement of people is thought to be mainly responsible for the Black Death's spread. The plague seemed to move along the important east–west trade routes that linked China with Europe through central Asia (see Sources 2 and 3). Increased trading along overland and sea routes – as well as a lack of medical knowledge, plus filthy living conditions, superstitions and fear – helped the disease to spread quickly.

Quiz me!
A quick quiz on the Black Death

TRADING ROUTES



Source 3

Source: Oxford University Press

Effects of the Black Death

With no written records, the effects of the Black Death on Eastern societies, including the emerging Ottoman Empire, are not as well understood as they are for Europe. However, many of the effects suffered in Europe would also have been felt in other regions of the world affected by the disease.

Some effects were immediate and obvious, such as bodies lying in the streets. Others were slower, such as the long-term effects on the economy and politics of society.

Short-term effects

The Black Death caused a huge labour shortage in towns and on farms. Many workers had died or run away. Rubbish and raw sewage in the streets of medieval towns – common enough even before the plague – became worse. Abandoned houses were left dirty and untended, and muck in the streets piled up. There were few people to tend to the disrepair, even if they had wanted to. Tradespeople and craftspeople died along with cleaners, magistrates and officials.

Source 4 This detail from the *Isenheim Altarpiece* by Matthias Grünewald (*c.* 1480–1528), known as 'Suffering Man', illustrates why the Black Death caused such fear and horror.

People were dying so quickly, and in such large numbers, that there was no time for proper burials or religious ceremonies. Mass burials became common, with corpses shovelled into large pits and covered with earth.

Long-term effects

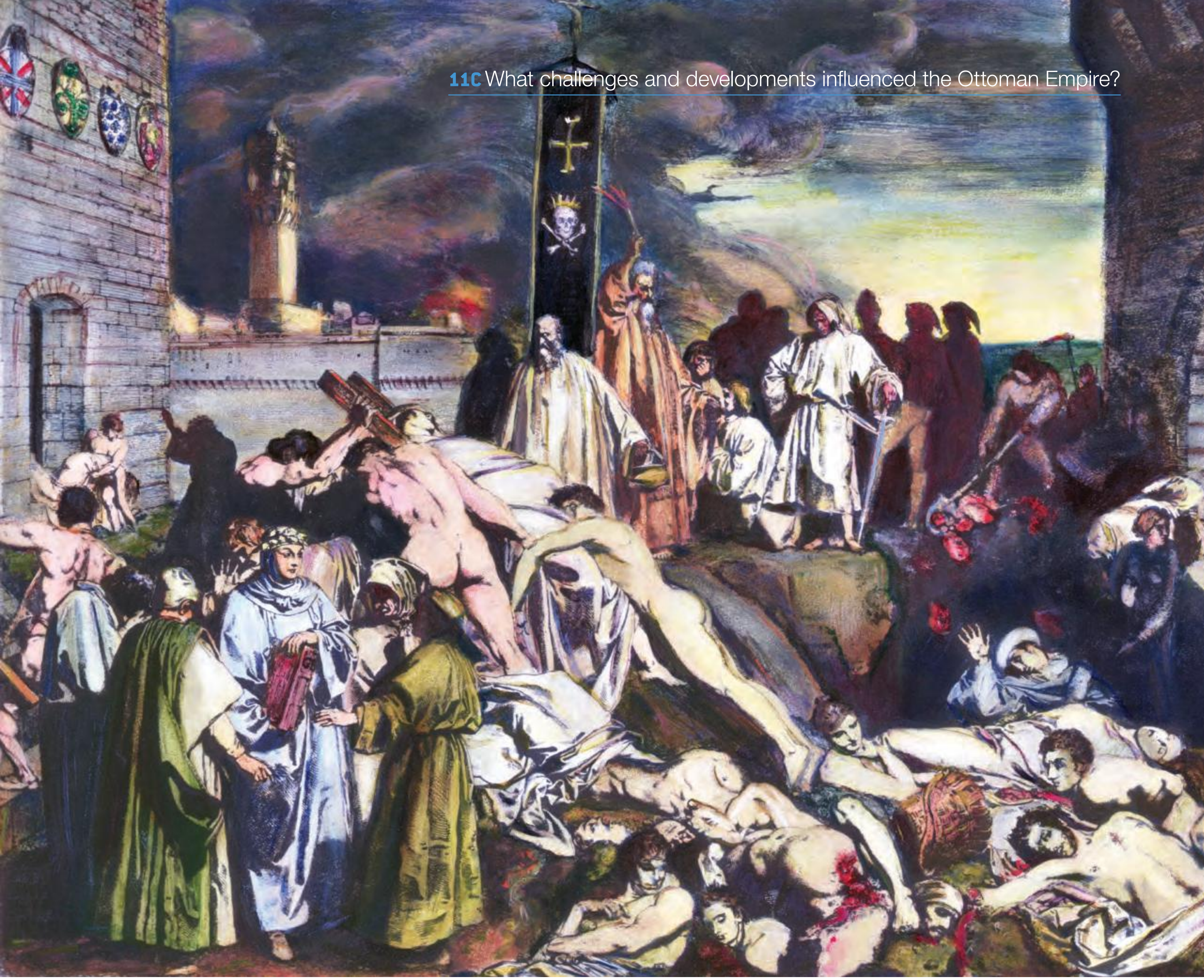
The massive drop in population drastically affected trade, manufacturing and the production of food on the land. Skilled labourers and craftspeople were now in short supply and therefore had more bargaining power with their employers. Consequently, their social status improved.

One long-term effect on African society was the start of the slave trade. Africans from the Sahara region began to be taken as slaves in the fourteenth century, to boost Europe's greatly reduced labour force.

Effects on the Ottoman Empire

Historians believe that the emerging Ottoman Empire was less affected by the Black Death, because at that stage the Ottomans were mostly nomadic groups that were constantly on the move. They still suffered casualties, but the plague seemed to affect cities and settled populations the most. To some extent, the Black Death even helped the Ottomans conquer new territories.

One example is the Ottoman push into neighbouring Byzantine territory. The Black Death reached the Byzantine Empire – including Constantinople – in 1347, killing a large proportion of the population. This catastrophe made them vulnerable to invasion. The Ottomans took advantage of this to steadily advance into Byzantine territory, eventually taking Constantinople in 1453.



Source 5 An eighteenth-century artist's impression of a mass burial during the Black Death in Florence, Italy

11.9 CHECK YOUR LEARNING

Remember and understand

1 **Describe** why the fourteenth-century plague was called the Black Death.

2 **Outline** what caused the Black Death.

Apply and analyse

3 **Summarise** the main factors that contributed to the Black Death's rapid spread.

4 In a short paragraph, **summarise** how the Black Death might have affected families and communities. Make sure you consider the economic and social implications.

5 **Explain** why historians believe that the Ottoman Empire was not as affected by the Black Death as other medieval societies.

6 a Create a table that **summarises** the short- and long-term effects of the Black Death on medieval societies.

b **Analyse** these short- and long-term effects. Remember, when you analyse something, you need to break it down into smaller parts and talk about how they relate to each other. Think about how the short-term effects led to long-term effects, and what this meant for societies at the time.

11C

RICH TASK

Quizlet

Revise the key terms you have learnt so far.

The consequences of population loss

The Black Death had complex and far-reaching effects around the world. One of the most obvious and immediate consequences was the massive loss of life, which affected all aspects of society, culture and the economy.

Source 6 describes just one way that people responded to the Black Death.

Source 6

It was thought that the people … having seen the extermination of their neighbours and of all the nations of the world … would become better, humble and virtuous and catholic, avoiding iniquities and sins and overflowing with love and charity for one another … The opposite happened. Men, finding themselves few and rich by inheritances and successions of earthly things, forgetting the past as if it never was, gave themselves to more disordered and sordid behaviour than ever before.

Observations written in the fourteenth century by the Italian chronicler Matteo Villani, son of a respected merchant family in Florence

KEY SKILL
Analysing cause & effect

Creating a concept map

Graphic organisers are very useful tools for historians because they can help to compare a range of sources and identify connections between events. One of the simplest and most effective ways to explore connections between events is to create a concept map. Concept maps are very simple to create, and will help you organise your thoughts and more easily identify the causes and effects of different events.

To create a concept map, follow these steps:

Step 1 Identify the topic or event that you are interested in exploring.

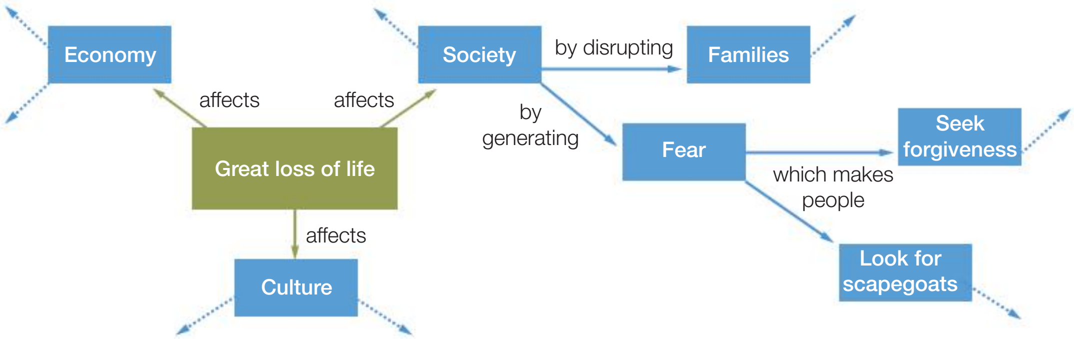
Step 2 In the centre of a large sheet of paper, write down this topic and draw a circle around it.

Step 3 Brainstorm the main ideas that relate to the topic and write them around the central idea. Draw circles around each of these ideas and connect them to the main topic. Keep the concepts as concise as possible.

Step 4 Continue to brainstorm more ideas, and connect them to relevant topics. More important ideas should be put nearer to the centre, and less important ones closer to the edges. Identify the relationship between the concept groups by using a range of different colours. You can also make different connections clearer by using arrows or dotted lines.

Step 5 After you have finished work on your concept map, look carefully at the way it is organised. Check to see that nothing is missing, and that each group of connected ideas is organised logically.

For more information on this key skill, refer to page 208 of 'The history toolkit.



Source 7 An example of a concept map on the effects of population loss following the Black Death

Practise the skill

1 Copy the concept map that has been started for you in Source 7, on the consequences of population loss following the Black Death. Complete it in your notebook, or on a computer using a mind-mapping or drawing program. Make your concept map as big as you can.

To generate ideas, you will need to use your own knowledge, information from this chapter and some further research. As you **construct** your concept map:

- think of all the logical consequences of each idea
- as you draw an arrow to a new concept bubble, try putting words on the arrow that make a sentence (e.g. Great loss of life – *affects* – Society – *by generating* – Fear)
- draw arrows between concepts on different parts of the map if you see a link
- use colours to categorise your concept bubbles into sensible groupings once you finish
- create a key to explain what the colours mean.

When you have completed your concept map, **compare** it with a classmate's to see what further ideas you can add. Your final concept map will give you a clearer picture of the many effects of population loss.

Extend your understanding

The consequences of such a large proportion of the population dying were profound.

1 Imagine you are a medieval peasant who has survived the Black Death. Many in your village were not so lucky. The churchyard is full of new graves, houses are empty, and hungry animals roam the roads and fields. No one is working, and the crops need to be harvested or they will soon begin to rot. For the first time, you see how important you and your work are. Without your labour and farming knowledge, the lord and his family will not have food to eat.

Create a speech to deliver to your lord, requesting better conditions and pay. Consider the following:

- what you will ask for and why
- the evidence you will use to convince your lord to agree
- the tone you will use – for example, will you choose to present your demands reasonably, or use threats to get what you want?

Source 8 A painting showing farm workers on a manor, soon after the Black Death

11 CHAPTER REVIEW

Review questions

11A How was society organised during the Ottoman Empire?

1 In your own words, **define** 'caliph'. (1 mark)

2 **Summarise** the practice of *devsirme*. (3 marks)

3 The Ottomans believed that the sultan should only answer to Allah. **Discuss** the strengths and weaknesses of this belief in relation to rule of the Ottoman Empire. Use specific examples in your answer, and be sure to provide your own opinion. (6 marks)

(Total: 10 marks)

11B What were the most significant achievements of the Ottoman Empire?

1 **Describe** the geometric designs that the Ottomans developed. (2 marks)

2 **Outline** the role of the Janissaries. (2 marks)

3 Discuss two key achievements that occurred during the rule of Suleiman I (1520–66) and **determine** (decide) which of these achievements was the most helpful to the expansion of the Ottoman Empire. (6 marks)

(Total: 10 marks)

11C What challenges and developments influenced the Ottoman Empire?

1 'The Black Death helped the Ottoman Empire more than it harmed it.' **To what extent** do you agree with this statement? A lot (strongly), a little bit (somewhat) or not at all? Write a short paragraph explaining your position.

In your response, consider the timing of the Black Death and the likely short-term and long-term effects. (10 marks)

(Total: 10 marks)

Review activity

Read the paragraphs below and respond to the questions that follow.

The Istanbul Observatory

Similar to other Islamic cultures, the Ottoman Empire held education and learning in very high regard. The study of sciences in the *madrasas* (religious schools) led to discoveries and advances in medicine, mathematics, physics and astronomy (the study of outer space, planets, moons and stars).

One scholar, Taqi ad-Din Muhammad ibn Ma'ruf (1526–85), constructed mechanical clocks, a parallactic ruler (that calculated how high celestial bodies were in the sky) and an armillary sphere (a model of objects in outer space). He and his team at the Istanbul Observatory used these inventions to calculate the coordinates of the stars. Taqi ad-Din also studied European clocks, and constructed a clock that would tell prayer times precisely. Historians refer to him as a polymath (a person who has expert knowledge in many subjects).

Source 9 The Istanbul Observatory

1 **Define** polymath. (1 mark)

2 **Identify** two scientific instruments in Source 9. (2 marks)

3 In your own words, **explain** the use of each scientific instrument identified in question 2. (6 marks)

4 a **Explain** the significance of the clock that told prayer times. (3 marks)

b **Suggest** what this reveals about the connections between science and religion in the Ottoman Empire. (4 marks)

5 Using your knowledge of the Ottoman Empire, **analyse** the historical significance of Taqi ad-Din Muhammad ibn Ma'ruf's scientific achievements. (4 marks)

(Total: 20 marks)

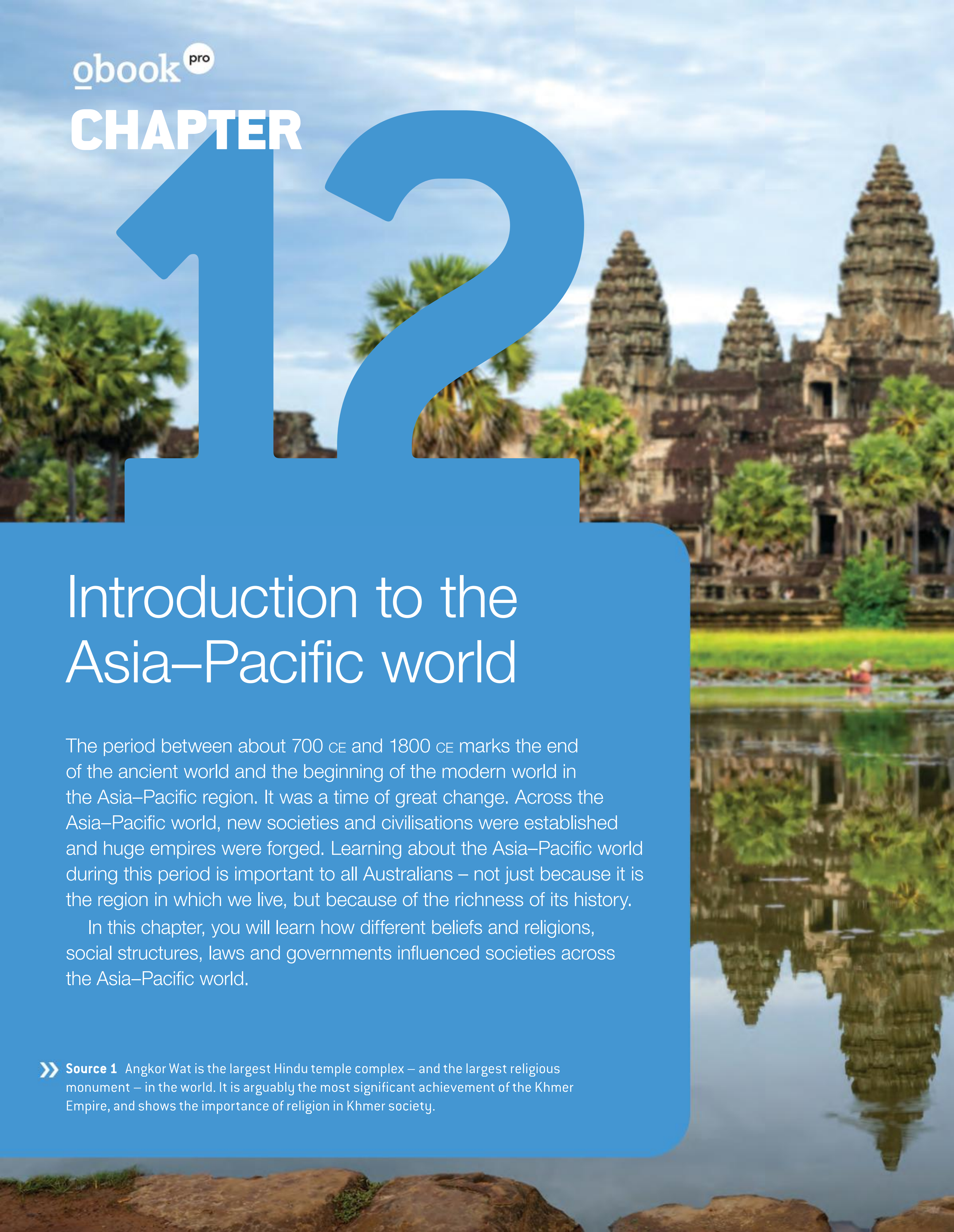
Check your Student obook pro for these digital resources and more:

Student book questions
Chapter 11

Key skill worksheet
Communicating & reflecting: Chapter 11

Quizlet
Play a game of Quizlet on The Ottoman Empire.

Chapter review quiz
Chapter 11



CHAPTER 12

Introduction to the Asia–Pacific world

The period between about 700 CE and 1800 CE marks the end of the ancient world and the beginning of the modern world in the Asia–Pacific region. It was a time of great change. Across the Asia–Pacific world, new societies and civilisations were established and huge empires were forged. Learning about the Asia–Pacific world during this period is important to all Australians – not just because it is the region in which we live, but because of the richness of its history.

In this chapter, you will learn how different beliefs and religions, social structures, laws and governments influenced societies across the Asia–Pacific world.

Source 1 Angkor Wat is the largest Hindu temple complex – and the largest religious monument – in the world. It is arguably the most significant achievement of the Khmer Empire, and shows the importance of religion in Khmer society.

12A

Where and when did civilisations in the Asia–Pacific world develop?

12B

What were the key features of societies in the Asia–Pacific world?

The Asia–Pacific world

This unit offers a choice of four topics:

- The Khmer Empire (available on obook pro)
- Mongol expansion (available on obook pro)
- Japan under the shoguns
- The Polynesian expansion across the Pacific (available on obook pro).

You must choose *at least one* of these topics for study.

12.1 The where and when of the Asia–Pacific world

In this topic, you will:

» explore the origins of different civilisations throughout the Asia–Pacific world.

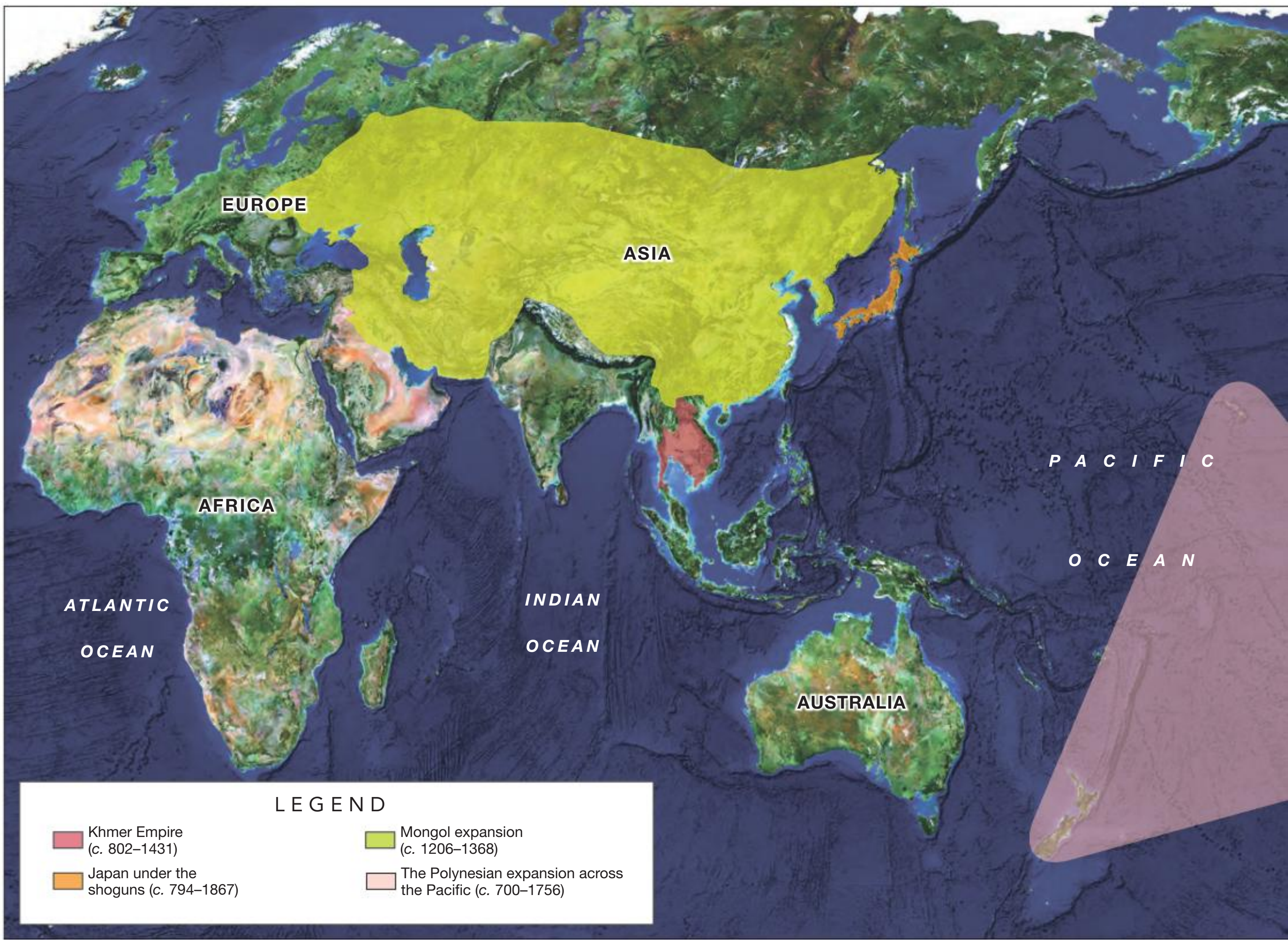
Sequence this! Civilisations across the Asia–Pacific world

In this unit, you will be learning about different civilisations and events that took place across the Asia–Pacific world. To help you get a better understanding of these civilisations and events, it helps to look briefly at some common factors that influenced each civilisation and to think about how their development was linked.

The satellite image of the world in Source 1 shows the location and size of the civilisations you may be learning about in this unit:

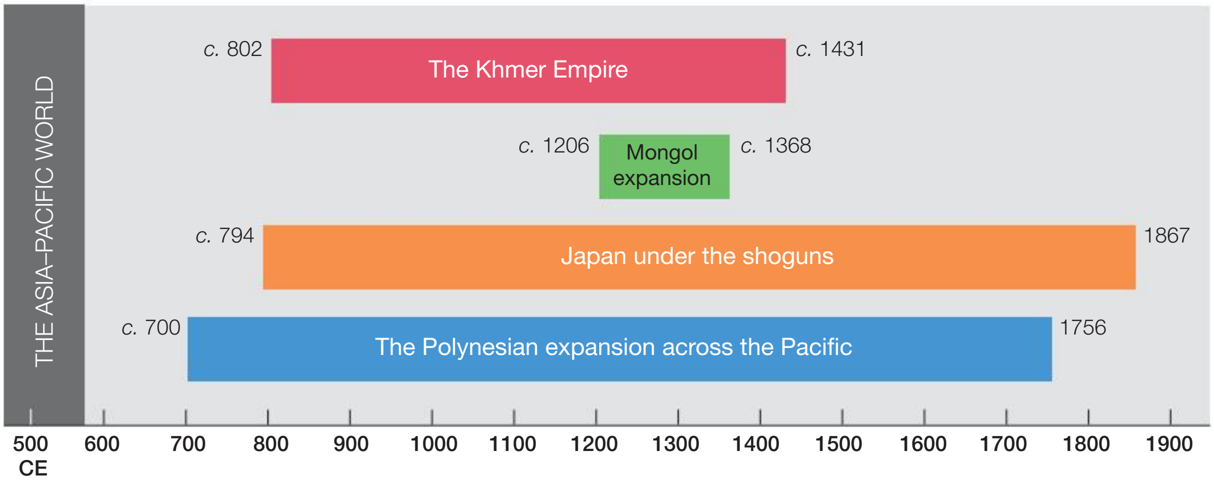
- the territories of the Khmer Empire when it was at its greatest size
- the territories of the Mongol Empire when it was at its greatest size
- the islands of Japan
- the thousands of islands in an area of the Pacific Ocean settled by Polynesian peoples (known as the Polynesian Triangle).

ASIA–PACIFIC WORLD: KEY CIVILISATIONS



Source 1 This satellite image of the Earth shows the location and size of key civilisations across the Asia–Pacific world when they were at their peak.

The dates for each civilisation are shown in the timeline (Source 2). Unlike civilisations in the European and Mediterranean world, the civilisations in the Asia–Pacific world all existed around the same time. This was possible because they all inhabited separate territories across a vast area.



Source 2 This timeline shows the rise and fall of civilisations across the Asia–Pacific world.

Source: Oxford University Press

12.1 CHECK YOUR LEARNING

Review and understand

1 Look carefully at Source 1 and complete the following tasks:
   a The Khmer Empire was located in an area we now refer to as South-East Asia. **Identify** the country in South-East Asia in which it was located.
   b **List** the four civilisations in the Asia–Pacific world in order of geographic size.

Apply and analyse

2 **Describe** Australia's geographic location in relation to the civilisations shown on the map.

Evaluate and create

3 The area of the Pacific Ocean that was explored by the Polynesians is known as the Polynesian Triangle. Using the internet, **research** the groups of islands that form this triangle and create a list of them.

12.2 Key features of societies in the Asia–Pacific world

In this topic, you will:

» explore the key features of the Asia–Pacific world, including belief systems and religions, and government, laws and social structures.

Quiz me!
A quick quiz on key features of societies in the Asia–Pacific world

In this unit, you will study *one* of the following topics:

- The Khmer Empire
- Mongol expansion
- Japan under the shoguns
- The Polynesian expansion across the Pacific.

Before beginning a detailed study into your chosen civilisation, it helps to look briefly at some key factors that influenced all the societies across the Asia–Pacific world. It is useful to look at the types of belief systems and religions that were important to each one, as well as the systems of government, laws and social structures that influenced their development.

Belief systems and religions

Belief systems and religions formed the foundations of all societies across the Asia–Pacific world. The principles underpinning these belief systems, and the religious teachings that went along with them, influenced almost every aspect of life. The belief systems of many societies across the Asia–Pacific region had one thing in common – they were based around a belief in spirits of the natural world.

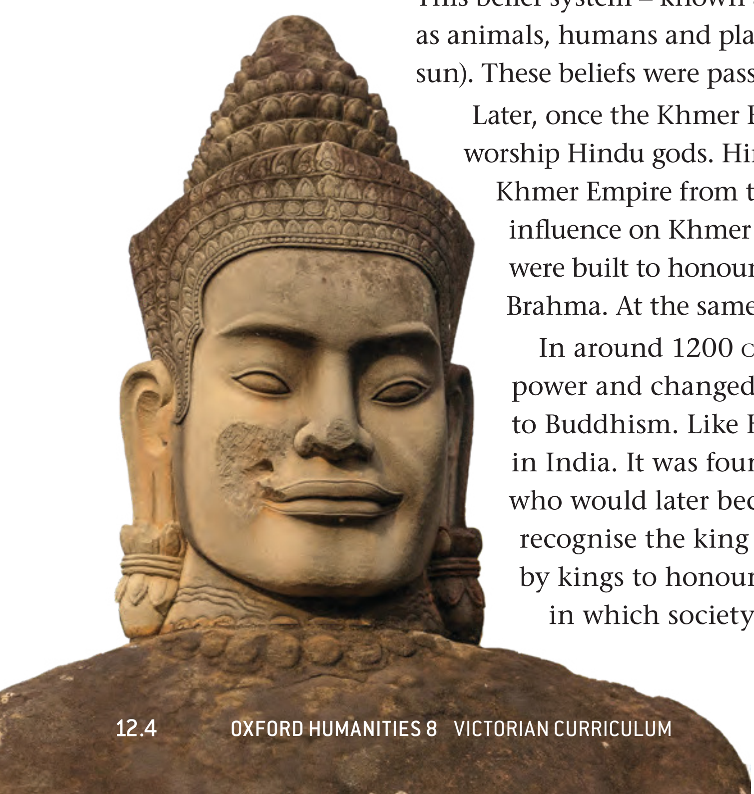
The Khmer Empire

More than any other single factor, religion had the greatest influence on the development of the Khmer Empire. Long before the rise of the Khmer Empire, the traditional people in this part of South-East Asia worshipped spirits of the natural world. This belief system – known as animism – involved the worship of all living things (such as animals, humans and plants), as well as natural events (such as the wind, rain and sun). These beliefs were passed from one generation to another through word of mouth.

Later, once the Khmer Empire had been established, the Khmer people went on to worship Hindu gods. Hinduism first developed in India and was introduced to the Khmer Empire from the ninth century CE onwards. Hinduism had a significant influence on Khmer society. Between around 800 and 1200 CE, beautiful temples were built to honour the three most important Hindu gods: Shiva, Vishnu and Brahma. At the same time, Khmer kings were regarded as living gods.

In around 1200 CE, a Khmer king by the name of Jayavarman VII came to power and changed the official religion of the Khmer Empire from Hinduism to Buddhism. Like Hinduism, Buddhism was a belief system that originated in India. It was founded by an Indian prince named Siddhartha Gautama – who would later become known to his followers as Buddha. Buddhism did not recognise the king as a living god. This reduced the number of temples built by kings to honour themselves and their Hindu gods. It also changed the way in which society was organised.

Source 1 Across Asia, religions such as Buddhism and Hinduism quickly became an important part of daily life. This statue in modern-day Cambodia shows the significance of Buddhism in the Khmer Empire.



Mongol expansion

Before the formation of the Mongol Empire in around 1206, **nomadic** tribes of animal herders across central Asia worshipped spirits of the earth and sky – a belief system known as shamanism.

nomadic
a society of people who do not live in a set place but move around, usually in search of food and shelter, and good pasture for their animals

Spiritual leaders (called shamans) were believed to be messengers between the spirit world and the human world. Shamans could be men or women of any age – even young children. In many Mongol tribes they were important members of society. Shamans were believed to be able to communicate with the spirit world, interpreting messages from dead ancestors, performing healing rituals and predicting the future. Because the Mongols were a nomadic people, in the early days of the empire there were no temples or permanent places of worship.

Although most Mongols believed in shamanism, this was not one of the driving forces behind the growth of the empire – in fact, its rapid expansion was based more on a need for resources (such as grain and metals) and access to pastures for animal grazing.

Source 2 A modern-day Mongolian shaman making an offering to the spirits

The Mongols were very tolerant of different religions and races. Over time, religious missionaries spread the religions of Buddhism, Christianity, Islam and Judaism throughout different parts of their vast empire. Under the rule of Genghis Khan (the founder of the Mongol Empire), institutions were set up to ensure religious freedom. As new territories were conquered, religious leaders were allowed to continue practising their own beliefs. In order to win the support of the people, these religious leaders were not taxed. Confucian scholars and Tibetan Buddhist monks also acted as court advisers.

Japan under the shoguns

Like the Polynesians (see page 12.7), the indigenous people of Japan worshipped nature and *kami* (divine spirits). The early Japanese believed that all natural things were inhabited by these natural spirits, who took the form of things necessary for life, such as the sun, hills, lakes, mountains, rivers and trees. The spirits were also responsible for things like fertility. After they died, people in Japan were believed to become *kami*. These people were then worshipped by their families.

Over time, these beliefs developed into a more formal Japanese religion known as Shinto. Shinto shrines were built across Japan, and the emperor of Japan was worshipped as a god.

Another similarity between Shinto and Polynesian beliefs was the telling of creation stories. One Shinto creation story tells of two gods placing a spear into the ocean. When it was withdrawn, water drops fell from the spear, forming the islands of Japan (see topic 15.2 on page 339).

In the fifth century CE, Buddhism was introduced to Japan from China. From this point on, Shinto and Buddhism were both followed by Japanese people; but from the eighth century onwards Buddhism became the state religion, and Buddhist temples were built all across Japan.

Between the sixth and ninth centuries CE, Confucianism was also introduced from China. Confucianism had a positive impact on ethics (morals) and politics. Finally, Christianity was brought to Japan in 1549 by Christian missionaries. At first, Christianity was tolerated, but later it was banned. It reappeared in 1859, and promoted social reform and justice in Japan.

Source 3 Shinto shrines like this one in the city of Kyoto can be seen all over Japan today. Shinto is a Japanese religion that developed out of a belief in spirits of the natural world.

The Polynesian expansion across the Pacific

The Polynesians are a group of people whose civilisation expanded over a vast area of the Pacific Ocean, and they settled thousands of islands between 700 and 1756 CE. This area of the Pacific Ocean became known as the Polynesian Triangle. The points of the triangle are formed by the islands of Hawaii, Rapa Nui (Easter Island) and Aotearoa (New Zealand).

As Polynesians spread throughout the region, they formed many different societies on many different groups of islands. Each had its own belief system and religion, but there were some common features. All Polynesian cultural groups worshipped multiple gods and spirits. Like the spirits of early Japanese beliefs, these spirits were believed to be responsible for the Earth's natural features and processes, including the wind, rain, sun, moon and stars. Each cultural group passed down creation stories that explained how these important elements – such as the sun – came to be. Polynesians also worshipped their ancestors. They created rituals to please the gods, so that food was plentiful and women would give birth to healthy children.

Source 4 Polynesian societies across the Pacific Ocean shared many beliefs about gods and the creation of the world. Many Polynesian societies during this period made representations of these gods in the form of large wooden *tikis* (carved figures), like the ones shown here.

Over time, a group of spiritual guides and priests developed in many Polynesian societies. Some priests made offerings to the gods – such as human sacrifices – to ensure protection, good fortune and healthy crops.

One Polynesian cultural group that settled the islands of New Zealand was the Māori. Spirituality had a significant impact on the way Māori societies and culture developed. Their beliefs shaped how they lived and the rituals they performed. How the Māori managed the use of their resources, and the arts and crafts they produced, clearly reflect the importance of spirituality in their everyday life.

From the early 1800s, European and American missionaries moved throughout the Polynesian Triangle, trading and converting the islanders to Christianity. These Christian missionaries transformed all aspects of Polynesian beliefs and customs to make them more 'civilised'. In many cases, they destroyed traditional belief systems and replaced them with Christianity.

Governments, laws and social structures

Although the ways in which societies across the Asia–Pacific world were organised was quite different, there were some important similarities. Broadly speaking, all three societies were made up of a number of social groups organised according to a strict **hierarchy**. Power was often controlled by those at the top of the hierarchy; for example, a king, a tribal or military leader, or a priest.

hierarchy
a social structure that organises people, with the most important group on top and others ranked beneath in decreasing order of importance

The Khmer Empire

kingdoms
regions ruled by a king or queen

castes
social groups into which a person is born; castes are part of a social system known as the caste system, which is generally associated with the Hindu religion in India and is still used today

Before the rise of the Khmer Empire, the Khmer people lived in several small **kingdoms** in the Angkor region of what is now Cambodia. In 802 CE, a prince by the name of Jayavarman II declared himself *Chakravartin* (king of kings) and formed the Khmer Empire.

Life in the Khmer Empire followed a strict social hierarchy. Roughly speaking, Khmer society was divided into five classes known as **castes**:

- the king
- nobles
- military officials and priests
- common people (including peasants, architects and artists)
- slaves.

The king, at the top of the hierarchy, was the source of all legal and religious power and was head of the military. He was also the main force behind the creation of public buildings (such as temples), roads and canals. The nobles and military officials were required to swear an oath of loyalty to the king and in return they were trusted to administer the king's laws and carry out tasks such as tax collection.

Mongol expansion

khans
the title given to leaders of Mongolian communities

Before the formation of the Mongol Empire, many separate tribes of Mongol people, under the leadership of **khans**, competed for land and resources on the flat grassy plains of central Asia known as the Eurasian Steppe. The Mongol Empire was formed in 1206 CE by a great ruler who united the many different Mongol tribes. He was known as Temujin, and later took the title Genghis Khan, meaning 'ruler of the world'. Within 100 years, Mongol territory would grow to become the largest continuous land-based empire in human history.

Source 5 In Khmer society, the king was worshipped as a god and held the highest social caste. This stone carving at Angkor Thom shows a king at his royal court.

Source 6 A re-enactment of a Mongol army charge; the army formed an important part of the social structure of the Mongol Empire. It was also vital for the empire's expansion.

Under Genghis Khan's rule, the empire expanded rapidly. To thrive, it needed organisation and stability – the traditional social structures of the Mongol tribes had to be changed to suit the new empire. Mongol tribesmen were natural warriors, so Genghis Khan built on this strength. He created an organised army that became the foundation of society. All men under 60 could be called up for military service.

The army was divided into separate divisions with different functions. Each division had its own commander, who was responsible for training and disciplining men. The ultimate command of the army rested with Genghis Khan. An elite military group known as the imperial guard was also formed. It provided Genghis Khan with the people he needed to organise and administer his empire. The imperial guard also became the training ground for the empire's new ruling class. In 1206, members of the guard numbered somewhere around 10 000. Recruits came from all tribes, and membership was considered a supreme honour.

Whenever a new territory was conquered, Genghis Khan introduced immediate changes. If the rulers of these territories submitted to Mongol rule they were treated as allies and left in a position of power. If they refused, their cities were destroyed and their populations were killed.

Once a territory was part of the empire, Genghis Khan would order a **census** to be conducted; this helped give an idea of the size of the territory's population and their possessions. Next, taxes were imposed on the population. Finally, a legal system known as the *yasa* was introduced. At its peak, the *yasa* governed over 100 million people.

census
a 'head count' or audit of the number of people living in a particular place at a particular time; information collected during a census often includes age, occupation, income, etc.

Japan under the shoguns

clans
groups of people linked and united in their aims and behaviours by the knowledge (or a belief) that they share common ancestors

shogun
a chief military commander of Japan between the twelfth and nineteenth centuries CE; shoguns dictated how the country would be ruled

daimyo
a feudal lord of Japan who was a large landowner, and offered his loyalty and service to the shogun

samurai
a Japanese medieval warrior; the word 'samurai' means 'one who serves'

The social structure of ancient Japan was based on **clans** – groups of families related by blood or marriage. The most direct connection people had to the ancestor *kami* (or spirit world) was through their clan leader. In early Japan, clans often fought battles over land in order to increase the power of one clan over another.

Later, as Japan moved into the medieval period, these clan structures became more formal and led to the formation of a strict social hierarchy. Social rank was determined at birth and was clearly defined. The members of each class knew what was expected of them, and had rights and responsibilities they had to fulfil.

Broadly speaking, there were seven social classes:

- the emperor
- the **shogun**
- ***daimyo***
- **samurai**
- peasants
- craftspeople and merchants
- outcasts.

Source 7 During the medieval period in Japan, warrior classes evolved that were controlled by a military leader (shogun) rather than the emperor. Samurai (such as the one shown here) were an important part of the warrior classes. They lived by a strict moral code that still influences elements of Japanese society to this day.

Over time, power became concentrated in the hands of the warrior classes: the shogun, *daimyo* and samurai. The shogun held all the power, while the emperor was only a figurehead. In many ways, this system was similar to **feudalism** in medieval Europe.

Unlike other Asian societies, which changed over time because of trade and contact with people from Europe, Japan was closed to the outside world for over 200 years (from *c.* 1630–1860). Because of this isolation, traditional codes of behaviour established during this period in Japan are still important today.

The Polynesian expansion across the Pacific

In Polynesian societies, the importance of each person within the social hierarchy was often based on their relationship with their ancestors. People who could trace their ancestors back the furthest frequently had the greatest power and social standing. For example, on the islands of Aotearoa (New Zealand), Māori tribes had three main social classes:

- *rangatira* (rulers)
- *tutua* (the largest and most productive group)
- *taurekareka* (slaves who had been captured in war).

In addition, and at differing levels of the social structure, there was a fourth class called *tohunga* (specialists, educators and priests).

The *rangatira* were made up of the most important families. The *ariki* (chief) was usually the first-born son of the most senior family – one that could trace its ancestry back to the 'Great Fleet' of eight founding canoes that were said to have arrived in 1350. The *ariki* was expected to listen to opinions of all members of the tribe and to prove their leadership in war, diplomacy and the wise treatment of the people.

At the bottom of the hierarchy, the *taurekareka* carried out all the manual tasks for the tribe, but were not prisoners. Tribal beliefs stated that once they were captured, slaves were considered dead, so it made little sense for them to escape. These slaves could often marry into the tribe and their children would be free.

A set of laws known as *tapu* were central to Māori life. They were developed to protect sacred places, people and objects.

Source 8 Māori *rangatira* Tāmati Wāka Nene (*c.* 1785–1871)

feudalism
a set of legal and military customs that served to organise the society of medieval Europe and Japan

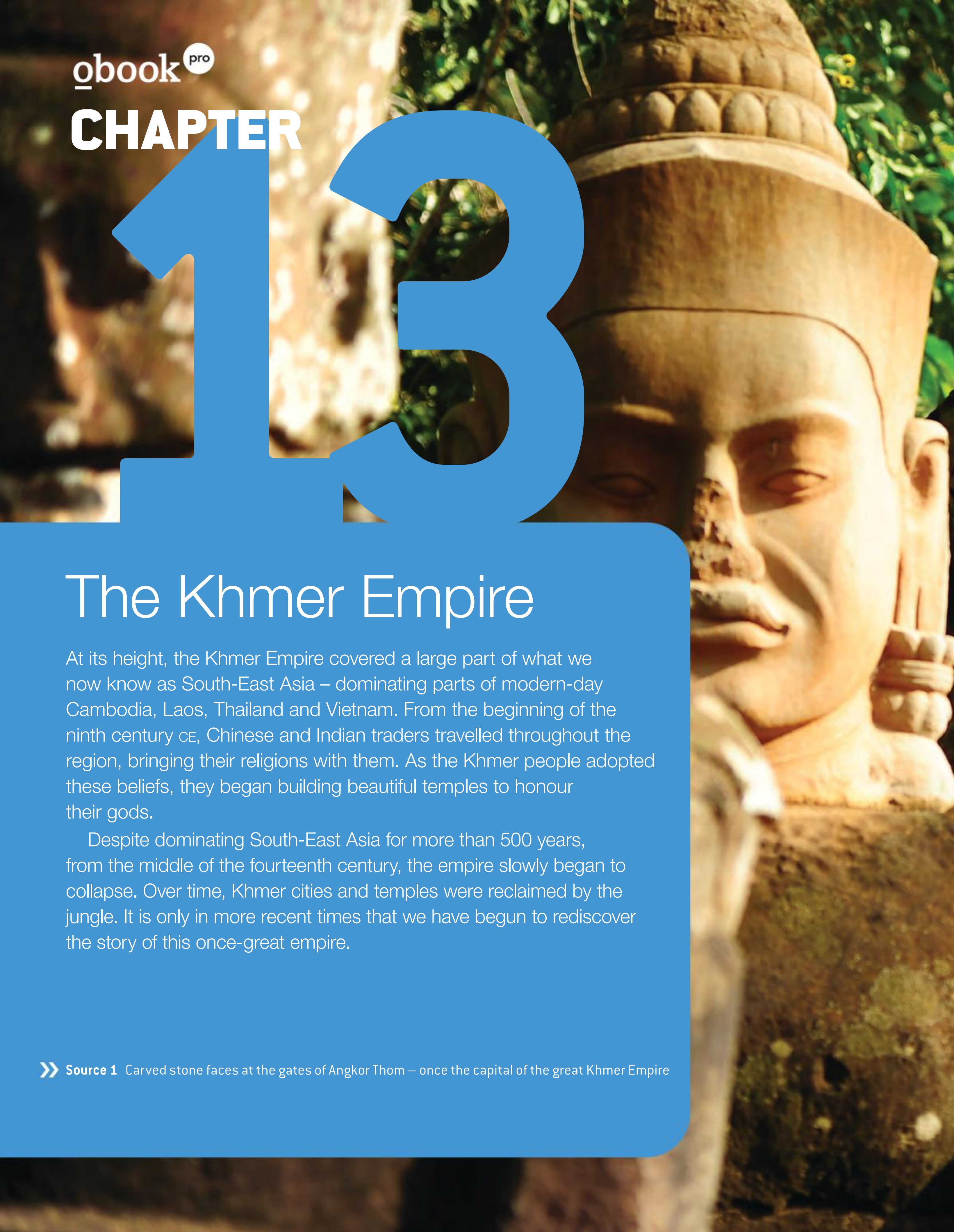
12.2 CHECK YOUR LEARNING

Review and understand

1. The belief systems of most societies in the Asia–Pacific world had one thing in common. **Identify** and describe this common element.
2. Over its history, the Khmer Empire was influenced by three separate religions and/or belief systems. **Identify** them and describe how they changed society.

Apply and analyse

3. List the names of the social classes of the Khmer Empire. **Suggest** any other country today that has these classes.
4. **Explain** how natural spirits influenced the development of religion in Japan.
5. **Compare** the social classes of Japan and Polynesia. How were they similar, and how were they different?



CHAPTER 13

The Khmer Empire

At its height, the Khmer Empire covered a large part of what we now know as South-East Asia – dominating parts of modern-day Cambodia, Laos, Thailand and Vietnam. From the beginning of the ninth century CE, Chinese and Indian traders travelled throughout the region, bringing their religions with them. As the Khmer people adopted these beliefs, they began building beautiful temples to honour their gods.

Despite dominating South-East Asia for more than 500 years, from the middle of the fourteenth century, the empire slowly began to collapse. Over time, Khmer cities and temples were reclaimed by the jungle. It is only in more recent times that we have begun to rediscover the story of this once-great empire.

Source 1 Carved stone faces at the gates of Angkor Thom – once the capital of the great Khmer Empire

13A
How did the Khmer Empire rise to power?

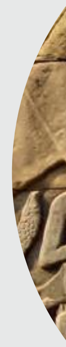
13B
How was society organised during the Khmer Empire?

13C
Why did the Khmer Empire come to an end?

13.1 The Khmer Empire: a timeline

Sequence this!
Key events and developments in the Khmer Empire

Preah Ko temple in Hariharalaya



Source 1 A timeline of some key events and developments in the Khmer Empire

c. 100 BCE – 500 CE
Legends tell of the first Khmer kingdom, known as Funan, being founded in the Mekong River delta. Many Indian and Chinese customs and beliefs spread throughout the region as a result of contact through trade.

c. 500–700 CE
The power and authority of Fanan declines and it is absorbed by a neighbouring kingdom to the north known as Chenla.

c. 700–800
The power and authority of Chenla breaks down. Smaller kingdoms compete for power and control.

802
Jayavarman II forces a number of small Khmer kingdoms to unite, founding the Khmer Empire and building a capital. He then declares himself *Chakravartin* ('ruler of the world'). Hinduism becomes the official religion of the empire.

877
Jayavarman II's nephew, Indravarman I, becomes king and establishes his royal court at Hariharalaya. One of the first temples built during the Khmer Empire – Preah Ko – is built there. The East Baray (a reservoir designed to store water) is also built.

889
Yasovarman I becomes king and establishes the first official capital of the Khmer Empire, Yasodarapura.

100 BCE | 500 CE | 700 | 800 | 900

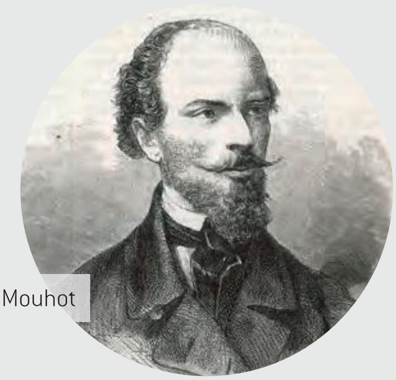
96
Ja
Th
is
Hi

Source 2 Reference guide

Key term	Definition
Angkor	The first capital city of the Khmer Empire; this city was actually referred to as Yasodharapura by the Khmer people. Angkor – meaning 'city' – developed from a word in the ancient Indian language of Sanskrit. Many historians use the term 'Angkor' to refer to the first capital city, the Angkor region, or even the Khmer Empire itself. In this book, however, it is only used to describe the city.
Angkor region	A region within modern-day Cambodia that covers around 400 square kilometres and features over 1000 temples (including Angkor Wat and the Bayon Temple)
Angkor Thom	The last capital city of the Khmer Empire; Angkor Thom – meaning 'great city' – was a fortified city that contained the homes of priests, officials of the palace and members of the military, as well as buildings for administering the empire.
Angkor Wat	A temple complex located in the Angkor region built by Suryavarman II in the twelfth century; Angkor Wat – meaning 'city temple' – is the largest Hindu temple complex and the largest religious monument in the world. It covers an area of around 2 square kilometres.

Detail from the Bayon Temple wall at Angkor Thom showing fighters from Champa and the Khmer Empire in battle

A sculpture of Jayavarman VII



Henri Mouhot

68
yavarman V becomes king. e temple of Banteay Srei constructed to honour the ndu god Shiva.

1002
Civil war breaks out in Angkor as rival leaders compete for control of the Khmer Empire.

1006
Suryavarman I becomes king and expands the empire through several military conquests.

1113
Suryavarman II becomes king. Under his rule, Angkor Wat ('city temple') is built. It serves as a state temple and the capital city of the empire for a time.

1177
The kingdom of Champa (a civilisation to the east, now Vietnam) defeats the Khmer, plundering and burning parts of the Angkor region.

1181
Jayavarman VII becomes king. The Cham are defeated and driven out of Angkor. Under Jayavarman VII's rule, many temples and hospitals are built and the road system develops rapidly. Buddhism becomes the official religion of the empire.

***c.* 1200**
A new capital city called Angkor Thom ('great city') is built by Jayavarman VII.

1296
A Chinese traveller and writer by the name of Zhou Daguan visits the Angkor region and records features of daily life there.

1432
The Angkor region is attacked by the kingdom of Ayutthaya (a civilisation to the west, now Thailand) and thousands are enslaved, causing Angkor Thom to be abandoned.

1860
French explorer and archaeologist Henri Mouhot visits ruins in the Angkor region and records his observations – leading many in the West to believe he has rediscovered a lost civilisation.

1000 | 1100 | 1200 | 1400 | 1900 CE

13.1 CHECK YOUR LEARNING

Review and understand

1. **Identify** the year Jayavarman II became king and founded the Khmer Empire.
2. **Describe** how Chinese and Indian customs and beliefs spread throughout the Angkor region.
3. **Define** the term 'baray'. What is a baray used for?

Apply and analyse

4. Using Source 1, **calculate** how many years there were between the founding of the Khmer Empire and its abandonment after the invasion by the Ayutthaya.
5. **Summarise** the meaning of the Khmer term 'Angkor Thom'. Why is Angkor Thom called this?
6. Consider why the word 'Angkor' has developed to have so many different meanings. **Suggest** how this might have come about.

Evaluate and create

7. Conduct some **research** to find out more about one of the rulers mentioned in this timeline. Present your information in a suitable and creative manner.

13.2 The importance of geography for the Khmer Empire

In this topic, you will:

» understand how the physical environment influenced the development of the Khmer Empire.

Every society has features that are unique – that make one society stand apart from another. In the case of the Khmer Empire, these features were largely based on a range of geographical and environmental factors. Together with the hard work and initiative of the Khmer people, these features helped the Khmer Empire to become one of the wealthiest and most powerful empires in history. The Khmer dominated in areas of architecture, warfare, agriculture and art across South-East Asia for over 500 years.

The Khmer Empire grew out of a number of different societies living across a region of South-East Asia that is now part of modern-day Cambodia and Vietnam (see Source 3). This region has a tropical climate, meaning that it is very warm and humid all year round. Unlike Australia's climate, which has four seasons, Cambodia has a wet season and a dry season. The wet season (from May until October) brings heavy rains and **monsoons**, while the dry season (from November until April) brings little to no rain at all.

monsoons
wind systems that bring seasonal heavy rainfall that affects the climate of a large area of Asia

SOUTH-EAST ASIA

Source 3 This map shows the location of modern-day Cambodia

Source: Oxford University Press

During the time of the Khmer Empire, the people took full advantage of these weather patterns, as well as the natural geographical features in the area. In particular, the Khmer harnessed the Mekong River and Tonle Sap Lake in modern-day Cambodia to feed their people and grow their empire.

CAMBODIA

Source: Oxford University Press

Source 4 A map of modern-day Cambodia showing the Mekong River and Tonle Sap Lake

The Mekong River

The Mekong River not only provided water for drinking, it also helped the Khmer to irrigate rice crops and transport them. The fertile lands in the Mekong River **Delta** were ideal for growing crops, and inland areas to the north of the coast became used for large-scale rice production. The river also allowed the Khmer to travel and trade with societies both to the north and south of the Angkor region, and connected the empire to the outside world. The Mekong was a good natural defence for the Khmer because of its many **sand bars** and changing currents. Only the Khmer had the necessary local knowledge to navigate it.

delta
an area of flat, low land, where a river approaches the sea and empties into it

sand bars
long, narrow banks of sand, especially at the mouth of a river

Source 5 The Mekong River Delta creates a maze of sand bars, providing a strong defence from invading kingdoms.

Source 6 The flat flooded lands of the Mekong River Delta are ideal for rice farming.

Explore it!
A virtual field trip to Tonle Sap Lake

reservoir
a large body of water (such as a natural or artificial lake) that is used as a supply of fresh water

Tonle Sap Lake

Tonle Sap Lake was another important geographical feature for the Khmer people. During the Khmer Empire it acted as a giant **reservoir** for the Mekong River, and provided the growing population with a steady supply of fish.

During the dry season, Tonle Sap is a relatively small lake covering an area of around 2700 square kilometres, with an average depth of about 1 metre. During the wet season, however, melting snow from high in the Himalayas flows into the Mekong River, together with water from heavy monsoonal rainfalls. This water causes the Mekong River to flood and flow into Tonle Sap Lake. At this time of year, the lake expands to an area of around 10 000 square kilometres and its average depth increases to around 9 metres. The flooded areas surrounding Tonle Sap create the perfect growing conditions for rice and breeding environment for fish.

The lake was so important to the Khmer people's way of life that they even built floating houses and villages so they could live close to it. During the dry season, these houses rested on land; during the wet season, they floated.

Access to food and water was vital to the Khmer people, so they developed a complex network of canals and reservoirs to ensure they had a water supply all year round.

To this day, Tonle Sap is still the largest freshwater lake in South-East Asia and is of major importance to the people of Cambodia.

Source 7 Many floating houses and villages surrounding Tonle Sap Lake today are very similar to those that would have existed during the Khmer Empire.

13.2 CHECK YOUR LEARNING

Review and understand

1 **Identify** the lake that was so vital to the Khmer Empire. Outline two reasons why it was important.

2 **Outline** how the climate of South-East Asia influenced the development of Khmer society.

Apply and analyse

3 **Distinguish between** Cambodia's climate and Australia's climate. How are they different?

4 **Summarise** the environmental factors that cause Tonle Sap Lake to increase in size each year. How did these changes affect the way the Khmer people lived?

Evaluate and create

5 Examine Source 3. Assess the location of Cambodia within South-East Asia. **Propose** the advantages of its location for sustaining an empire, and also the disadvantages. (Some points may relate to both.)

13.3 Origins of the Khmer Empire

In this topic, you will:

» investigate the structure and political influence of kingdoms within the Khmer region.

kingdoms
regions ruled by a king or queen

Indianisation
the spread of culture, traditions and spiritual beliefs beyond their traditional home in India to other countries around the world

caste
a social group into which a person is born; castes are part of a social system known as the caste system, which is generally associated with the Hindu religion in India and is still used today

Before the Khmer Empire rose to power in around 802 CE, there were several groups of small Khmer **kingdoms** with settlements across the Angkor region. Most were located across the fertile Mekong River Delta and around Tonle Sap Lake. In addition to Khmer people, the region was also home to Malay people known as the Cham, who formed a kingdom to the east of Angkor called Champa.

From around 100 to 700 CE, two major Khmer kingdoms gained control over different parts of the Angkor region.

The kingdom of Funan

Records kept by ancient Chinese historians often refer to the first kingdom of Khmer people that settled in the Mekong River Delta as Funan. The name 'Funan' comes from the Khmer word *phnom*, meaning 'hill'. Unfortunately, no records exist to show what the Khmer people living there called themselves or their kingdom.

Source 8 shows the location of Funan based on Chinese records. It occupies an area that is now part of Vietnam and Cambodia.

There is evidence to suggest that the influence of Indian culture had a great impact on the Khmer people in Funan. At this time, India was a highly developed society and its merchants travelled great distances to trade. These merchants brought not only goods to trade with the Khmer, but also their culture, philosophies and religions. Over time, these beliefs and customs were adopted and mixed with the traditional beliefs and customs of the Khmer people. Historians refer to this process as **Indianisation**. Over time, the Khmer adopted Hinduism as their religion and introduced a modified version of the Indian **caste** system.

Funan's success and authority were mainly the result of two things:

- successful farming practices (based on water storage and management techniques) that produced large quantities of rice
- the location of its main trading settlement, Oc Eo, on the Mekong River, close to a key stop on the trade route between China and India.

PART OF SOUTH-EAST ASIA, SHOWING THE LOCATIONS OF CHAMPA, FUNAN AND CHENLA

Source: Oxford University Press

Source 8 This map also shows the location of the main Funan trading settlement, Oc Eo.

Source 9 A view of Angkor Wat, showing the type of geographical location in which the Khmer Empire formed

However, in the fourth century CE, Oc Eo's importance began to decline, as the Chinese developed other sea routes and established trading settlements in places such as Java (a part of modern-day Indonesia). Chinese ships no longer stopped at Oc Eo, so trade declined and the power of the kingdom decreased. Around the same time, a neighbouring kingdom to the north began to grow in importance and prosperity, and absorbed Funan in the sixth century CE. This kingdom is also only known to us by its Chinese name – Chenla.

The kingdom of Chenla

The kingdom of Chenla was based in the Angkor region close to Tonle Sap Lake. Although very few records from the time exist, historians today believe that Chenla was made up of at least two smaller kingdoms – one in the south, known as 'Water Chenla', and one in the north, known as 'Land Chenla'. Water Chenla occupied the coastal areas that had once been part of Funan. It continued to trade with the outside world. Land Chenla was more inward-looking, and based its economy on agriculture and the production of rice.

In the eighth century CE, historians believe the kingdom of Chenla broke down into a number of competing kingdoms, each fighting for control. It was not until around 790 CE that a local ruler by the name of Jayavarman II took control and forced these rival kingdoms to unite. In 802 CE, he had himself declared *chakravartin* ('ruler of the world'), and the Khmer Empire was born.

13.3 CHECK YOUR LEARNING

Review and understand

1. **Identify** the name ancient Chinese historians gave to the first Khmer kingdom.
2. **Describe** why the power and authority of the first Khmer kingdom declined.
3. **Define** *chakravartin*.

Apply and analyse

4. **Explain** the process of Indianisation and its effect on the Khmer people.
5. Look at Source 8 and locate Chenla, Java and Oc Eo. **Summarise** how changes in the routes taken by Chinese traders would have affected the people of Oc Eo and Funan.

Evaluate and create

6. Using Google Earth, locate Thoai Son District in An Giang Province in Vietnam, and then find Oc Eo. **Research** the features that you can see in the area and suggest how these features might have affected early Khmer settlements.
7. **Create** a poster or presentation outlining the key environmental features that allowed people to settle and thrive in the Angkor region.

13.4 Significant individual: Jayavarman II

In this topic, you will:

- » examine the rise and political developments of Jayavarman II
- » consider how the leadership of Jayavarman II shaped Khmer society.

Sanskrit
an ancient language of India and the language used in documenting the holy books of Hinduism

Before Jayavarman II came to power in 802 CE, all the Khmer kingdoms in the lower Mekong River region had been in a state of conflict – both with each other and with nearby groups such as the Javanese and the Cham. The region was not unified under one ruler. Jayavarman was responsible for forcing all the Khmer kingdoms to unite and form the Khmer Empire. For this reason, he is regarded as the founder of the Khmer Empire and one of its most significant kings. In fact, the name Jayavarman comes from **Sanskrit** (the sacred language of Hinduism) – *jaya* means 'victorious' and *varman* means 'protector'.

Because no written documents exist from the time of Jayavarman, a lot of what we know is based on legends and records from later Khmer kings. For example, many stone inscriptions that mention him are from later periods. The best known of these is at the temple of Sdok Kok Thom.

Early life

Evidence from the inscriptions at Sdok Kok Thom Temple (see Source 10) tells us that before Jayavarman became king, he had spent some years on the island of Java, possibly as a hostage or prisoner. There is some debate about when he returned to Cambodia from Java, but most agree it was around 790 CE. Upon his return, he quickly conquered some territory halfway up the Mekong River, setting up his first capital at a place called Indrapura. He then moved his base three more times. The reasons for the changes are uncertain, but may have been for better sources of food.

Source 10 Stone inscriptions found at the Sdok Kok Thom Temple (on the modern-day border between Cambodia and Thailand) tell us much of what we know about the rise of Jayavarman II to power in the ninth century CE.

The rise of Jayavarman II

After establishing the Khmer Empire, Jayavarman had himself declared *chakravartin* at a special religious ceremony. This effectively made him the king of all regional Khmer kings. At the same ceremony, Jayavarman declared that one Khmer god would become the king of all other gods. He also declared himself *devaraja* (meaning 'god-king'). Historians think that the Khmer kings who were *devaraja* were either worshipped as living gods or were seen as the intermediary (go-between) between the people and the gods, particularly the Hindu god Shiva.

With these declarations, Jayavarman created a system that ensured both political stability and religious stability, as it enabled him and future Khmer kings to rule over the empire with political and religious authority. All minor

Source 11 An artist's impression of Jayavarman II, created in 2017

Khmer kings, who controlled small parts of the empire, now served Jayavarman, the 'king of kings'. All minor Khmer gods who protected each of these kings now served the *devaraja*. Many historians refer to this system as the '*devaraja* cult'.

At the same ceremony, all previous pledges or oaths of loyalty between smaller Khmer kingdoms and their kings were overturned. Evidence of this ceremony is carved on the temple at Sdok Kok Thom. Jayavarman left no inscriptions himself.

Around this time, Jayavarman moved his capital once more – to Mount Mahendrapura near Tonle Sap Lake (now known as Phnom Kulen). Here, he built a large temple and carved images of Hindu gods into the river beds to bless the water flowing into Angkor.

KEY CONCEPT
Evidence

Primary sources on the Khmer Empire

One of the things that makes the history of the Khmer Empire so difficult for historians to understand and document is a lack of primary source material.

In many cases, primary sources from the time of the Khmer Empire – such as written records, buildings, tools and household objects (for example, pots and bowls) – have been completely lost. What remains are the stone temples and carvings that tell of the kings, events and beliefs of the Khmer Empire. The difficulty with these sources of evidence is that they provide an incomplete picture of the empire – one that many historians argue about.

There is only one written primary source from the Khmer Empire available to historians. This is provided by a Chinese ambassador and traveller called Zhou Daguan, who visited the Angkor region in 1296 and lived in Angkor for about a year. His journals provide another valuable source of evidence for historians, but it is one that cannot be fully verified as no other written sources have been found.

Despite these challenges, historians continue their study of the Khmer Empire. As new technologies develop and more evidence is uncovered, historians continue to generate new and interesting hypotheses as they strive for a greater understanding of the Khmer Empire.

For more information on this key concept, refer to page 201 of 'The history toolkit'.

See, think, wonder

Look at Source 11.

- What do you see?
- What do you think?
- What do you wonder?

Jayavarman II's achievements

Quiz me!
A quick quiz on Jayavarman II

In addition to founding the Khmer Empire, Jayavarman established a system of officials and courtiers (people who serve the king in administrative roles), who were rewarded with land and political positions for their work. This system helped maintain the political and religious stability of the Khmer Empire – it was tied closely to the temples and was designed to control peasant workers in the rice fields by establishing a strict social **hierarchy**.

Jayavarman is believed to have died in 850, at which point his son (Jayavarman III) became the next king, followed by his nephew (Indravarman I). How new kings were selected is unknown, but it was not necessarily by birth. More likely, it was the man's ability as a soldier that made him suitable as a leader.

hierarchy
a social structure that organises people with the most important group on top and others ranked beneath in decreasing order of importance

Source 12 An elephant statue at Mount Mahendrapura (now Phnom Kulen)

Source 13 These stone carvings at Mount Mahendrapura were once part of a temple built by Jayavarman II.

13.4 CHECK YOUR LEARNING

Review and understand

1 **Define** what the name Jayavarman means in Sanskrit. Why might he have been called this?

Apply and analyse

2 **Explain** why it is so difficult for historians to create a complete picture of how Jayavarman II came to power.

3 **Summarise** the motives of Jayavarman II in establishing a set of officials and courtiers.

4 In your own words, **explain** the *devaraja* cult and its importance to the formation and stability of the Khmer Empire. Include a few sentences to compare the power of Khmer kings who were revered as *devaraja* and the power of modern political leaders today.

Evaluate and create

5 'In some ways Jayavarman II was a dictator, yet his authority was also necessary for the Khmer people.' **To what extent** do you agree with this? Write a short paragraph explaining your position. You may need to conduct some further research.

6 Jayavarman VII was a king who ruled the Khmer Empire from 1181 to *c*. 1218 CE (see page 13.15). **Research** his life and write a biography, presented in the same way that this chapter on Jayavarman II has been (with subheadings on his early life, rise and achievements). Include:
- Jayavarman VII's influence in expanding the empire
- expelling the Chams
- successes of territorial expansion
- the construction program in Angkor during his reign.

13.5 Expansion of the empire

In this topic, you will:

- explore how trade strengthened the economy and aided the expansion of the Khmer Empire
- investigate the effect of conquests led by Khmer kings on the expansion of the Khmer Empire.

Quiz me!
A quick quiz on the expansion of the empire

Khmer kings were determined to strengthen and expand the empire. While they enjoyed the relationships formed with other societies through trade, they were not afraid to instigate war in order to expand or defend their territory, and they built a well-equipped army and naval force.

Expansion of the empire through trade

A key achievement of the Khmer Empire was its ability to build strong trade links with societies across South-East Asia. Trade in rice and fish became a key part of the Khmer Empire's economy. Use of the Mekong River allowed the Khmer to trade in regions both north and south of the empire. As the empire grew and developed, its trading partners grew in number as well. By 1100, trade routes to the south Indian ports and Chinese ports were established, and inland routes across South-East Asia were also well developed. More resources were exported to these new destinations including elephants, ivory, feathers, spices and woods. The Khmer also imported goods from China, including gold, silver, ceramics, glassware and silk.

The economy of the Khmer Empire became stronger and better than that of its rivals in other parts of the region. To a large extent, it was trade that supported this economy and helped the Khmer build the wealth that enabled them to design and build the elaborate temple complexes that remain today.

Source 14 A detail from a stone carving on the wall of the Bayon Temple at Angkor Thom showing fish being traded at a busy market

Source 15 A stone carving showing the Khmer army with an elephant

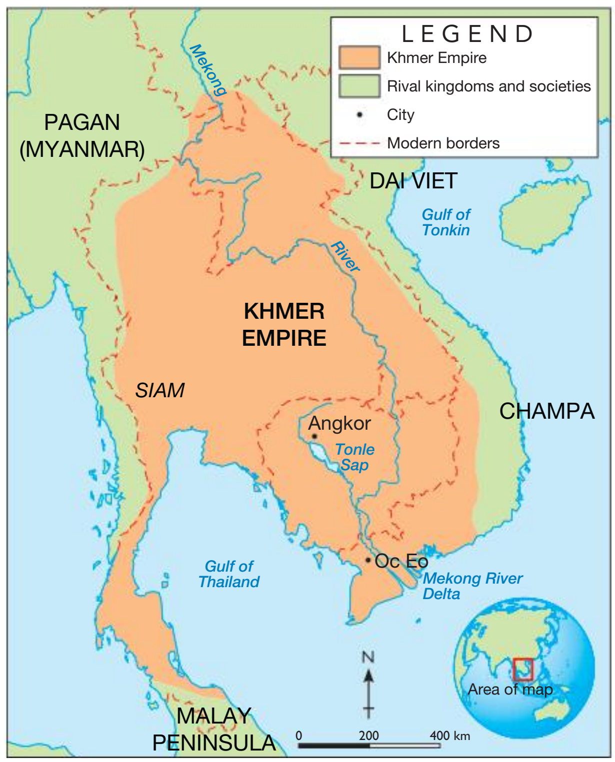
Expansion of the empire through warfare

Despite the willingness of Khmer kings to trade peacefully with societies across the region, at its heart the Khmer Empire was a warlike society. Hundreds of stone carvings on temples across the Angkor region depict great battles and feats of bravery. Throughout the empire's rule, the Khmer often clashed with the kingdom of Champa, their closest neighbour to the east (now part of Vietnam). Towards the end of the empire's rule, the Khmer were also in regular disputes with the kingdom of Ayutthaya, to the west (now part of modern-day Thailand and Laos).

Based on the evidence available, Khmer soldiers appear to have been very successful in battle. The way in which the army was organised and the military strategies they followed were loosely based on models brought from India.

In the early days of the empire, the army was organised into four divisions: the infantry (foot soldiers), the cavalry (soldiers on horseback), the charioteers (soldiers on horse-drawn chariots) and soldiers on elephants. Later, however, it appears that horses were no longer used by the army. As they were not local to South-East Asia, horses had to be imported at great expense. Horse-drawn chariots were also impractical, as they could not travel easily across waterlogged rice fields without becoming bogged down.

THE KHMER EMPIRE AT ITS GREATEST EXTENT, *C.* 1200 CE



Source 16 Source: Oxford University Press

KEY CONCEPT
Continuity & change

Martial arts in Cambodia

Another achievement of Khmer warfare was the development of a martial art, known as *bokator*, which roughly translates as 'pounding the lion'. Like many societies across Asia, the Khmer developed *bokator* in order to train soldiers for combat. *Bokator* drew its inspiration from nature by copying or imitating the movements of trees and animals. *Bokator* fighters used elbow and knee strikes, shin kicks, and weapons such as bamboo staffs and short sticks. References to *bokator* during the Khmer Empire can be seen carved into the walls of the Bayon Temple at Angkor Thom (see Source 17).

This form of martial arts was closely linked to religious thought, and its rules were guided by this. The Khmer believed that the right hand represented the Hindu god Brahma and the left hand represented Buddha. Because Buddhism taught peaceful ways, it was the right hand that should be used to strike after blocking with the left hand at least three times.

The traditions of *bokator* in Cambodia were almost wiped out during the 1970s. At this time, Cambodia was ruled by a political party called the Khmer Rouge. The Khmer Rouge carried out the mass murders of many different groups within society, including those who practised traditional arts. Experts in *bokator* were killed, along with thousands of others.

Despite the efforts of the Khmer Rouge, this brutal period in Cambodia's history did not put an end to *bokator*. It has survived to this day. In fact, it is now Cambodia's national sport (see Source 18).

For more information on this key concept, refer to page 200 of 'The history toolkit'.

Source 17 A stone carving of a *bokator* fighter at the Bayon Temple, Angkor Thom

Source 18 Modern-day *bokator* fighters in Cambodia, demonstrating a fighting technique

Khmer soldiers used a range of weapons in battle, such as spears, swords, shields, and bows and arrows. Some stone carvings also show Khmer forces using a type of **catapult** designed to fire arrows at the enemy. These catapults were often mounted on the backs of horses or elephants.

catapult
a weapon that worked like a giant slingshot

The Khmer were also famous as a strong naval force. Khmer soldiers often went into battle on large open boats, around 20 metres in length. These boats were powered by many oarsmen and featured detailed carvings, presumably to scare their enemies. Stone carvings show Khmer soldiers defeating their enemies and throwing them off the boats to be eaten by the crocodiles.

plundering
stealing, often using violent force

The most common reason why the Khmer went to war was to expand their empire. The kings who followed Jayavarman II continued to extend the territory of the empire, mostly by attacking and **plundering** rival kingdoms outside their borders:

- Suryavarman I (1002–50 CE) made several military conquests. He extended the empire west into Ayutthaya.
- Suryavarman II (1113–50) made further conquests west in the Mon kingdoms in modern-day Myanmar (Burma), and further south in the Malay Peninsula. He also invaded parts of Champa and modern-day Laos.
- Jayavarman VII (1181–1218) fought and defeated the Cham in 1203, taking much of their territory and adding it to the Khmer Empire. Before he came to power, the Cham had attacked Angkor and raided Khmer cities. Under Jayavarman VII's military leadership the Khmer Empire reached its greatest extent (see Source 16).

Source 19 This scene from a naval battle shows Cham boats being boarded by the Khmer. Below, drowned victims are shown entangled in the oars.

13.5 CHECK YOUR LEARNING

Review and understand

1. **List** two resources that the Khmer Empire exported.
2. **Identify** two kingdoms that the Khmer Empire regularly went to war with. In which modern-day countries are these historical kingdoms located?

Apply and analyse

3. In your own words, briefly **summarise** the ways that trade strengthened the Khmer Empire. How did trade contribute to the legacy of the Khmer Empire?
4. **Explain** how the Khmer army was organised during the early days of the empire. How did this organisation change over time and why?
5. **Examine** Source 15.
   a. How many divisions of the Khmer army can you identify?
   b. Make a few notes about the dress style of the fighters shown. What reason might there be to explain what they are wearing?
   c. What types of weapons can you identify?
   d. Create your own 'stone carving' in the style of Source 15. In your 'stone carving', represent either the Khmer naval forces or the use of catapults by the Khmer army, as described in the text.

13.6 Achievements in temple building

In this topic, you will:

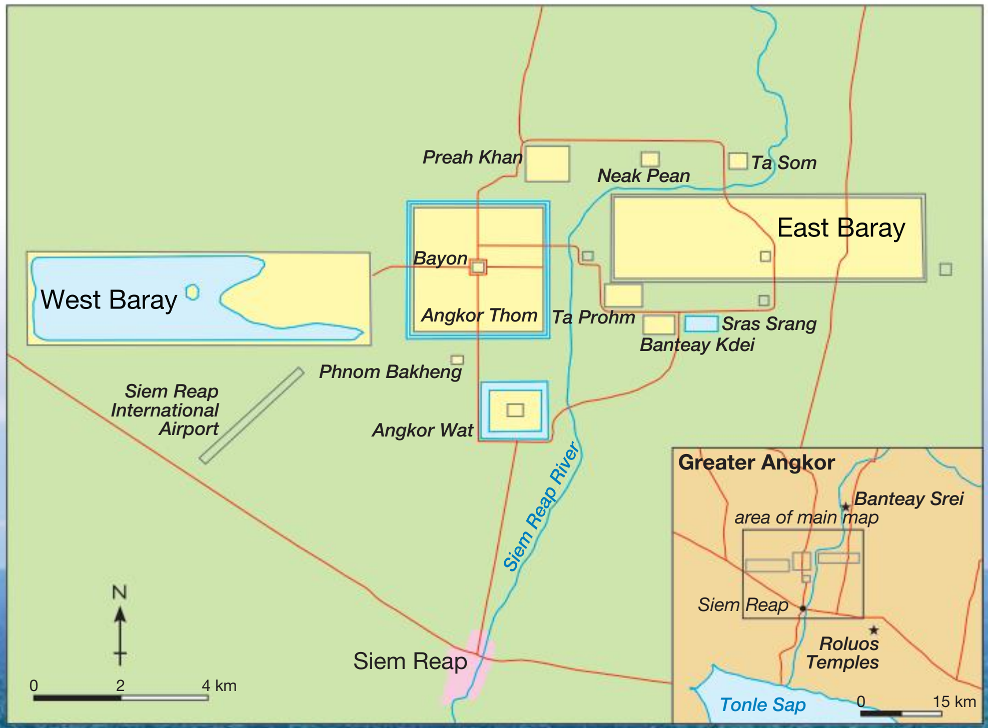
» study the design and purpose of temple building in the Angkor region.

Temples are the last remaining sources of evidence of the great Khmer Empire, and many historians believe they represent the empire's greatest achievement. During the rule of the Khmer Empire, only temples and other religious buildings were constructed of stone. All other non-religious buildings, such as houses, were made out of perishable materials like wood and palm leaves, so none of these have survived.

There are hundreds of temples in the area north and east of modern-day Siem Reap, particularly around Tonle Sap Lake. Historians believe that the remains of temples that have been found dotted across the Angkor region represent only a fraction of the total number that once covered the empire (see Source 20).

Watch it!
A video and quiz on Angkor Wat

MAIN TEMPLES IN THE ANGKOR REGION



Source 20 Source: Oxford University Press

Source 21 Angkor Wat Temple, Siem Reap, Cambodia

Purpose and layout of temples

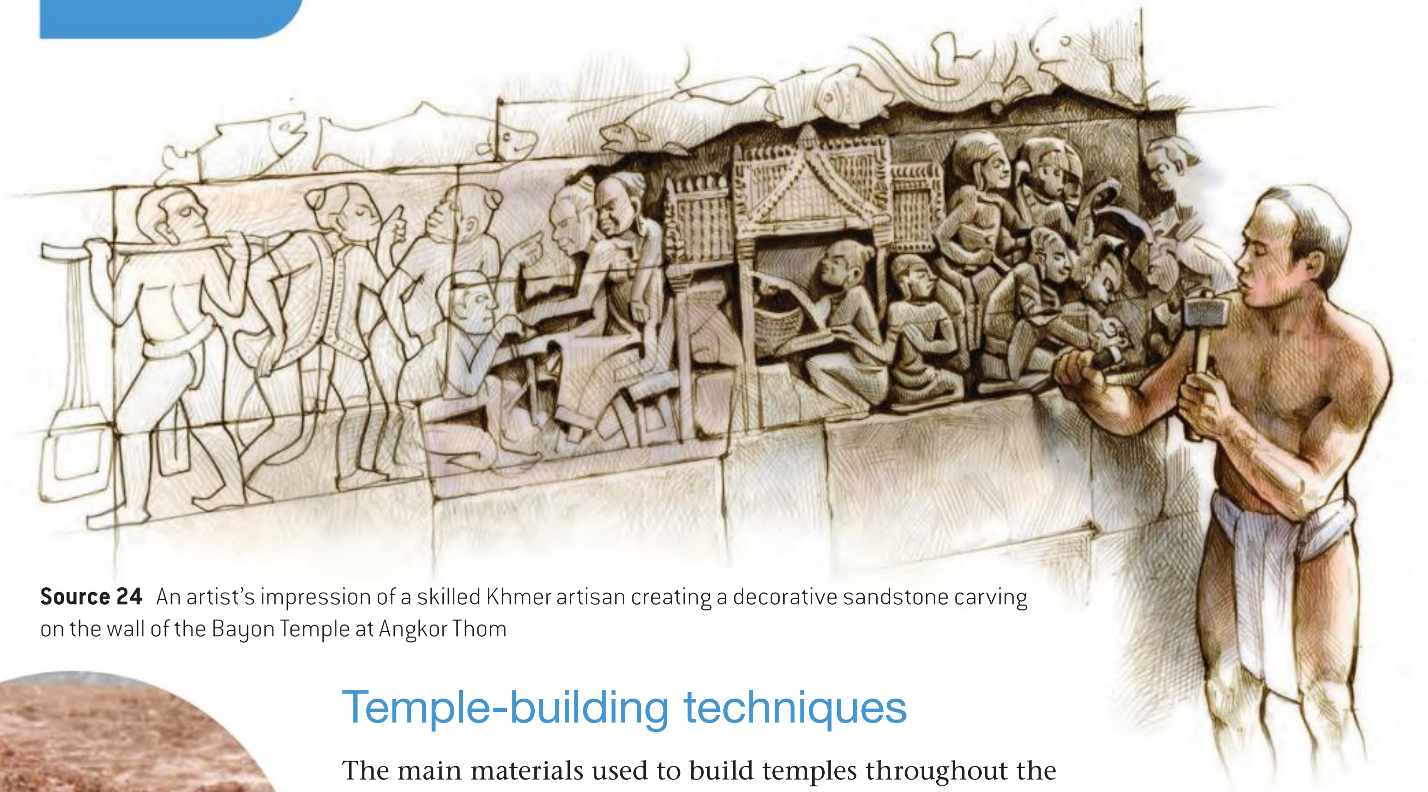
Temples constructed during the Khmer Empire were dedicated to Hindu gods – most often Shiva and Vishnu. In the latter stages of the empire, a number of Khmer kings adopted Buddhism, so some temples were modified or built to honour Buddha. Khmer temples also often functioned as official state buildings (similar to parliament buildings today) and even cities. Each temple reflected the power and importance of the king who built it, reinforcing his authority as both a political and spiritual leader.

The Khmer believed that each temple functioned as a type of palace or home for the god it was built to honour. They believed that the spirit of this god inhabited the temple in the form of a stone statue or polished stone, known as a *linga*.

Large temples could be home to several gods, so these often featured many linked shrines, with the shrine at the centre dedicated to the most important god. Temples built in this style were designed to represent the universe surrounded by ocean. This type of temple building also featured 'temple-mountains', a famous feature of Khmer architecture. The central temple (*prasat*) represented Mount Meru, a sacred mountain for Hindus and Buddhists. It was surrounded by smaller mountains (additional buildings or temples) and oceans (rectangular moats). The further away from the main *prasat*, the less decorative the enclosures became.

Source 22 A sandstone statue of Vishnu from the ruins of the Prasat Rup Arak Temple, Cambodia

Source 23 A *linga* within the walls of Angkor Wat



Source 24 An artist's impression of a skilled Khmer artisan creating a decorative sandstone carving on the wall of the Bayon Temple at Angkor Thom

Source 25
Laterite rocks in soil

Temple-building techniques

The main materials used to build temples throughout the Khmer Empire were brick, sandstone and a kind of clay called laterite (see Source 25). Timber was also used occasionally for roofs and ceilings.

Earlier temples tended to be built from brick – a simple product that was easy to make. Bricks were made of clay that had been fired at high temperatures to make them hard. When they were laid, they were held together with a kind of vegetable glue. This glue made the brickwork very strong. Sometimes the brick was carved, but more often any decoration was done in stucco – a kind of plaster that can be moulded and shaped.

The use of sandstone increased over time, so it is seen more in temples built from the tenth century CE onwards. Much skill was needed to cut and decorate the sandstone, and it required many people to quarry (extract from a mine) and transport it. Sandstone blocks were stacked on top of each other without mortar or glue.

The advantage of sandstone was that it was a very easy material to carve and decorate. However, sandstone was far more expensive than brick, so only the most important temples were made entirely of it.

The other main building product, laterite, was a special kind of clay containing large amounts of iron. When it was formed into blocks and exposed to the air, it became very hard – without the need for firing. Like sandstone, laterite blocks were not joined together with any kind of mortar or glue. They tended to be used in foundations of buildings because they could not be carved or decorated easily.

Think, pair, share
- Think about how the Khmer craftspeople were able to develop their temple-building techniques.
- Discuss your ideas with a partner.
- Share your thoughts with the class.

Advances in building techniques and features

Khmer builders were skilled craftspeople and artists. Across the empire, they developed many building techniques and decorative features that have survived to this day. Like the Romans, the Khmer knew how to make arches. Unlike the Romans, however, the Khmer built corbel arches (rather than a very strong type of arch called a keystone arch). A corbel arch (see Source 26) is built by stacking two columns of stone on either side of an opening. Once the desired height is reached, each new layer of stone on either side is offset so that it juts out a little more than the last one, until the whole structure meets in the middle. Without mortar, it is not an especially strong arch, but it allowed the Khmer to achieve stunning architectural feats with their buildings.

Other significant features that can be found in Khmer temples include decorative lintels (horizontal stone beams over doorways) and pediments (triangular stone shapes above lintels), as shown in Source 27.

It is clear from the sources in this chapter that Khmer temples were often covered with intricate and complex stone-carvings honouring important gods and Khmer kings. What is less commonly known, however, is that these temples were originally also brightly painted. As a result of detailed investigations, historians have uncovered traces of these paints at Angkor Wat and a number of other temples. What we now see as plain stone once may have been very colourful.

13.6 CHECK YOUR LEARNING

Review and understand

1 **Identify** three materials used to construct temples during the Khmer Empire.

2 **Identify** the purpose of temples built during the Khmer Empire.

3 What is Mount Meru? **Describe** how Mount Meru has influenced the design and construction of many Khmer temples.

Apply and analyse

4 **Explain** why temples are the most valuable source of evidence relating to the Khmer Empire.

5 **Summarise** how temples symbolise the values and perspectives of the Khmer Empire.

Evaluate and create

6 Using the information provided in this topic and your own research, **create** either a labelled diagram showing the basic layout of a typical Khmer temple, or a flow chart of the changes to temple building materials over time (include a reason for the change between each transition).

7 Using information from this topic and your own research, select one temple (other than Angkor Wat) and **construct** a tourist brochure that:

a tells visitors when it was built, why it was built and who built it

b informs visitors why it is an interesting and significant temple to visit

c provides a number of images of the temple, including a simple visitor map.

Source 26 This gateway at Angkor Thom is an example of a corbel arch.

Source 27 Decorative columns, lintels and pediments found at Angkor Wat show traces of the brightly coloured paints that once covered many Khmer temples.

13.7 Angkor Wat

In this topic, you will:

» outline the significance and religious symbolism of Angkor Wat.

Explore it!
A virtual field trip to Angkor Wat

Angkor Wat (meaning 'city temple') is the world's largest religious monument. It is located in the Angkor region, just north of Tonle Sap Lake. Angkor Wat is considered the Khmer Empire's most significant and lasting achievement – a masterpiece among all Khmer temples.

Source 28 Angkor Wat from above

Angkor Wat was designed and constructed at the peak of Khmer architecture and culture, during the rule of Suryavarman II. Suryavarman was devoted to the Hindu god Vishnu, who protects and brings order and harmony to the land. It was this spiritual belief that drove him to order the construction of Angkor Wat, which was completed around 1150 CE.

In 1177, Angkor Wat was raided by the Cham, who were the neighbouring enemies of the Khmer. It was not until the Khmer King Jayavarman VII defeated the Cham in 1203 that the empire was restored. At this point, Angkor Wat was converted to a Buddhist temple, as Jayavarman believed the Hindu god Vishnu had failed to protect his people. Many of the Hindu sculptures were replaced by Buddhist art.

Architecture

The architecture of Angkor Wat symbolises its grandeur as a replica of the Hindu universe. It has five distinctive towers, with the central tower reaching 70 metres in height. These towers represent the mythical Mount Meru, with its five peaks. The outer walls of the temple are 3.6 kilometres in length and represent the edge of the world. A 5-kilometre **moat** surrounds the site and represents the oceans beyond. The central shrine was believed to originally house a large statue of Vishnu, but over time most of its treasures have been stolen. However, there are still many stone carvings representing creatures from Hindu mythology such as the *garuda* – a half-bird, half-man creature on which Vishnu rode (see Source 30).

moat
a wide band of water surrounding a built structure such as a castle; it provided some protection in the event of attack

Source 29

One of these temples … erected by some ancient Michelangelo might take an honourable place beside our most beautiful buildings. It is grander than anything left to us by Greece or Rome, and presents a sad contrast to the state of barbarism in which the nation is now plunged.

Extract from French explorer Henri Mouhout, 1860

Source 30 A row of *garudas* carved into one of the stone walls at Angkor Wat

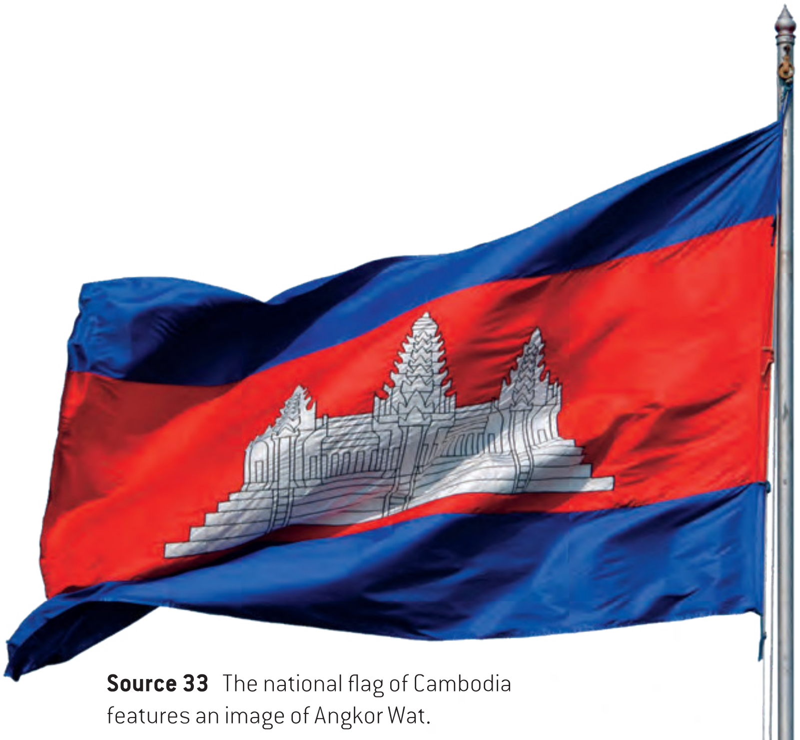
Analyse this!
Extract from Henri Mouhout

Source 31

At a first sight one is most impressed with the magnitude, minute detail, high finish and elegant proportions of this temple, and then to the bewildered beholder arise mysterious afterthoughts – who built it? When was it built? And where now are the descendants of those who built it? It is doubtful if these questions will ever be satisfactorily answered. There exist no credible traditions – all is absurd fable or extravagant legend.

Extract from Frank Vincent Jr., 'The Wonderful Ruins of Cambodia', *Journal of the American Geographical Society of New York* (1878), Vol. 10, p. 234

Source 32 Angkor Wat



Source 33 The national flag of Cambodia features an image of Angkor Wat.

Modern-day use

The people of modern-day Cambodia are very proud of their heritage. Khmer temples are so much a part of Cambodia today that an image of Angkor Wat is featured on the national flag (see Source 33). Angkor Wat is now protected as a World Heritage site and is a major tourist destination for international visitors. Despite the decline of the Khmer Empire, the site has been preserved as a temple and remains a significant religious centre for Buddhist pilgrims (people who travel to religious sites) from Cambodia, Myanmar (Burma) and Japan.

KEY CONCEPT
Evidence

The purpose of Angkor Wat

Due to the lack of primary evidence on the Khmer Empire, historians are often trying to fill in the gaps. Although all historians agree on the significance of Angkor Wat, many still argue over the exact purpose for which it was built. Despite all of the historical research that has taken place since Angkor Wat was rediscovered in 1860 (see topic 13.13 on page 13.45), historians still contest whether it was built as a temple, a tomb, an observatory – or all three. Source 34 outlines the evidence supporting each theory.

For more information on this key concept, refer to page 201 of 'The history toolkit'.

Source 34 The key arguments for each theory regarding the purpose of Angkor Wat

Possible purpose	Supporting evidence
Temple	• The temple clearly honours Vishnu, and the narratives in the stone carvings tell the story of Suryavarman II's reign, often symbolised as struggles between Vishnu and Krishna. • Angkor Wat was built in the same overall style and pattern of other Khmer temples.
Tomb	• The temple faces west, but most other temples in the area face east, indicating a different purpose. • The stone carvings progress in an anti-clockwise direction, instead of the more usual clockwise. The anti-clockwise direction was associated with Brahmin funeral rituals in Khmer culture. • A container was found in the central tower that may have been used to store the remains of the king.
Observatory	• If you stand at the western gate on the summer solstice before dawn, the sun rises directly over Angkor Wat's central tower. • Careful measurements of the temple show that the most common measurements relate to things such as the exact length of the solar year. • The name Suryavarman means 'protector of the sun'.

Source 35 A Buddhist monk performing a ritual at Angkor Wat

13.7 CHECK YOUR LEARNING

Review and understand

1 **Identify** the half-bird, half-man creature in Hindu mythology.

2 **Describe** why Angkor Wat was converted to a Buddhist temple. What happened to cause this?

Apply and analyse

3 **Explain** the significance of Angkor Wat to the Khmer Empire. Use the 5Rs (see page 212 of 'The history toolkit') to help structure your response.

4 **Examine** Source 31.

a **Outline** the tone of voice used in the source. Provide an example.

b **Summarise** the opinions or impressions the writer formed of the Khmer Empire.

c Using the concept of continuity and change, **explain** how this source is still relatable today.

Evaluate and create

5 Read Source 34. Which purpose do you think is most likely? **Justify** (give reasons for) your answer.

Source 36 A sandstone sculpture of a *garuda*

13A RICH TASK

The Khmer Empire's physical features

Situated around Tonle Sap Lake, the Khmer Empire was able to benefit greatly from the seasonal floodplain (area of land prone to flooding) of the Mekong River, which ensured a stable supply of fresh water.

Furthermore, the empire was well protected due to a variety of physical features. First, two rugged mountain ranges along the western coastline called the Cardamom Mountains and the Elephant Mountains helped to prevent any naval forces attacking the Empire. Second, the thick dense rainforest surrounding the northern and eastern sides of the Tonle Sap area provided another barrier to any land forces.

Source 37 An aerial image of Cambodia, that highlights the relief (shape) of the land; it has been coloured to show the prominent vegetation

Quizlet

Revise the key terms you have learnt so far.

PHYSICAL FEATURES OF PRESENT-DAY CAMBODIA

Source: Oxford University Press

Source 38 This map of present-day Cambodia shows its rivers, lakes, borders and capital city. It also includes grassland, shrubland, forest, mountains and the sea floor.

KEY SKILL
Analysing cause & effect

Analysing a map

Maps are geographical representations of all or part of the Earth's surface. They show a group of features in terms of their relative size and position. They use a system of symbols, governed by a set of conventions (accepted rules), to communicate a sense of place. You may think that maps are only useful in geography, but they are also an important source of primary information for historical inquiries. It is therefore important to be able to understand and analyse maps, so that you can use information from them as evidence.

Use the information below to help you understand the information provided on maps:

- **Orientation:** It is a convention for cartographers (map-makers) to place a north point on maps. This helps the reader to establish position and direction.
- **Title:** Like a newspaper headline, the title of a map should tell the reader 'what', 'where' and 'when' about the map. The date should help the reader fit the map into its proper chronological period. (Note: the date in the title may not be the date the map was created.)
- **Legend:** This is a key that explains the symbols used by the cartographer. To visualise reality, you need to be able to convert various shapes, colours and textures into the features they represent.
- **Scale:** This is the proportion of the map to the ground. It helps the reader to judge actual distances. Scale is most often shown as a linear measure (for example, 1 centimetre on the map represents 100 kilometres of actual distance).
- **Grid:** Maps often show parallels of latitude and meridians of longitude, so that the area can be placed in its proper geographic location on the globe.

For more information on this key skill, refer to page 208 of 'The history toolkit'.

Practise the skill

1 **Examine** Sources 37 and 38.
   a Use the legend in Source 38 to **identify** the different landscapes and physical features of Cambodia. List all your observations in point form.
   b Note the different landscapes and geographical features shown in Source 38. How many are there? Which of these features act as natural barriers? Which of these are useful for developing agriculture?

2 **Create** your own map of Cambodia.
   a In your notebook, copy (or trace) the main physical features of the aerial image in Source 37 and the map in Source 38. Include the modern-day borders of Cambodia, major rivers, lakes, vegetation types and mountains. Make sure you also include 'BOLTSS' – border, orientation, legend, title, scale and source.
   b **Research** the extent of the Khmer Empire at its peak. Think of an appropriate symbol or legend to represent the empire, and then add it to your map.
   c Add the location of the Angkor region to your map.
   d **Apply** the concept of cause and effect by annotating the features on your map that significantly influenced the settlement and lifestyle of the Khmer people.

Extend your understanding

1 Conduct some **research** online to find a climate graph of Cambodia.
   a **Analyse** the graph by studying the change in temperature across the year and the change in rainfall throughout the year. Write a paragraph explaining what seasonal trends you see, and reporting figures such as the maximum and minimum levels of each.
   b **Outline** the cause and effect of the climatic conditions on the establishment of the Khmer Empire.

2 **Research** the floating markets of the Mekong River. Places such as Chau Doc on the border of Cambodia and Vietnam are a modern-day example of the Khmer lifestyle. Create a collage poster of images, comparing the continuity and change of a modern-day floating market to life during the Khmer Empire.

13.8 Village life in the Khmer Empire

In this topic, you will:

- examine the main features of the water management system in the Khmer Empire
- explore the way of life in a Khmer village.

During the early days of the Khmer Empire, people used agriculture not only to feed a growing population, but also to trade and become extremely wealthy. The heart of the Khmer agricultural system was the Mekong River and Tonle Sap Lake, and villages were established all around the floodplains of the lake. Together with the inventiveness and hard work of the Khmer people, these two water sources enabled farmers across the empire to harvest vast amounts of rice. Tonle Sap Lake was also the centre of the fishing industry.

Source 1 A reservoir known as the West Baray, constructed in the eleventh century CE

Water for rice cultivation, transport and trade

I used to think, now I think

Reflect on your learning about the agricultural practices that were key to the success of the Khmer Empire and complete the following sentences.

- I used to think ...
- Now I think ...

What has changed in your understanding?

The ability of the Khmer people to exploit, direct and control the waters of the Mekong River and Tonle Sap Lake was key to the empire's success. When the Mekong River flooded during the wet season, Tonle Sap Lake would swell to cover an area of around 10 000 square kilometres. Once it was full, the Khmer would channel water from the lake into a sophisticated network of reservoirs (known as barays) and canals, so that it could be stored and used throughout the dry season when there was very little rain. This enabled the Khmer to harvest rice three or four times per year, while most other civilisations across South-East Asia could produce only one or two harvests.

At the peak of the Khmer Empire, it is thought that farmers planted over 50 million fields of rice. The water management system was vital to the growth of these crops. The Angkor region could at times suffer from drought, so it was vital to maintain a constant supply of water to keep the crops growing.

Source 2 Many canals built during the Khmer Empire remain in use today. This one links the West Baray with a number of Cambodian villages.

Source 3 Rice production continues today in Cambodia much as it did during the time of the Khmer Empire. These farmers are harvesting a rice field close to Angkor Wat.

Source 4 Water served an important religious role in the Khmer Empire. It was used to fill the moats of temples like the one surrounding Angkor Wat.

Fish could be allowed into this canal system, which meant a plentiful supply of food that was easily available to people living in the rice-growing areas. This created a thriving economy across the Angkor region.

Until late in the Khmer Empire, there were very few roads available for transport and trade. Instead, the Khmer used the canals and rivers across the Angkor region to travel and transport goods by boat.

Trade within the empire occurred at marketplaces, which were large open squares where traders sat on straw mats to sell their produce. A levy, or tax, was paid to officials in order to secure a space. Chinese ambassador Zhou Daguan's description of the marketplace in 1296 (see Source 5) noted that it was mainly women who ran the market.

The modern-day countries that were once part of the Khmer empire are to this day world leaders in regard to female participation in trade.

Source 5

> The local people who know how to trade are all women. So when a Chinese goes to this country, the first thing he must do is take in a woman, partly with a view to profiting from her trading abilities.
>
> Extract from Zhou Daguan, *A Record of Cambodia*, 1296

Water for religion

The water management system across the Angkor region was a great achievement in terms of food production and the economy, and also served an important religious function for the Khmer people. To the Khmer, the power of the Mekong River was godlike. Recent archaeological discoveries suggest that the waters provided by the monsoon rain and the great river were considered sacred.

Analyse this!
Zhou Daguan on trade

Water was used not only to grow rice crops, but also to fill the moats that surrounded Khmer temples (such as Angkor Wat: see Source 4) and royal buildings. Water was channelled to parts of the empire where new temple building was taking place in order to support the growing numbers of people who had moved there to work on the construction. The barays were fed water through a series of dams and channels. Often the barays were constructed before any temple-building began. This ensured that the people building the temples had a constant supply of food and water.

The regular supply of water increased the size of local rice crops and led to increased trade. This made the empire wealthier and enabled the kings to build even more temples and religious monuments.

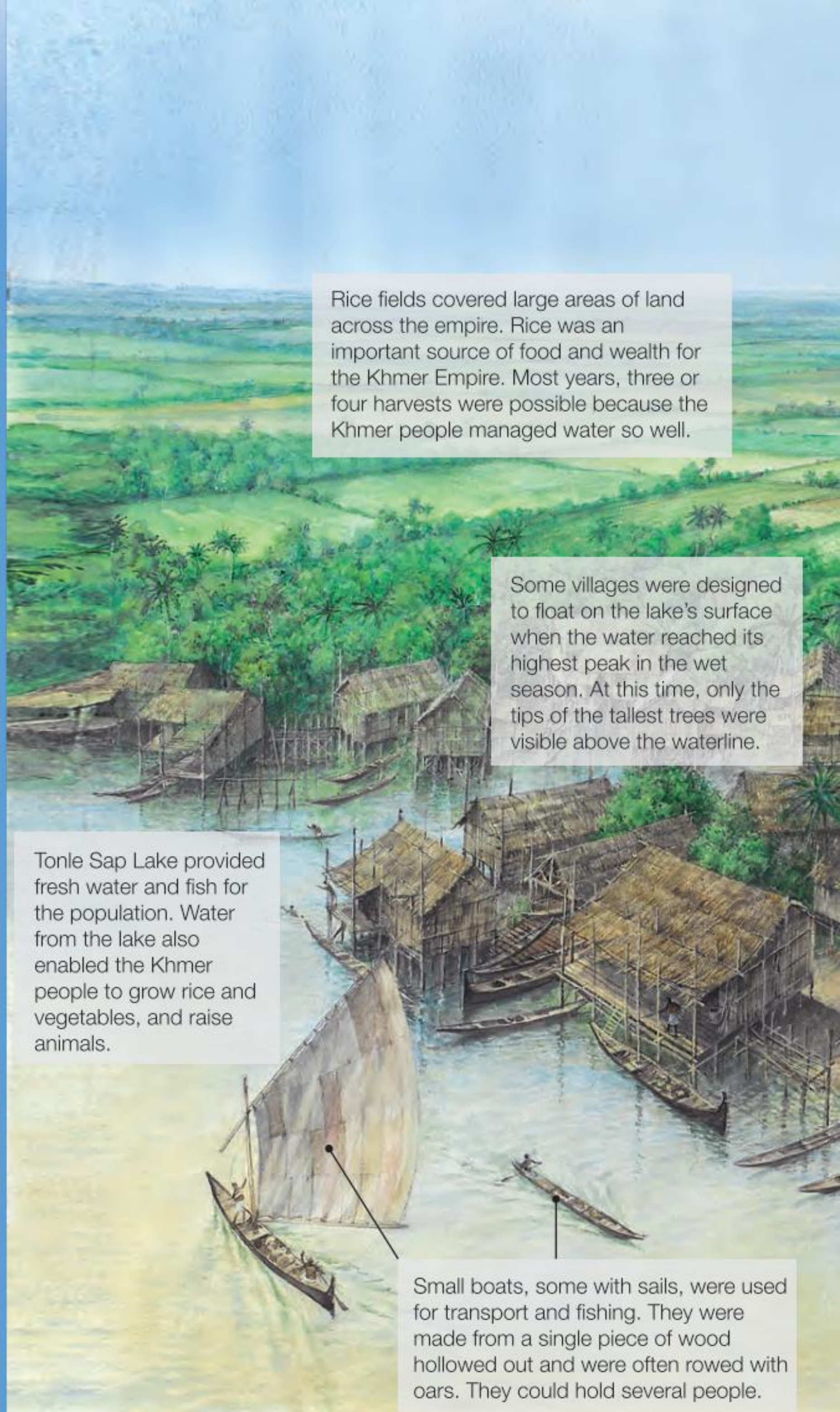
By using ground-penetrating radar, modern archaeologists have been able to uncover a vast network of channels and moats built during the Khmer Empire that had been covered by the jungle or built over by later generations.

Daily life in the Khmer Empire

The artist's impression in Source 6 shows a village on the banks of Tonle Sap Lake during the Khmer Empire. A large part of what we know about village life in Angkor comes from the writings of Zhou Daguan, a Chinese ambassador who visited the Angkor region in 1296. According to his writings, the weather influenced daily life in Angkor dramatically – from what people wore and ate, and the systems they put in place to store and move water, to the way in which they built their houses.

Tonle Sap Lake was an essential part of life for the Khmer people. The water level of the lake could rise to 9 metres during the wet season. During the dry season, it could fall to as low as 1 metre. This meant that some houses built on the edge of the lake had to be built on stilts to be above the water level during the wet season. Others were designed to float on the surface of the water.

For peasants and farmers, daily life consisted of fishing on the lake in communal 'house ponds', tending to animals, and tending to the rice fields.



Source 6 An artist's impression of daily life in the Khmer Empire

Interactive
Daily life in the Khmer Empire

13.8 CHECK YOUR LEARNING

Review and understand

1 **Describe** how the Khmer people controlled the waters of the Mekong River and the water that fell as rain during the monsoons. Use specific terms (such as 'canal').

2 **Describe** the construction of houses in a Khmer village.

Apply and analyse

3 **Explain** how moats and barays were used by the Khmer people.

4 **Explain** why a Chinese ambassador is so important to our understanding of daily life during the Khmer Empire.

5 What modern technologies are archaeologists using to locate channels and moats constructed during the Khmer Empire? **Summarise** what the location of these channels and moats might tell historians about the Khmer Empire.

Evaluate and create

6 **Evaluate** whether the water management system built across the Angkor region was a significant achievement. You can use the 5Rs of historical significance to structure your response (see page 212 of 'The history toolkit').

7 **Create** a concept map that shows the many uses and flow-on effects of water in the Khmer Empire.

13.9 The structure of Khmer society

In this topic, you will:

- distinguish between the different roles of key social groups in the Khmer Empire
- consider how the social structure shaped daily life in the Khmer Empire.

Quiz me!
A quick quiz on the structure of Khmer society

Like many societies across the ancient world, the Khmer Empire was organised according to a strict hierarchy, where each group within society had certain rights and duties they were expected to perform. Khmer society was organised around the king and the village temples, where political and economic decisions were carried out.

Khmer kings

At the very top of Khmer society was the king. From the time Jayavarman II had himself declared *chakravartin* ('ruler of the world') in 802 CE, the Khmer kings served both as political and religious leaders.

Revered as *devaraja* ('god-kings'), Khmer rulers were believed to have the powers of both gods and kings. They were the source of all legal and religious power. Members of lower social groups, such as the nobles and officials, swore an oath of loyalty to the king. There was the threat of eternal punishment if they broke this oath.

Source 7 This stone carving found on the wall of the Bayon Temple at Angkor Thom shows a Khmer king at his royal palace.

The king, in turn, was expected to respect his people and their social positions, and to acknowledge the local rulers within his kingdom.

The king was the main force behind the creation of public buildings and works. These projects were carried out to guarantee the prosperity of the country and to show the power of the king and the empire. Temples were generally dedicated to Hindu gods, such as Shiva and Vishnu. It was good for the king's authority and reputation for him to be associated with these gods.

Nobles and officials

The next most powerful group in the social hierarchy of the Khmer Empire was the nobles and officials. Much of this group was made up of the king's family and relatives. Most of the administrative work across the empire was carried out by these people.

Local nobles and officials in each part of the empire managed their land through the village temples. The priests of each village temple collected crops from the local farmers (as taxes) and provided a storehouse for grain. These village temples, in turn, provided support to the local farmers. Across the empire, this network of village temples reported to bigger regional temples, and these regional temples ultimately reported to a central temple linked to the king.

Artisans and professionals

The next group in the social hierarchy was artisans and professional workers, such as architects, merchants, fishermen and skilled craftsmen. This was a very small group in society, and very little information relating to them has been uncovered by historians.

Peasants

Peasants made up the largest group in Khmer society by far. Most of the evidence we have today about this group comes from stone carvings on temple walls. Most were rice farmers or workers who were forced to work and pay taxes in the form of grain to nobles, through the temple priests. They were also required to serve in the military and provide labour for building projects if so ordered by the king.

Most peasants lived in simple houses made of wood with thatched roofs. Many of these houses were grouped around communal ponds ('house ponds') that were a shared source of fish. Most peasant houses near Tonle Sap Lake were built on stilts, while others were designed to float. This ensured they were not washed away during the wet season.

Source 8 A sandstone statue of Vishnu (in a horse-headed incarnation), from the pre-Angkor period

Source 9 This stone carving found on the wall of the Bayon Temple at Angkor Thom shows a group of slaves captured during a war, being transported in restraints.

Slaves

At the bottom of the Khmer social hierarchy were slaves. Although it is difficult to estimate the number of slaves and the size of this social group in Khmer society, we do know that there were a number of different types of slaves. The first type of slaves were foreign prisoners of war captured during Khmer battles with rival kingdoms; the second type of slaves were bought and sold legally or forced into slavery in order to pay debts they owed; and the third type of slaves lived and worked at temples and were considered the property of those temples.

Source 10

> The women age very quickly, no doubt because they marry and give birth when too young. When they are twenty or thirty years old, they look like Chinese women who are forty or fifty.
>
> Extract from Zhou Daguan, *A Record of Cambodia*, 1296

Women in Khmer society

Unlike many other societies around the world at this time, the position of women in most social classes during the Khmer Empire was relatively strong. Zhou Daguan commented on the strength of the position of Khmer women and their social freedoms in his writings on the Khmer Empire in 1296. He observed that they could inherit land and property, and that some held political posts, including positions as judges. The king's personal bodyguards were women, for instance, as it was believed that women were more trustworthy and loyal. Zhou Daguan also noted that such hard work impacted on their appearance (see Source 10).

13.9 CHECK YOUR LEARNING

Review and understand

1 **Describe** how society was organised during the Khmer Empire. How many social classes were there?

2 **Describe** the responsibilities and freedom of women during the Khmer Empire. Were women in a strong social position for the time?

Apply and analyse

3 What was the largest single social group in Khmer society? **Summarise** the roles and responsibilities of these people.

4 **Explain** how nobles and officials administered their land. How were peasants expected to pay taxes to these nobles and officials?

Evaluate and create

5 In small groups, **create** and perform a role-play that captures daily life in Khmer society. Choose a scenario below or create your own. Try to include a few different social groups.

- peasants – paying taxes to the temple priest and providing labour for the king's projects
- artisans – meeting with a local noble while constructing a temple and ordering slaves to complete certain jobs
- the king – giving an 'oath of loyalty' ceremony for some nobles and military, with a priest leading rituals to the Hindu gods throughout.

13.10 Daily life for the rich and poor

In this topic, you will:

- distinguish between the standard of living of different social groups in the Khmer Empire
- explore the perspective of the Chinese ambassador Zhou Daguan.

There are no surviving written records kept by the Khmer people about daily life in their empire. Instead, the only written records that exist are those written by Zhou Daguan, a Chinese ambassador. From his writings in 1296 we have been able to learn about the daily lives of different groups in Khmer society, from the king and nobles right down to the peasants and slaves.

Clothing

Both men and women in Khmer society went bare-chested and barefoot. Their clothing was simple, and mostly consisted of a cloth wrapped around the waist. Although ordinary women wore no hair ornaments, they could wear jewellery such as golden rings and bracelets. If women were particularly beautiful, they might be sent to the court to serve the king or the royal family. In his writings, Zhou Daguan describes the type of clothing worn by a number of social groups.

Source 11

> From the king down, the men and women all wear hair wound up in a knot, and go naked to the waist, wrapped only in a cloth. When they are not out and about, they wind a larger piece of cloth over the small one.
>
> Only the king can wear material with a full pattern of flowers on it. On his head he wears a gold crown … Sometimes he goes without a crown, and simply wears a chain of fragrant flowers such as jasmine wound round the braids of hair. Around his neck he wears a large pearl weighing about four pounds [approximately 2 kilograms]. On his wrists and ankles and all his fingers and toes he wears gold bracelets and rings …
>
> Extract from Zhou Daguan, *A Record of Cambodia*, 1296

Source 12 A Cambodian man wearing a *krama* – a traditional headcloth

Housing

From Zhou Daguan we also gain some insight into the way ordinary people lived in their homes.

Source 13

> At the lowest level come the homes of the common people. They only use thatch for their roofs, and dare not put up a single tile. Although the sizes of their homes vary according to how wealthy they are, in the end they do not dare emulate [copy] the styles of the great houses …
>
> Extract from Zhou Daguan, *A Record of Cambodia*, 1296

Analyse this! Zhou Daguan on housing

Food

From the early days of the Khmer Empire, and even well before, rice and fish formed the staples of the Khmer diet. In addition to these, the Khmer kings and officials also ate a number of tropical fruits and vegetables, such as bananas and melons. Stone carvings on the Bayon Temple at Angkor Thom show scenes of pigs being slaughtered and eaten. Kings, nobles and officials may also have had their food served to them on gold or silver plates. There is even some evidence to suggest that they may have used cutlery, although some historians contest this.

For other groups in society, the types of foods prepared and the way in which they were eaten was much simpler. Zhou Daguan gives us a good understanding of the ways in which ordinary people cooked and ate in their homes.

Source 14

> Ordinary families have houses but nothing else by way of tables, chairs, jars, or buckets. They use a clay pot to cook rice in, and make sauce with a clay saucepan. For a stove they sink three stones into the ground, and for spoons they use coconut husks … When serving rice they use clay or copper dishes from China; sauce comes in a small bowl made from the leaves of a tree, which doesn't leak even when it is full of liquid. They also make small spoons from the leaves of the nypa palm, which they spoon liquid into their mouths with, and throw away after using.
>
> Extract from Zhou Daguan, *A Record of Cambodia*, 1296

Source 15 An artist's impression of how Khmer kings and nobles may have lived and eaten

Source 16 An artist's impression of how Khmer peasants may have lived and eaten

Health in the Khmer Empire

KEY SKILL Analysing sources

Historical sources often convey the creator's perspective about an issue or event. When studying a topic, historians aim to understand a wide variety of perspectives. This ensures their knowledge is as balanced as can be. It is an important skill to be able to identify and describe these elements in sources.

There are three key elements to look for when analysing perspective: context, opinions and inferences (see Source 17). Where possible, it is useful to highlight or colour-code the source according to each element (see Source 18).

Source 17 The three things to look for when analysing perspective are context, opinion and inference.

What to look for	Explanation
Context	Context is the situation in which the source was produced. What background information do you have about the creator of the source and their society at the time? How would you feel if you were in the creator's shoes?
Opinions	Ask yourself, what opinions are expressed in the source? Sources can show a bias when they convey strong thoughts or feelings which are one-sided. If the source is written, ask yourself which specific words or phrases show the writer's attitudes and feelings. This is called *emotive language* as it causes people to feel strong emotions. Visual sources can also make you feel strongly.
Inferences	An inference is an indirect message or perspective that is implied (hinted at) in the source but not stated outright. People do not always spell out what they are thinking. The reader needs to use clues in the text to 'read between the lines' and infer meanings. The creator's attitude towards something can usually be inferred by what is written and how it is expressed.

Source 18

Context: The name of the place is given.

Context: Travelling in a foreign country

Opinion: Emotive language suggests a strong opinion.

The people of Cambodia often cure themselves of many illnesses by plunging into water and washing the head again and again. Nevertheless, the traveller meets many lepers along the way. Even when these unfortunates sleep and eat among their fellow-countrymen, no protest is made. By some it is said the leprosy is the outcome of climatic conditions. Even one of the sovereigns (kings) fell victim to the disease, and so the people do not look on it as a disgrace … As in our country, drugs can be brought in the market; of these, with their strange names, I have no knowledge. There are also sorcerers who practise their arts on the Cambodians. How utterly absurd!

Inference: He feels sympathy for them.

Inference: This adverb suggests he is surprised or it is unusual.

Inference: They are not a common item in his home country.

Extract from Zhou Daguan regarding how the Khmer society coped with illness, in *A Record of Cambodia*, 1296

Continued on next page

Source 19

Filled with a deep sympathy for the good of the world, the king swore his oath: 'All the beings who are plunged in the ocean of existence, may I draw them out by virtue of this good work. And may the kings of Cambodia who come after me, attached to goodness … attain with their wives, dignitaries and friends the place of deliverance where there is no more illness.'

An inscription on a wall of a hospital built by Jayavarman VII, explaining why he built it; extract from D. P. Chandler, *A History of Cambodia*, Silkworm Books, 1993

Document
Source 19 (Extract from D. P. Chandler)

Continued from previous page

Source 19 is a translation of an inscription on the wall of a hospital. There were over 100 hospitals and 100 rest houses (shelters with fires) developed by King Jayavarman VII. Known as *arogayasalas*, they all had the same temple design and were part of a massive infrastructure project following a devastating war with the Cham. Many of the ruins are still scattered throughout north-east Thailand (see Source 20, for example).

For more information on this key skill, refer to page 213 of 'The history toolkit'.

Source 20 The ruins of an *arogayasala* located on the border of Cambodia and Thailand

Practise the skill

1. **Summarise** the perspective of Zhou Daguan in Source 18. Provide examples to support your answer.
2. Highlight the three key elements – context, opinions and inferences – on a copy of Source 19, and add annotations. Source 19 is available as a printable document on your obook pro.
3. **Summarise** the perspective conveyed in Source 19. Provide an example to support your answer.
4. Using Sources 18 and 19, **summarise** the perspective of Khmer society towards health and illness.

13.10 CHECK YOUR LEARNING

Apply and analyse

1. **Distinguish between** the lifestyles of the rich and the poor in Khmer society. Remember, when you distinguish between two things you must talk about how they are different. List at least five examples.
2. **Analyse** Source 11. Use the 'DAMMIT U' structure (see page 216 of 'The history toolkit') to help structure your response. Remember to think of both the strengths and weaknesses of the source when discussing usefulness.
3. **Summarise** Zhou Daguan's perspective towards ordinary families in the Khmer Empire.
4. **Examine** Source 18. According to Zhou Daguan, how did social distinctions change when it came to health and illness?

Evaluate and create

5. **Create** an illustration of the king's clothing, according to Source 11. Annotate the features you have included.

13.11 Religion in the Khmer Empire

In this topic, you will:

» outline the religious beliefs, values and practices that the Khmer people lived by.

Perhaps more than any other single factor, religion had the greatest influence on Khmer society. It affected the way society was organised, the types of buildings that were constructed, and the way people chose to live their lives.

Animism

Long before the rise of the Khmer Empire, the people of South-East Asia who settled along the Mekong River and around the edge of Tonle Sap Lake worshipped spirits of the natural world. This belief system, known as **animism**, involved the worship of all living things (such as animals, humans and plants) as well as natural phenomena (such as the wind, rain and sun). In particular, the Khmer people worshipped the spirits of their ancestors by making offerings of food, flowers and wine in order to please them. Although this type of spirit worship continues in a small way to this day, from around 100 BCE, religions brought by traders from India and China – who were moving through the region – spread across South-East Asia.

animism
a belief system teaching that all creatures, objects and places have a spirit

Quiz me!
A quick quiz on religion in the Khmer Empire

Source 21 A twelfth-century statue of the Hindu god Vishnu at Angkor Wat; during the time of the Khmer Empire, it was the responsibility of temple priests to care for statues like this one that were believed to be inhabited by the spirit of the gods.

Hinduism

Over many hundreds of years, the Indian religion of Hinduism spread across parts of South-East Asia, including the Mekong River area. While historians think that Buddhism was more popular in the early Khmer kingdom of Funan, Hinduism became the main religion in the kingdom of Chenla, which later became part of the Khmer Empire. For the next 400 years Hinduism was the dominant religion of the Khmer Empire.

At the time the Khmer Empire was founded, historians believe that Hinduism may have seemed like an attractive belief system to the Khmer people, mainly because the Indian traders who visited their region were prosperous, and brought with them evidence of an advanced and cultured society. While we cannot be sure of their reasoning, we do know that it was around this time that the Khmer people began to build temples to the Hindu gods.

Although Hinduism is a religion with many different gods, the beliefs of the Khmer people focused particularly on a group of three Hindu gods:

- Brahma is the god of creation.
- Shiva is the god of destruction and re-creation.
- Vishnu is the god who protects, bringing order and harmony to the land.

Source 22 Aspara carvings decorating temple walls at Angkor Wat

Hindus believe that their gods live on a sacred mountain (known as Mount Meru) in the Himalayas, surrounded by seven seas. These gods are protected and cared for by dancing female spirits known as apsaras (see Sources 22 to 24).

Evidence of the influence of Hinduism on Khmer society can be seen in the many stone temples, carved inscriptions and religious monuments found all across the Angkor region today. Inscriptions were often written in Sanskrit (the sacred language of Hinduism), and countless stone carvings of Hindu gods and apsaras decorate the temple walls.

The Khmer people believed that the gods controlled every aspect of life. They consulted the gods on all matters – from the best time to plant and harvest crops to the best person to marry.

KEY CONCEPT
Continuity & change

Aspara dance

According to Hindu beliefs, apsaras are dancing female spirits believed to care for Hindu gods at Mount Meru. They are depicted on stone carvings in many of the temples in the Angkor region, with some temples having dedicated halls for them. Asparas were believed to entertain and distract anyone who threatened the peace or power of the Khmer kings or the Hindu gods.

Asparas represented water and clouds, and could shape-shift. To symbolise their abilities, an aspara dance was developed and performed for the king. This dance was very graceful in movement to mimic the asparas, with many intricate gestures narrating religious myths and legends.

Source 23 An aspara dancer at Angkor Wat

The dancers wore elaborate silk costuming, jewellery and golden headdresses. Depictions of this clothing can be seen in the stone carvings at Angkor. The golden headdresses represent the iconic 'temple-mountains' of the Angkor region (see topic 13.6 on page 13.16).

In the 1940s, this tradition was revitalised by the Royal Cambodian Ballet and the aspara dance was performed at sacred ceremonies or state events. The prima ballerina (lead female dancer) toured internationally as an aspara dancer, showcasing Cambodia's culture. However, the Khmer Rouge communist party almost destroyed the tradition in the 1970s, after carrying out mass murders on those who practised traditional arts.

Surviving dancers ensured that the heritage of the dance was taught to the next generation. It is now considered a centrepiece of Cambodian culture and the national identity and is also a significant tourist attraction.

For more information on this key concept, refer to page 200 of 'The history toolkit'.

Source 24 Aspara dancers at Preah Khan Temple

Buddhism

Although Buddhism had existed across South-East Asia for as long as Hinduism, it was not until Jayavarman VII came to power in 1181 that it became an official religion of the Khmer Empire. Like Hinduism, Buddhism is a religion that originated in India. It was founded by an Indian prince named Siddhartha Gautama, who would later become known to his followers as Buddha. Buddhists believe that to end pain and suffering, a person must work towards spiritual enlightenment through cycles of reincarnation (rebirth). On reaching this state of enlightenment (known as Nirvana) a person is freed from all the pain and bad things associated with being human. There are two main schools of Buddhism – Theravada Buddhism (the oldest and strictest school) and Mahayana Buddhism (a later school). As Buddhism spread throughout Asia, it influenced the history, culture and thinking of many civilisations, including the Khmer Empire.

During his rule, Jayavarman VII, a follower of Mahayana Buddhism, ordered many Buddhist temples to be built. Despite his efforts, Mahayana Buddhism did not remain the state religion of the Khmer Empire after his death in 1218. Instead, Theravada Buddhism became the state religion, and it remains the official religion of Cambodia to this day.

Source 25 The Bayon Temple at Angkor Thom was built by Jayavarman VII as the official state temple of Mahayana Buddhism. The Bayon Temple is decorated with over 200 stone faces. Many historians believe that these faces represent a combination of the faces of Jayavarman VII and Buddha.

13.11 CHECK YOUR LEARNING

Review and understand

1 **Describe** how the religion of Hinduism was introduced to the Khmer Empire. Why do historians think this became a popular religion?

2 **Define** 'Nirvana'.

Apply and analyse

3 **Summarise** how the aspara dance has continued since the Khmer Empire and changed over time. Include in your summary what happened during the 1970s.

4 **Examine** Source 25.

a Many historians believe that the faces covering the Bayon Temple are a combination of two faces. Whose faces decorate the Bayon Temple?

b **Explain** why someone might have wanted to be portrayed in this way.

Evaluate and create

5 **Research** the key differences between Hinduism, Mahayana Buddhism and Theravada Buddhism. Create a presentation of your findings and present it to your class.

13B
RICH TASK

Quizlet
Revise the key terms you have learnt so far.

Understanding daily life in the Khmer Empire

Because historians have very few sources of evidence relating to what everyday life was like for people in the Khmer Empire, the sources that they do have become much more historically significant and valuable to our understanding. Stone carvings on temple walls depicting the activities of daily life, such as those from the Bayon Temple at Angkor Thom, are precious primary sources. Studying such sources closely in order to gather valuable historical evidence is an important skill for all historians.

KEY SKILL
Analysing sources

Analysing historical representations

Analysing historical images is a valuable skill to develop. When analysing a photograph, painting or stone carving, it is useful to look at the following features:

- **Check the composition of the work:** What is shown in the scene? How do we know what is happening? Is the entire scene or work shown, or just a section of it?
- **Identify any important figures:** Who is shown in the scene and why? How many figures are there? Are they depicted as individuals or are they all the same? Are any figures larger than others? If so, why might they be shown this way?
- **Look closely at the background:** Does the background provide information about where the action is happening? Is the setting clearly shown? Are there any other decorations?
- **Look for small details:** Are there any small details hidden in the scene? Examine clothing, tools, weapons, animals, buildings and other objects.
- **Look for anything unusual:** Are there any elements in the scene that are confusing – either because they are new to you, or because they do not fit your understanding of the period? Make a note of these and research them further, using other primary or secondary sources.
- **Try to identify attitudes, personal points of view or bias:** When analysing a scene or work of art, keep in mind that it may not necessarily be an accurate representation of what actually happened. Remember that while a particular artwork or representation might show common people, it was almost certainly commissioned (ordered and paid for) by someone with money (such as a king or nobleman) who may have been interested in making things look a certain way for their own interests.

For more information on this key skill, refer to page 213 of 'The history toolkit'.

Practise the skill

1 Sources 26 and 27 are photographs of stone relief carvings (meaning they have been sculpted into a flat surface of stone) on the walls of the Bayon Temple at Angkor Thom. Source 26 has been annotated for you. Your task is to **analyse** Source 27 in the same manner, taking into account the features described above and the questions you should be asking yourself. Source 27 is available as a printable document on your obook pro.

Document
Source 27 (A stone relief carving of Khmer troops going into battle)

Source 26 A stone relief carving of a Khmer market scene

Extend your understanding

1 Imagine you have been commissioned by your principal to make a mural of everyday life at your school, which is to be displayed next to the school's entrance. What would you include in your mural and what would you not include? Remember, the principal wants to display this at the front of the school, so consider what the purpose of the mural is.

2 Draw a design for the mural, and annotate it to **explain** the composition, choice of figures, background and details.

3 Once you have completed your design and explanation, reflect on what your school mural teaches you about ancient stone relief carvings, in terms of what is likely to be shown and what is unlikely to be shown. What types of things can we hope to learn from these Khmer carvings, and what kinds of things will we not be able to learn?

Source 27 A stone relief carving of Khmer troops going into battle

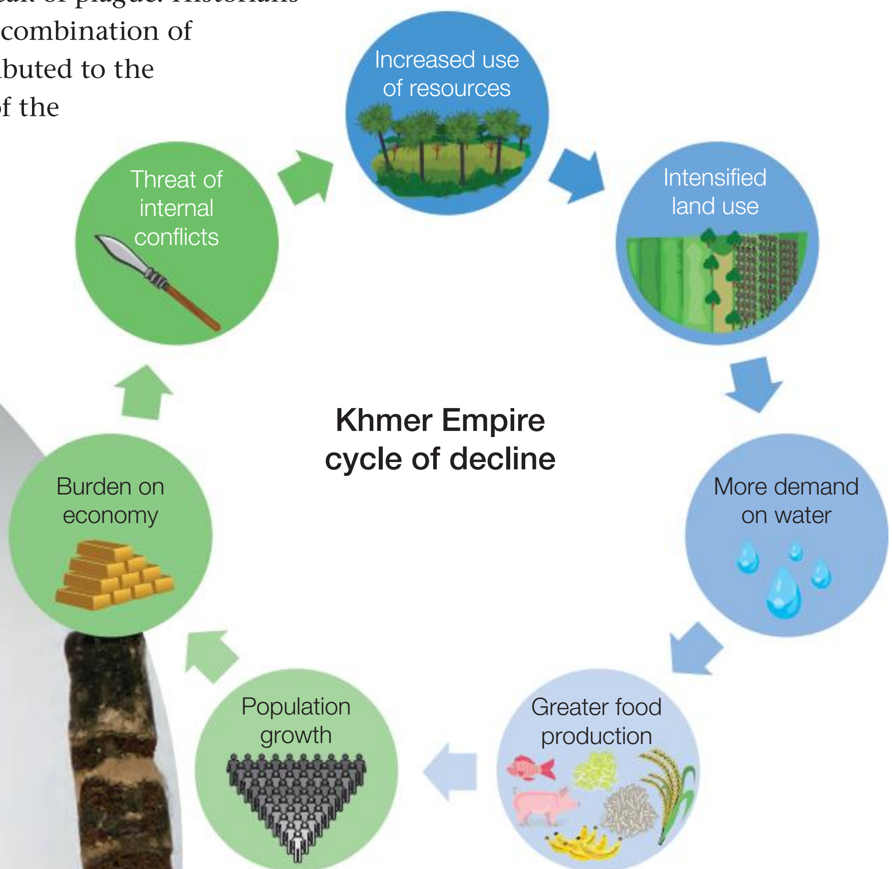
13.12 Internal challenges for the Khmer Empire

In this topic, you will:

- » outline the breakdown of the Khmer Empire's water management system
- » explore how economic and religious changes caused the Khmer Empire to decline.

Analyse this!
Khmer Empire cycle of decline

Time and time again over the course of human history, we see evidence of the rise and fall of mighty empires, and the Khmer Empire was no different. During the rule of Jayavarman VII, the Khmer Empire reached its peak, with a large rural population stretched over 5 million hectares; but after his death in 1218, the empire entered a period of slow decline that led to its fall in around 1431. Some of the challenges faced by the empire came from within the empire itself, such as the breakdown of the water management system, economic problems and changes in religion. Other challenges came from outside the empire (see topic 13.13), such as changes in the weather, wars and even an outbreak of plague. Historians now believe that a combination of these factors contributed to the eventual collapse of the empire.



Source 1 Historians believe the Khmer Empire may have entered a causal cycle of decline which involved environmental, social, economic and political factors.

Source 2 This Khmer statue of Buddha is in Sukhotai History Park, Thailand. Historians believe that changes in religion may have contributed to the fall of the Khmer Empire.

Breakdown of the water management system

The water management system across the Angkor region allowed the Khmer Empire to grow and thrive from early in its history. Water was crucial to trade, travel, communication and the irrigation of rice crops, so the failure of the system had serious consequences. Towards the end of the empire, it appears that changes made to the local environment (such as the clearing of forests for farming) affected the water that collected in the system.

Some historians argue that overpopulation caused unsustainable deforestation (decrease in forest areas), which affected the irrigation network in two ways. First, when forests are cut down, more water runs off the land into canals and rivers. This water carries large amounts of soil with it. As a result, the Khmer canals and irrigation channels became clogged with soil and silt (other fine materials). This is called 'soil sterilisation'. It eventually killed the fish that lived in the canals and reduced the amount of water available for irrigation. Historians also believe the stagnant water could have led to an increase in water-borne diseases and infectious outbreaks, such as malaria.

Second, from the thirteenth century onwards, historians believe the Khmer villages suffered from over-intensified land use, which degraded the land. The number of rice harvests possible each year dropped from three or four to one or two. Also, canals broke down, preventing the transport of crops. Without excess rice to trade, the prosperity of the empire declined.

In addition to this, extended periods of drought are thought to have caused serious problems for the water management system. Lack of water may have caused the canals to dry up completely and damaged many of the barays (reservoirs).

Source 3 After the fall of the Khmer Empire in around 1431, the city of Angkor was left largely abandoned. Many of the buildings – such as Ta Prohm Temple, shown here – were reclaimed by the forest.

Source 4 Historians believe that the breakdown of the water management system contributed to the decline of the Khmer Empire. Today, this farm – close to Tonle Sap Lake – once again has a reliable source of water.

Economic problems

During his rule, Jayavarman VII embarked upon a lavish building program, constructing a large number of temples, monuments, roads and hospitals. He also conquered many new territories, expanding the empire considerably. Thanks to these achievements, Jayavarman is remembered as perhaps the greatest Khmer king. However, these achievements came at a price.

The building program ordered by Jayavarman required finance, equipment and labour, and was enormously expensive. Added to the cost of the building projects was the cost of maintaining a large army to protect and defend the borders of the empire. A number of historians now believe that the physical and financial burden of both these investments ultimately contributed to the decline of the empire.

Quiz me!
A quick quiz on internal challenges for the Khmer Empire

Changes in religion

Many historians also believe that a shift in the religious beliefs of the Khmer people probably influenced the downfall of their empire. It is likely that this may have begun when King Indravarman II introduced Theravada Buddhism as the state religion in the late thirteenth century.

Theravada Buddhism caused a great deal of change across the Khmer Empire, as it meant that kings were no longer regarded as divine religious rulers, as they were under Hinduism. Theravada Buddhism taught that the king was just another human – required to lead a simple and peaceful life on the road to spiritual enlightenment.

As a result of this change, temple-building decreased because there was no longer a need to recognise Khmer kings and the achievements of their reigns. The new religion taught all people to seek enlightenment and to abandon unnecessary worldly items, so grand displays and opulent (luxurious) buildings such as temples were not needed.

Other unexpected consequences may also have resulted from this religious change. Up to this time, workers had been tied to their village temples and ultimately to the king. They were required to work and pay taxes to their temple in the form of rice. With the change in the king's social position, the belief in royal authority may have decreased – meaning workers may have felt less obliged to work for the king and the temple. This development would have had serious effects on social order and prosperity within the empire.

Source 5 Many historians believe that the introduction of Theravada Buddhism may have contributed to the fall of the Khmer Empire. It remains the official religion of Cambodia to this day.

13.12 CHECK YOUR LEARNING

Review and understand

1 **Identify** the king who adopted Theravada Buddhism. When did this take place?

2 **Describe** how economic problems contributed to the fall of the Khmer Empire.

Apply and analyse

3 **Summarise** why the authority and social position of the Khmer kings changed with the adoption of Theravada Buddhism as a state religion.

4 **Explain** why the number of temples being built may have decreased after the introduction of Theravada Buddhism.

5 Using Source 1, **analyse** the cause and effect of an unsustainable rural lifestyle in Khmer society (see page 208 of 'The history toolkit').

Evaluate and create

6 **Evaluate** which of the three internal challenges discussed (breakdown of the water management system, economic problems, changes in religion) would have most negatively impacted the Khmer Empire.

I used to think, now I think
Reflect on your learning about what contributed to the end of this empire, and complete the following sentences.
- I used to think ...
- Now I think ...

What has changed in your understanding?

13.13 External challenges for the Khmer Empire

In this topic, you will:

- explore how environmental conditions impacted agriculture
- evaluate how foreign challenges weakened the Khmer Empire.

Challenges facing the Khmer Empire were both intentional and unintentional. Some challenges were caused by humans, such as war and disease, while others were coincidental, such as a period of climatic change.

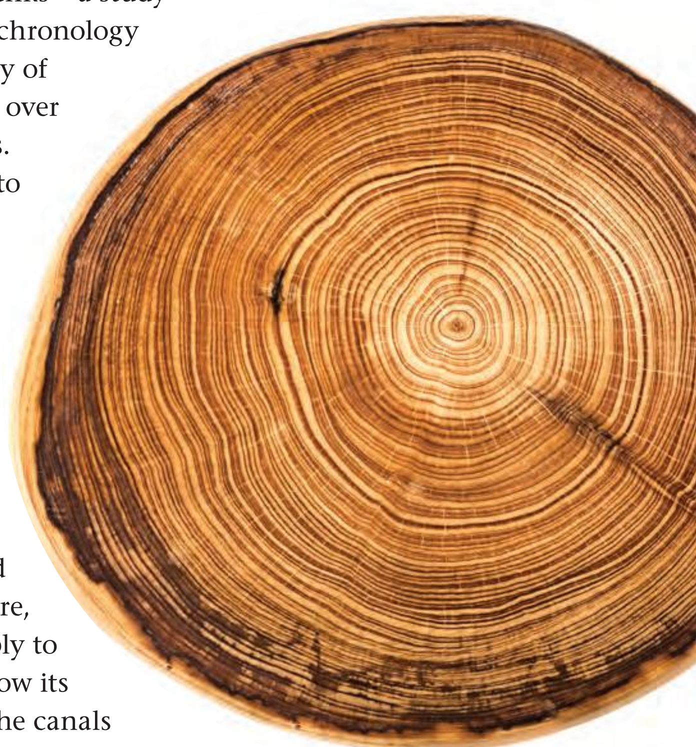
Changes in weather patterns

Recent advances in climate science have allowed researchers to gather and analyse weather data dating back thousands of years. Based on this research, many historians now believe that a period of unusually warm and stable weather from around 950 to 1250 CE helped the Khmer Empire to rise to the peak of its power. Scientists today refer to this time as the 'Medieval Warm Period'.

Scientists also point to weather in order to help explain the decline of the Khmer Empire. From around 1350 to 1850, their data shows a period of cold and unstable weather across Europe, now referred to as the 'Little Ice Age'. While South-East Asia is far from Europe, this cold weather is believed to have made the monsoon rains very unpredictable. Researchers have carried out studies on trees in the Angkor region, looking at the growth rings in tree trunks – a study known as dendrochronology. Dendrochronology provides information about the history of trees and what has happened to them over hundreds (or even thousands) of years. Each year, every tree adds a new ring to its trunk. In good years, when a tree receives plenty of water, the ring is thick; in bad years, when water is scarce, the ring is thin.

By studying trees in South-East Asia, scientists have determined that there were a number of lengthy periods of drought – the first from around 1360 to 1390 and the second from around 1415 to 1440. This would have greatly affected the Khmer Empire, which relied on a constant water supply to maintain its irrigation systems and grow its crops. If the water supply decreased, the canals would have dried up and been damaged. Although the empire had already lost control of much of its territories by this time, the extreme drought conditions would have left it weaker and more open to attacks.

Source 6 A Khmer sculpture



Source 7 By analysing the rings of trees in South-East Asia, scientists have identified two periods of serious drought that may have contributed to the fall of the Khmer Empire.

Source 8 An artist's impression of Ayutthaya war elephants going into battle

The effects of war

As the Khmer Empire became weaker, the Cham (who lived to the east of the empire) became a more and more serious threat. In 1177, the Cham successfully attacked the Khmer Empire, using the Mekong River and Tonle Sap Lake to launch a water-based invasion that resulted in Angkor being captured and plundered. Jayavarman VII was to spend a large part of his rule attacking and then finally driving off the invading Cham. By the 1190s, he had defeated them, but these constant battles left the empire exhausted and weak.

In addition to the Cham, the Khmer Empire also developed a new enemy to the north-west, known as the Ayutthayans. These people had previously been under Khmer control, but developed their own kingdom and began to challenge Khmer authority. They attacked the Khmer Empire in 1335 and 1353, capturing Angkor for a short period. It is thought that during these attacks they damaged the water management system in Angkor. They certainly carried off many Khmer as slaves, leaving fewer people to maintain the irrigation system and to plant and harvest the rice crops.

In 1431, the Ayutthayans attacked again – this time capturing and plundering Angkor, and repeatedly driving the Khmer away to the south-east. The conquering Ayutthayan king plundered the temples, removing statues of Buddha. As a result, many members of the royal court deserted cities such as Angkor Thom, and retreated to the old capitals on the Mekong River.

Source 9 This watercolour painting by Monro S. Orr (1874–1955), titled *The Black Death*, shows the global reach of the pandemic.

Spread of the Black Death

bubonic plague
an infectious disease caused by bacteria (called *Yersinia pestis*), which are carried by fleas on rats and mice; it often quickly kills those who contract it

Black Death
a deadly plague that spread across Asia, Europe and Africa during the fourteenth century

Although there is very little written evidence to support the theory, some historians believe that an outbreak of the **bubonic plague** – leading to the deadly pandemic known as the **Black Death** – may also have weakened the Khmer Empire.

The Black Death is believed to have first appeared in China around 1345, and some historians believe it may then have spread rapidly down through South-East Asia along trade routes.

If this was the case, then the Khmer Empire would most likely have been affected. As in other countries, the pandemic would have struck quickly, devastating the society by killing large groups of the population. Harvests and trade would have suffered.

Quiz me!
A quick quiz on external challenges for the Khmer Empire

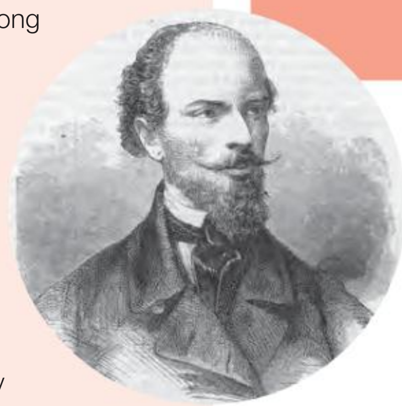
The rediscovery of Angkor

After about 1431, Angkor slowly lost influence and importance. Although the Angkor region was never completely abandoned, its large population declined greatly. Eventually, many of the temples and buildings became overrun by the surrounding forests (see Source 3 on page 13.43). It was not until 1860, when a French explorer called Henri Mouhot came across the ruins at Angkor while trekking through the region, that the outside world was introduced to the Khmer Empire. Mouhot recorded his observations, which were published shortly after his death in 1861.

The rediscovery of Angkor provided a wealth of historical evidence and raised a great deal of interest among historians. Today, a lot of work is being done to protect, preserve and restore the site, which was added to the UNESCO World Heritage List in 1993.

For more information on this key concept, refer to page 201 of 'The history toolkit'.

KEY CONCEPT
Evidence



Source 10 Henri Mouhot

13.13 CHECK YOUR LEARNING

Review and understand

1 **Define** 'dendrochronology'. How has it helped to identify one of the reasons why the Khmer Empire came to an end?

2 **Identify** two kingdoms that the Khmer Empire went to war with. Which of these kingdoms attacked Angkor in 1431, and what were the effects of this?

Apply and analyse

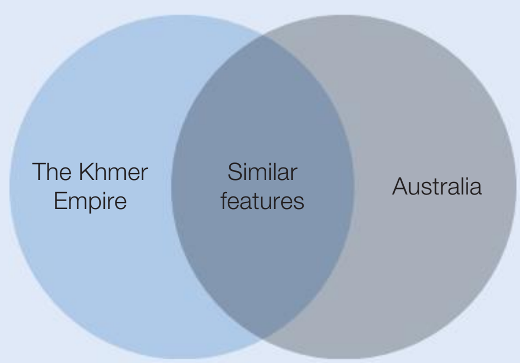
3 In your own words, **explain** the following terms:
   a Medieval Warm Period
   b Little Ice Age.

4 **Summarise** the effects these weather patterns had on the Khmer Empire.

Evaluate and create

5 List the six internal and external reasons put forward for the fall of the Khmer Empire (in this topic and topic 13.12) and rank each one from 1 to 6 according to the impact they had on the downfall of the empire. **Justify** (give reasons for) your ranking, and discuss your answers with your class to see if you all agree.

6 **Research** the effects of drought in the Khmer Empire. Compare this with the effects of drought in Australia. Create a Venn diagram like this one to explore the similarities and differences between these two societies.



13C RICH TASK

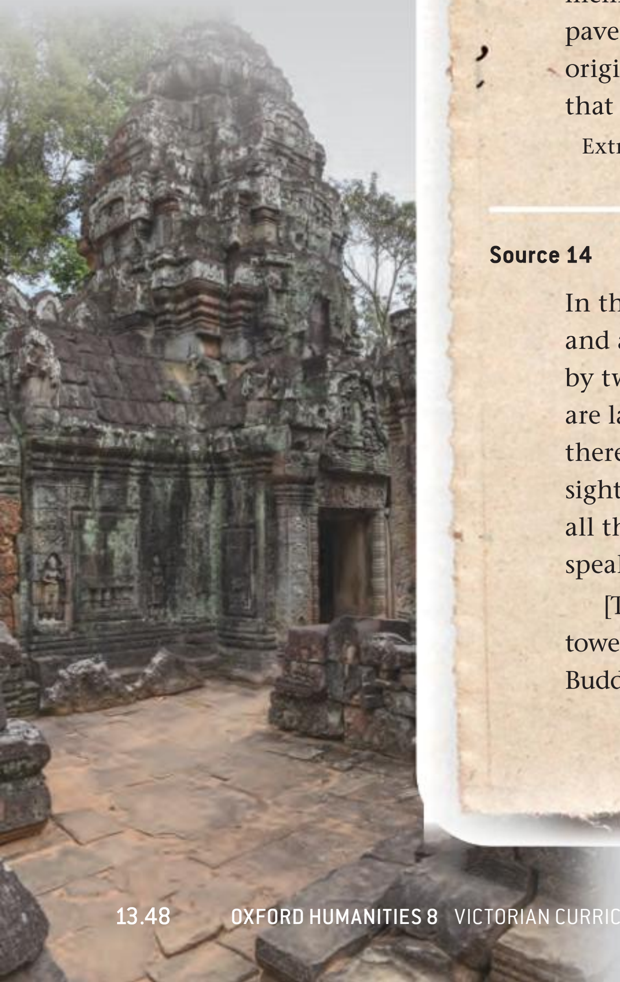
Conserving Khmer sites

In order to protect, preserve and restore ancient historical sites such as the temples and monuments across the Angkor region, historians and archaeologists need to conduct extensive research to understand what these sites used to look like, how they were constructed and how they may have been damaged over time.

The World Monuments Fund has been dedicated to preserving and restoring seven temples in the Angkor region since 1996. This work is time-consuming, labour-intensive and expensive. To restore one temple can cost $550 000. The World Monuments Fund has a campaign to 'adopt' a *garuda*, as it costs more than $20 000 to restore one of these statues. Sources 11 to 13 demonstrate the challenges and benefits of this work for Cambodia's cultural heritage; while Sources 14 and 15 give an idea of what the temples may have looked like during the empire.

Source 11 Ta Som Temple before conservation

Source 12 Ta Som Temple after conservation in 2012



Source 13

Addressing the structural issues [during restoration works at Phnom Bakheng Temple] required an intense, artfully engineered intervention … the sandstone wall blocks and pavers are being disassembled, along with the sanctuaries that sit atop them; laterite foundations underneath are then restored; a waterproof membrane is installed; and finally the pyramid walls are reassembled and the pavers reset on top. Whenever possible, original stones are replaced in their original positions, supplemented by stones found where they fell, or others that have been removed to the perimeters of the site over time.

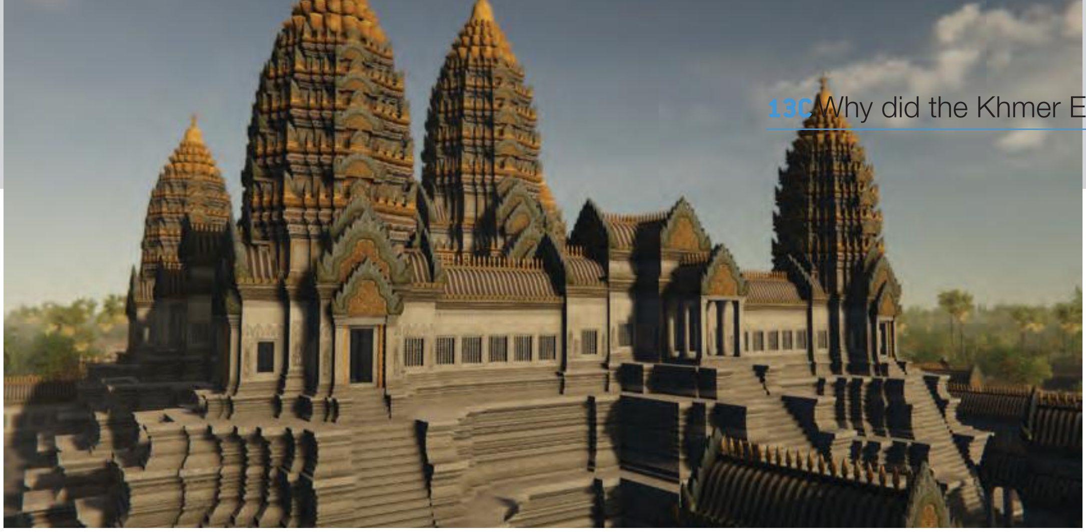
Extract from Joshua David, President of the World Monuments Fund, *My Journey through our Work at Angkor*, World Monuments Fund website

Source 14

In the center of the capital is a gold tower, flanked by twenty or so stone towers and a hundred or so stone chambers. To the east of it is a golden bridge flanked by two gold lions, one on the left and one on the right. Eight gold Buddhas are laid out in a row at the lowest stone chambers … [N]orth of the gold tower there is a bronze tower. It is even taller than the gold tower, and an exquisite sight. At the foot there are, again, several dozen stone chambers … I suppose all this explains why from the start there have been merchant seamen who speak glowingly about rich, noble Cambodia …

[T]o the north of the city lies the North Lake. In the middle of it is a gold tower, square in shape with several dozen stone chambers. A gold lion, a gold Buddha, a bronze elephant, a bronze cow, and a bronze horse – these are all there.

A description of Angkor Wat in Zhou Daguan, *A Record of Cambodia*, 1296



Source 15 *A Hypothetical Visualisation of Decorative Elements at Angkor Wat, 12th Century* by Tom Chandler, Chandara Ung, Brent McKee and Mike Yeates, Monash University, 2019

KEY SKILL
Communicating & reflecting

Developing a written historical argument

Presenting a series of historical arguments in writing is an important skill for all historians. It is particularly useful when convincing others of your point of view on a historical research question. You will need to present well-reasoned points, and support your argument with information from various sources.

When developing a written historical argument, follow these steps:

Step 1 Devise a research question or argument.

Step 2 Read and understand the information in the sources.

Step 3 Create a table, diagram or mind map to compare and contrast information in the sources. Work out which sources agree with each other and which do not.

Step 4 Find any information in the sources that supports or refutes your argument, and add this to your table.

Step 5 Using the TEEL paragraph structure (see page 219 of 'The history toolkit'), write your argument in one or more paragraphs, using the sources as evidence. You should explain why particular sources support your argument, and give reasons why the sources that do not support your argument are less important or not valid.

Step 6 Acknowledge your sources using referencing conventions.

For more information on this key skill, refer to page 218 of 'The history toolkit'.

Practise the skill

1 Examine Sources 11 to 15. Following the six steps listed in the key skill, prepare a written argument in response to this statement: 'Conservation projects are not worthwhile as they only bring limited end results for a huge outlay (amount) of time and money.' Discuss **to what extent** you agree with this statement. Refer to all the sources in your arguments, and perform extra research if required.

Extend your understanding

1 Conduct some further **research** to find out the reasons why UNESCO has classified temples in the Angkor region as World Heritage sites. Generally, they must fulfil some key criteria. Categorise the reasons given under the relevant 5Rs of historical significance (see page 212 of 'The history toolkit').

2 Conservation projects are expensive. Conduct further **research** to determine who is funding any current restoration projects and approximately how much money has been spent on them.

3 Study Source 13 to 15 answer the following questions:
   a **Describe** the work occurring at Phnom Bakheng Temple, using Source 13.
   b **Explain** why the work carried out at the Phnom Bakheng Temple could be described as a jigsaw puzzle.
   c **Discuss** whether you think the Phnom Bakheng Temple could be restored to look like what is outlined in Sources 13 and 14.

13 CHAPTER REVIEW

Review questions

13A How did the Khmer Empire rise to power?

1. **Outline** one major development introduced by Jayavarman II. (1 mark)
2. **Summarise** the symbolism and purpose of Khmer temples. (3 marks)
3. **Discuss** whether trade or warfare was more significant to increasing the power of the Khmer Empire. Provide examples to support your answer. (6 marks)

(Total: 10 marks)

13B How was society organised during the Khmer Empire?

1. **Define** the term 'animism'. **Outline** two other religions that were important during the Khmer Empire. (3 marks)
2. **Summarise** the role of women within Khmer society. Be aware of your own perspective when writing your description. (3 marks)
3. **Compare** the daily challenges of village life for the Khmer people to the daily challenges faced by the Khmer kings. (4 marks)

(Total: 10 marks)

13C Why did the Khmer Empire come to an end?

1. **Identify** which ruler's death resulted in the Khmer Empire entering a period of slow decline. (1 mark)
2. **Summarise** how the Ayutthayans may have contributed to the decline of the Khmer Empire. (3 marks)
3. **Discuss** the following statement: 'Religion was the most significant influence on the Khmer king, yet it was ultimately their greatest undoing.' Provide an argument for and against this statement, and conclude with your overall opinion. (6 marks)

(Total: 10 marks)

Review activity

Read Source 16 and answer the questions that follow.

The king's procession

Source 16

When the king leaves his palace, the procession is headed by the soldiery; then come the flags, the banners, the music. Girls of the palace, three or five hundred in number, gaily dressed, with flowers in their hair and candles in their hands … Then came other girls carrying gold and silver vessels from the palace and a whole galaxy of ornaments, of very special design, the uses of which were strange to me. Then came still more girls, the bodyguard of the palace, holding shields and lances … Following them came chariots drawn by goats and horses, all adorned with gold, ministers and princes, mounted on elephants, were preceded by bearers of scarlet parasols, without number. Close behind came the royal wives and concubines, in palanquins and chariots, or mounted on horses or elephants, to whom were assigned at least a hundred parasols mottled with gold. Finally the sovereign [king] appeared, standing erect on an elephant and holding in his hand the sacred sword. This elephant, his tusks sheathed in gold, was accompanied by bearers of twenty white parasols with golden shafts. All around was a bodyguard of elephants, drawn close together, and still more soldiers for complete protection, marching in close order …

For the most part, [the king's] objective was a little golden pagoda in front of which stood a golden statue of the Buddha. Those who caught a glimpse of the king were expected to kneel and touch the earth with their brows. Failing to perform this obeisance [respect], which is called sun-pa [sambah], they were seized by the masters of ceremonies [marshals] who under no circumstance let them escape.

Extract from Zhou Daguan, *A Record of Cambodia*, 1296

1. Choose one word to summarise your impression of the Khmer king's procession and explain why you chose it. (1 mark)
2. Is Source 16 a primary or a secondary source? **Outline** why. (2 marks)
3. Using Source 16, **explain** how the majesty and significance of the King's position are demonstrated to the Khmer people. (3 marks)
4. **Analyse** this source using the 'DAMMIT U' structure (see page 216 of 'The history toolkit'). In your response, provide examples from the source and from what you have learnt about the Khmer Empire. (8 marks)
5. **Discuss** how useful this source is in understanding the life of a Khmer king. Do you think it is accurate? What other evidence could help you understand more about the king's leadership? Provide examples to support your opinion. (6 marks)

(Total: 20 marks)

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Chapter review quiz
Chapter 13

CHAPTER 14

Mongol expansion

The Mongol Empire began as small tribes of nomadic animal herders on the vast grasslands of northern Asia. Around 1206 CE, a number of these tribal groups united to form a great army that began to invade and conquer neighbouring lands. The Mongol Empire only lasted for about 150 years, but it became one of the largest and most powerful empires the world has ever known.

Although they were feared as violent and merciless warriors, the Mongols also made many positive contributions. They allowed religious freedom across their empire and introduced many inspired policies and laws. They were also responsible for establishing vital trading routes between the East and West.

Source 1 A sand statue of Mongol Emperor Genghis Khan in the Badain Jaran Desert, inner Mongolia, China

14A
How was Mongol society organised?

14B
Why did the Mongols expand their territory?

14C
What were the consequences of Mongol expansion?

14.1 Mongol expansion: a timeline

An artist's impression of Temujin (Genghis Khan)

1150 CE — 1200 — 1250

1185
Temujin (later known as Genghis Khan) becomes leader of his Mongol tribe at the age of 18.

1206
Genghis Khan unites all Mongol and Tatar tribes, marking the beginning of the Mongol Empire.

1215
Mongol forces invade and conquer Beijing.

1218
Northern China is conquered and the Mongols spread towards Turkestan, Persia and Russia.

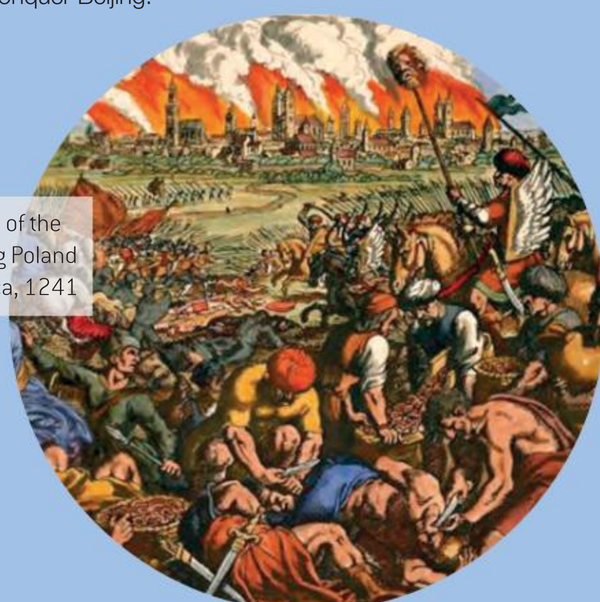
1227
Genghis Khan dies.

1229
Ogodei, Genghis Khan's third son, becomes Great Khan.

1235
Karakorum is established as the capital city of the Mongol Empire.

1241
Mongol forces invade Poland (Battle of Legnica) and Hungary (Battle of Mohi). In the same year, the Great Khan Ogodei dies.

1251
Mongke Khan becomes Great Khan.



An artist's impression of the Mongol army invading Poland at the Battle of Legnica, 1241

Sequence this!
Key events in Mongol expansion

Source 1 A timeline of some key events and developments in Mongol expansion

An artist's impression of Marco Polo at the court of Kublai Khan

A Japanese illustration showing samurai defending Japan against Mongolian invaders

1264
Kublai Khan's rule begins.

1271
Kublai Khan establishes the Yuan Dynasty, claiming the title Great Khan and Emperor of China.

1274
An attempted Mongol invasion of Japan fails because of a typhoon.

1276
The merchant traveller Marco Polo arrives in Dadu, the capital of the Yuan Dynasty (now Beijing).

1281
A second attempted invasion of Japan fails.

1294
Kublai Khan dies. The Mongol Empire begins to break apart.

1300 | 1350 | 1400 CE

1353
There is an outbreak of disease in China (probably bubonic plague), killing huge numbers of people. Mongol control over China is weakened.

1368
The Mongols are driven out of Beijing, marking an end to the Yuan Dynasty and the Mongol Empire.

14.1 CHECK YOUR LEARNING

Review and understand

1 **Identify** the year Temujin became leader of his tribe.

2 **Identify** when the Mongols conquered Beijing.

Apply and analyse

3 Using the timeline, **calculate** which khan ruled for a longer period – Genghis Khan or Kublai Khan?

Evaluate and create

4 **Research** some other significant Mongol invasions and conquests of European countries. Create a timeline using these dates.

5 On a blank map, colour all the modern-day countries listed on this timeline that the Mongol Empire attacked. What does this tell you about the strength of the empire?

Document
Asia: Blank map

14.2 Traditional Mongol culture and society

In this topic, you will:

- » explore the daily life and culture of early Mongol society
- » understand how the physical environment influenced a nomadic lifestyle.

The Mongol Empire had humble beginnings on the vast grasslands and plains of northern Asia. These grasslands are part of a region known today as the Eurasian **Steppe**. The steppe is known for its severe climate and extreme temperatures. In the spring there is plenty of food for horses and sheep, but spring is short. In summer, the sun beats down and temperatures can reach 40°C, turning the grass to straw. In winter, the ground is covered with a thick blanket of snow, and raging winds sweep across the plains, pushing temperatures as low as –40°C. Short, hot summers and long, cold winters made life hard for the Mongols and had a major influence on the way in which their society evolved and was organised.

steppe
a large stretch of grassland (without trees), typically found in places such as Siberia and Mongolia

clans
groups of people linked and united in their aims and behaviours by the knowledge (or a belief) that they share common ancestors

nomadic
a society of people who do not live in a set place but move around, usually in search of food and shelter, and good pasture for their animals

yurts
Mongolian circular tents, with wooden frames and felt walls

The nomadic way of life

The Mongols lived in tribal groups, and each tribe was led by a chief. The tribe was divided into **clans** along family lines, and each clan had its own leader. The clans lived as independent groups but would occasionally join together for security in the event of an outside threat.

Because of the harsh environment in which they lived, the Mongols were **nomadic**. They were an adaptable and versatile people who moved in their tribes from one location to another across a wide region, taking their homes and families with them. They responded to the seasons – taking their animals (such as sheep and horses) to the plains to graze in the summer months, and then into the valleys to take shelter during the bitter winter months. They tamed and rode the wild horses native to the region, hunted wild game, and traded with more settled societies in the south for foods and materials they could not source themselves (such as grain, and metals for their weapons).

Shelter and transportation

The Mongols lived in large, portable, circular tents called **yurts**. A yurt consisted of a circular wooden frame covered in felt made from sheep's wool. The felt coverings were often colourfully decorated. Yurts were designed so that they could be easily transported and reassembled (see Source 4) – an important feature for nomads.

Source 2 Traditional yurts on the Eurasian Steppe

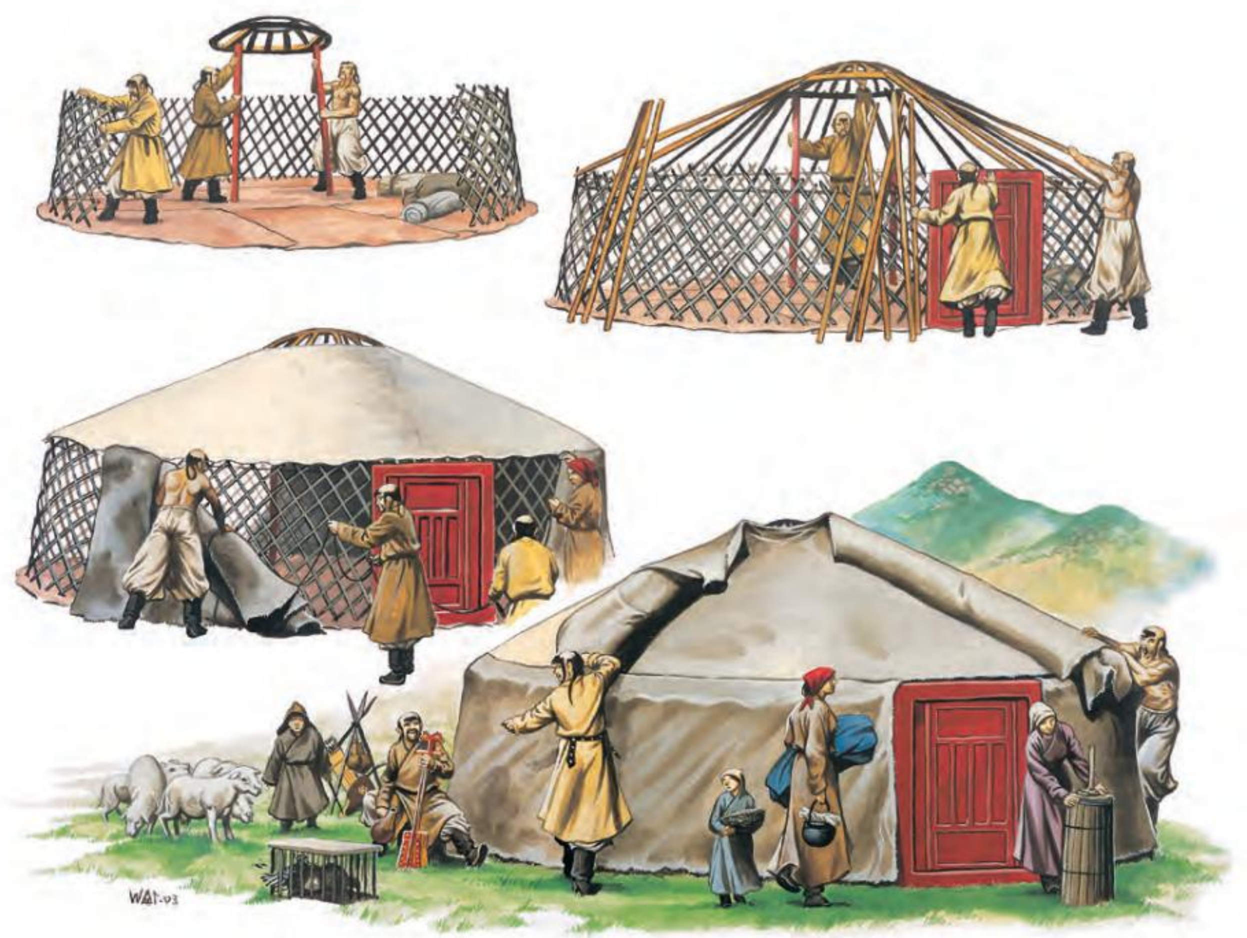
Inside each yurt, carpets covered the floor. A hole (which could be covered over in bad weather) was left at the top to let smoke escape from the fires used for cooking and heating.

The animals they kept provided for most of the Mongols' needs. Horses were used for transport and enabled the Mongols to hunt. Female horses also provided milk. Milk was the Mongols' main source of nutrition, and from it they also made yoghurt and cheese. Sheep provided skin and wool for clothing; bones for arrowheads; wool to make felt for yurts; meat, milk and cheese; and dung to burn for cooking and heating. Less important, but still essential to life and trade on the steppe, were camels and oxen. These were transport animals used to pull carts full of goods as the Mongols travelled across the vast areas of the steppe.

MONGOL HOMELANDS

Source: Oxford University Press

Source 3 The Mongol homelands, showing the position of Karakorum – the Mongol capital between 1235 and 1260 – and modern-day country borders



Source 4 The construction of a yurt at a new campsite; illustration by Wayne Reynolds

deels
pieces of traditional Mongolian clothing, usually made of cotton, wool or silk

Source 5 A Mongolian herder wearing a *deel*

Food

The traditional Mongol diet consisted of 'white' and 'brown' foods – essentially, dairy products and meat products. Cheeses and yoghurts were an important staple in Mongol diets during summer months, when meat was rarely eaten. In the winter, however, meat was the main food. Sheep from their herds, as well as some wild game animals, such as birds and rabbits, provided the bulk of the Mongols' meat intake.

Horses provided milk for a fermented (and mildly alcoholic) drink called *kumis*. *Kumis* was produced by churning the milk inside a bag made of animal skin. The churning process involved moving the bag regularly. This could be accomplished by hanging it on the saddle of a horse or near the entrance of a yurt, so that every person who entered would churn the mixture as they passed through.

Clothing

Everyday clothing for both men and women were long robes called ***deels***. For most Mongols, these were long woollen coats that were buttoned on the side and belted around the middle. Wealthy members of Mongol society might have colourful *deels* made of brocade (a very delicate and decorative woven fabric) or silk with fur trims. Clothing had to be warm, but also layered so that some could be removed when the temperatures soared. Furthermore, it had to be unrestrictive to enable frequent horse-riding. Men wore trousers under their *deels*, and women wore either trousers or skirts. Both men and women wore leather boots.

KEY CONCEPT
Significance

The symbolism of clothing

Living as nomads restricted the number of possessions Mongols could have. Therefore, clothing was an important family asset – often given as gifts or as part of a bride's dowry. Men often exchanged their leather belts, and khans (leaders) would give extravagant *deels* to the senior members of their court. During ceremonies and before prayers, Mongols removed all belts and hats to demonstrate their obedience to religion.

Clothing was also a symbol of wealth and power, as it showed how skilled a person was at hunting, or the amount of livestock they owned. This is because the materials used to make clothing came from animals – felt was made from the wool of sheep, while goats were herded as the main source of leather. Hunting foxes, monkeys, rabbits, squirrels and wolves provided furs, with the fur of snow leopards and lynx reserved for the elite. Silk was also available through trade with China.

Despite the significance of clothing in Mongolian culture, Mongols were often considered 'dirty' by foreigners. Mongols would wipe their hands on their clothes after eating and animal fat was used to help keep clothes windproof and waterproof. Their nomadic life and the weather meant that they did not wash their clothes often.

Headwear was also important to the Mongols. There are over 400 different shapes of traditional Mongolian headwear, which are both functional and decorative. The diversity in headwear was significant in distinguishing members of society as young or old, male or female, and married or single, as well as distinguishing the season or special events.

For example, the *boqta* was a type of tall headwear worn by women. It was significant as it helped to differentiate men and women from a distance, as there was no distinct difference in their clothing. The Venetian explorer Marco Polo is believed to have returned to Europe by 1269 with a *boqta* after travelling to Mongolia. It is possible that the shape of the *boqta* inspired the tall, cone-shaped headdress that became popular with medieval women in Europe, which was called a hennin.

For more information on this key concept, refer to page 201 of 'The history toolkit'.

Source 6 Mongolian women wearing *boqta* (left) and women in medieval Europe wearing hennins (right)

Religion

Source 7 A Mongolian shaman performing a traditional shamanistic ritual, with smoke and a drum

The religious beliefs and practices of the Mongols were based on a system known as shamanism. The practice of shamanism involves interaction between the spirit world and a shaman – a holy person with special powers to communicate with and interpret the spirits. Spirits included not only 'human' entities, such as ancestors, but also the natural world of animals and the environment. The shaman's role was to speak with the spirits on behalf of people, bless the herds and young children, and predict the future.

Shamans, who could be male or female, also provided medical care. Because of their knowledge of the natural world, they were able to create medicines from local plants. That practical knowledge, combined with their spiritual gifts, gave shamans an important role and a certain amount of power in Mongol society.

The Mongol people were not limited to shamanism in their spiritual beliefs. They were also willing to embrace other religious teachings and traditions they encountered as their empire expanded. Some adopted Islam from Persia, while others adopted Buddhism from Tibet. Some Mongol tribes even followed an early branch of eastern Christianity, called Nestorianism.

Quiz me!
A quick quiz on traditional Mongol culture and society

14.2 CHECK YOUR LEARNING

Review and understand

1 **Define** the word 'nomadic'.
2 **Describe** the role of a shaman.

Apply and analyse

3 **Summarise** how the climate influenced the Mongol way of life.
4 **Examine** Source 5. Why do you think traditional Mongolian clothing has the design that it does?

Evaluate and create

5 **Research** traditional Mongolian clothing. Create a sketch of the headwear, clothing and boots you would wear for this season of the year.

Think, pair, share

- Think about the different uses of animals in traditional Mongol society. Which animals do you think were most important to daily life? Is it possible to rank them?
- Discuss your ideas with a partner.
- Share your thoughts with the class.

14.3 Social roles in Mongol society

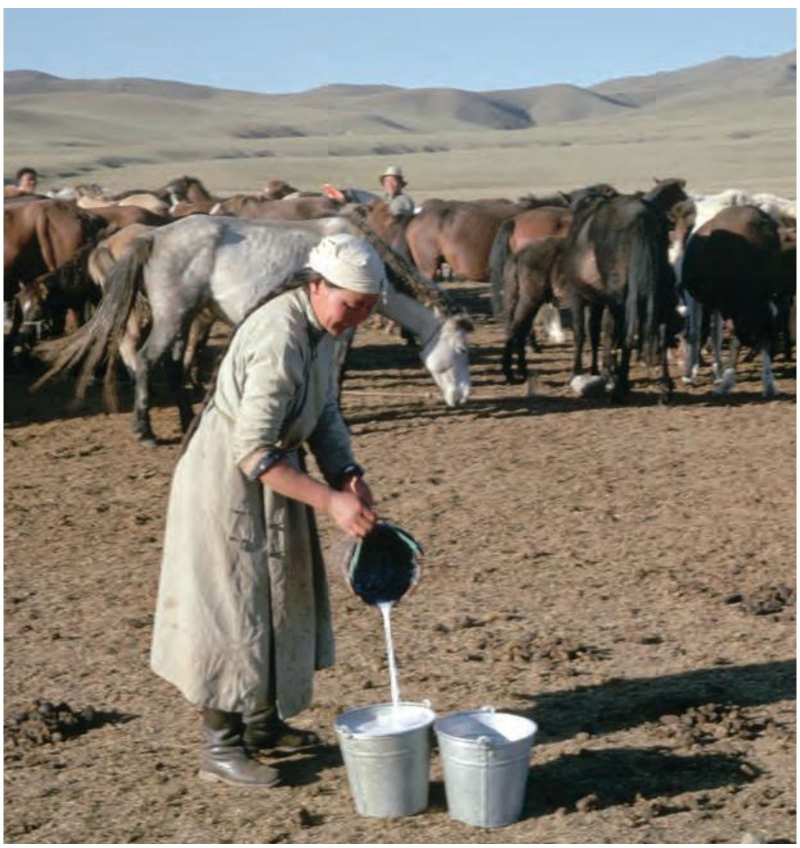
In this topic, you will:

- investigate the social organisation of early Mongol society
- understand the roles and perspectives held towards Mongol women

khans
the title given to leaders of Mongolian communities (and, during the thirteenth century, to the head of the Mongol Empire)

Like many tribal nomadic societies, early Mongol society was clan-based. Within each clan, there was a head man who led the group and was responsible for it. Before the unification of the Mongols under Genghis Khan (formerly known as Temujin), there was no single great leader. As a result, wars between clans were common. Tribal warfare was therefore a part of life for Mongol men. They were skilled horsemen and fighters – skills that would help the Mongols to become a great power in their time. As the Mongol Empire grew and unified, senior leadership in the form of **khans** emerged.

Each Mongol man was the head of his own family, which could consist of several wives and many children. Because men spent a great deal of their time fighting wars between the clans, women were responsible for day-to-day outdoor work. This included the management of livestock, milking the animals, the making of felt for yurts, and breaking down and rebuilding the yurts whenever a move to a new territory was necessary. Women were also responsible for household chores, such as cooking and sewing.



Source 8 A Mongolian woman pouring horse's milk into buckets for fermenting

Although men were regarded as the natural leaders in Mongol society, Mongol women held a strong social position as well. Women were seen to possess wisdom, so it was common for men to have older wives to advise and guide them. It was considered 'unmanly' if a husband did not listen to his wife. It was not uncommon for women to receive military training, and at times to fight beside the men in battle. Mongol women could also be shamans. This meant that they too could have great influence in their clans.

Genghis Khan – the founder and first Great Khan of the Mongol Empire – is said to have listened carefully to his wife, Yesui. When she advised him to choose a successor in case he was injured or killed in battle, he is reported to have said: 'Even though she is only a woman, what Yesui says is quite right.' His mother also had great influence over him. His career and leadership were inspired by her.

Strengths and abilities of Mongol women

At times, women in the Mongol Empire exercised great political power and strength. Evidence shows that they not only took part in hunting and heavy labour, but also assumed leadership roles – usually because a male leader was absent or unavailable.

From 1227 until 1260, when Ogodei was Great Khan, his wife Toregene gradually assumed power. This was necessary because Ogodei Khan is rumoured to have spent much of his time drunk. On Ogodei Khan's death, Toregene became regent, meaning she ruled in place of their son, Guyuk, because he was too young to assume power. She appointed her own ministers, including a woman called Fatima who was her close confidante.

Other powerful women who ruled Mongolia included Sorghaghtani, the widow of Genghis Khan's son Tolui, who ruled northern China and eastern Mongolia; and Ebuskun, the widow of Genghis Khan's son Chaghatai, who ruled Turkestan. Both these women were Mongol only by marriage.

For more information on this key concept, refer to page 201 of 'The history toolkit'.

Source 9

> [Genghis Khan] ordered women accompanying the troops to do the work and perform the duties of the men, while the latter were absent fighting.

Extract from *The Mongols and Russia* by Russian historian George Vernadsky, 1953

KEY CONCEPT
Evidence

Quiz me!
A quick quiz on social roles in Mongol society

Source 10

> [Mongol girls] and women ride and gallop as skilfully 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 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.

A description of Mongol women's skills by Giovanni di Plano Carpini (1182–1252), a European who lived for a time at the court of Great Khan Ogodei, in *The Story of the Mongols Whom We Call the Tartars*, 1245

Source 11 Female archers from Mongolia taking part in a traditional games festival called Naadam, which involves wrestling, horse racing and archery; Mongolian women participate in all contests except for wrestling.

14.3 CHECK YOUR LEARNING

Review and understand

1 **Describe** the main roles of men in Mongol society.

Apply and analyse

2 **Explain** which roles and daily jobs performed by women were most influential in Mongol society.

3 It was considered 'unmanly' for Mongol men to ignore the advice of their wives. Why was this the case?

4 **Analyse** Source 10. Use the 'DAMMIT U' acronym (see page 14.35) to structure your response.

Evaluate and create

5 In pairs or small groups, **discuss** how continuity and change applies to gender roles in traditional Mongol society and in modern-day society. Use your discussion points to fill in a table like this one.

Continuity in roles of men and women	Changes in roles of men and women

See page 200 of 'The history toolkit' for more information on continuity and change.

14.4 Significant individual: Temujin (Genghis Khan)

In this topic, you will:

» examine the rise and achievements of Genghis Khan.

Genghis Khan is regarded as the first great leader, or Great Khan, of the Mongol Empire. Given the name Temujin at the time of his birth around 1162, he was the eldest of five sons. His father, Yesugei, was a minor Mongol clan leader who was poisoned by a neighbouring **Tatar** tribe when Temujin was only nine years old. The Tatars were a rival ethnic group who also lived on the steppe. Despite his young age, Temujin took up his father's position as clan leader because he was the eldest son. The other members of the clan did not want such a young leader so they deserted Temujin, leaving him alone with his mother, Ho'elun, and younger siblings. For protection, the family was forced to move to the upper reaches of a river between the plain and the steppe, where they survived on berries and roots, as well as small wild animals.

Tatar
a member of an ethnic group whose members can be found today in countries such as Turkey, Uzbekistan, Kazakhstan, Ukraine and Azerbaijan

As Temujin grew to become a teenager, other Mongol clans feared his potential. One Mongol clan decided to capture him. Temujin was placed in a cage with a large wooden collar around his neck. He was unable to feed himself, as his hands were tied. One of the clan members took pity on him, and eventually helped Temujin escape by removing the wooden collar and giving him a horse so that he could return to his family.

Sequence this!
Events in Temujin's life

Temujin becomes the khan

Temujin believed that he had survived his misfortunes because he was destined for greatness. Influential shamans supported him. A shaman named Kokuchu, the son of Yesugei's old servant, claimed that he had ascended into heaven in a trance and had been given the message that Temujin and his sons would one day rule the whole world.

Source 12 An artist's impression of Genghis Khan

In 1185, when Temujin was about 18, he was chosen as the khan of his tribe. He immediately began to organise and train an army, making them into a strong fighting force.

He also created alliances with other clans and tribal groups to increase his power. One such group was known as the Kerait. Their khan, Toghrul, had been a **blood brother** of Temujin's father, Yesugei, and was happy to support Temujin. Together, they launched attacks on groups of Tatars. Temujin's attacks on the Tatars were also helped by a change in the attitude held by the Jin **Dynasty** – a powerful Manchurian tribe that had conquered northern China a century before. The Jin had been allies with the Tatars in the past, but now feared their growing strength. As a result, in 1196 the Jin formed an alliance with Temujin and Toghrul to defeat the Tatars.

blood brother
two or more men not related by birth who have sworn loyalty to each other; the Mongols used the term *anda*

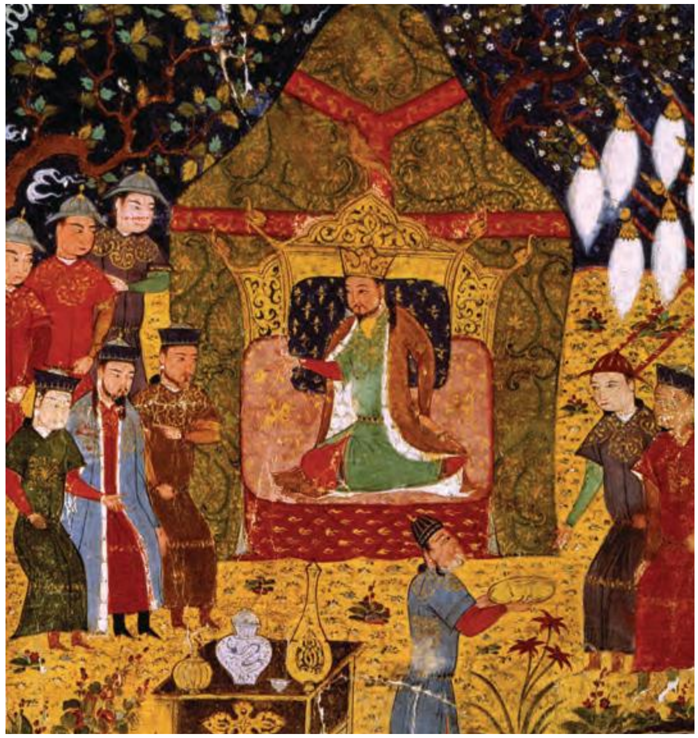
dynasty
a period of rule by successive members of one extended family

Defeat of the Tatars

In 1202, Temujin's well-trained and disciplined army defeated the Tatars, even though his forces were outnumbered. They killed and captured thousands. The days that followed were bloody and brutal. Tatar women and young boys were taken into slavery, and any Tatar boy who stood taller than a wagon axle was put to death.

The rise of Genghis Khan

In the summer of 1204, Temujin entered into a battle with the Naiman tribe (one of the 13 remaining tribes who resisted forming an alliance with him). At the battle of Chakirma'ut, Temujin's forces were once more heavily outnumbered, but again the superior organisation of his army brought him success. A childhood friend and blood brother of Temujin, called Jamuka, fought against him at the battle. Jamuka escaped from the battlefield with a few followers and hid in the mountains. A year later he was betrayed by a supporter and executed by Temujin.



Source 13 A painting of Genghis Khan ascending the throne in 1206 near the Onan River region with his sons to the left, *c.* fourteenth century

Temujin also fell out with Toghrul, his father's old blood brother, who felt threatened by Temujin's rise. When Temujin attacked his camp, the older man fled. The way now lay open for Temujin to assume control of all the Mongol tribes.

When he was about 40 years old, Temujin became the undisputed leader of Central Asia. In 1206, a tribal council was summoned and tens of thousands of Mongols attended. They selected Temujin as their khan. As part of this ceremony, the Mongols gave Temujin a new title – Genghis Khan, meaning 'ruler of the world'.

With this, the Mongol Empire was born. Genghis Khan was now the ruler of about 1 million people in an area roughly the size of Western Europe. Not content with this, however, he soon began the real expansion of his empire.

I used to think, now I think

Reflect on your learning about the life of Genghis Khan and complete the following sentences.
- I used to think ...
- Now I think ...

What has changed in your understanding?

14.4 CHECK YOUR LEARNING

Review and understand

1 Who was Temujin? **Identify** the name by which he is more commonly known today.

2 **Identify** the year in which Temujin was born.

Apply and analyse

3 **Explain** why the Jin Dynasty stopped supporting the Tatars and began to support Temujin instead.

4 **Analyse** Source 13 by answering the following:
   a Which features in the source align with the traditional Mongol lifestyle?
   b Which techniques and features has the artist used to show the importance of Genghis Khan and his crowning ceremony?

Evaluate and create

5 Using the life of Genghis Khan as a model, **discuss** the following questions in small groups.
   a What qualities does a person need to become a powerful leader in a society?
   b What conditions within a society allow one person to become powerful enough to take control of it?

14.5 The Mongol army

In this topic, you will:

- » identify the unique features of the Mongol army that increased the Mongolian Empire's power
- » examine how Genghis Khan organised the Mongol army.

For the Mongols, herding, hunting, foraging and migrating were vital skills they used during times of both peace and war. As such, their nomadic lifestyle prepared all members of Mongol society for conflict. The Mongols did not have a separate word to define a soldier, as they did not differentiate between civilians and soldiers. The army was considered the society, and collectively they all maintained an aggressive warrior culture (see Source 14).

Source 14

> It is an army after the fashion of a peasantry … it is also a peasantry in the guise of an army, all of them, great and small, noble and base, in time of battle becoming swordsmen, archers, lancers and advancing in whatever manner the occasion requires.
>
> Extract from Persian historian Ata-Malik Juvaini, *The History of the World Conqueror*, *c.* thirteenth century

Under Genghis Khan's leadership, the Mongol Empire expanded rapidly, eventually growing to cover an area larger than that of the Roman Empire, centuries earlier. In order to survive and thrive, the empire needed organisation and stability – in other words, the traditional nomadic lifestyle of the Mongols would need to change. To achieve this, Genghis Khan immediately introduced a series of new measures, many of which centred on the organisation of the Mongol army.

plunder
to steal, often using violent force

Organising the Mongol army

The Mongols had traditionally always been warriors, and Genghis Khan chose to use this to his advantage. He was determined to break the old tribal loyalties. He did this by emphasising each soldier's loyalty to his military unit. Beyond that, loyalty was to the house of the khan himself. To enforce this, he set about organising Mongol warriors from different tribes into one unified fighting group, based on the decimal system.

The decimal system meant that all Mongol warriors were organised into groups by multiples of 10:

- The whole army was made up of large fighting units known as *tumen* (which each had 10 000 members).
- Each *tumen* was then broken into *minghan* (which each had 1000 members).
- Each *minghan* was then broken into *zuut* (which each had 100 members).
- Finally, each *zuut* was broken into *arav* (which each had 10 members).

Alongside each *tumen* of soldiers was possibly another 30 000 assistants, including suppliers, merchants, servants and campers. Furthermore, 600 000 animals ensured a stable food supply for the entire *tumen*. Towards the end of Genghis Khan's rule, the Mongol army was believed to have around 125 000 soldiers. They did not receive payment, but instead had to pay their commanders a charge known as a *qubchur*. This payment was usually based on what they could **plunder** during their conquests.

Without a fixed income, soldiers could collect a booty of fortunes and keep most for themselves, making the *qubchur* a preferred method of payment (see Source 15).

In addition to organising the army in this way, Genghis Khan created an imperial guard known as the *keshig*. At first, this was made up of his original and most faithful supporters. By 1206, however, the imperial guard was 10 000 strong. Recruits came from all tribes, and membership was regarded as a supreme honour. The imperial guard also provided Genghis Khan with people he could trust to organise and administer his empire. Later, members of the *keshig* became the basis of the Mongol Empire's ruling class.

Source 15

When swiftly pursuing many foes,
If you get booty [valuable stolen goods],
What you get you shall take away.
When in a battue [hunt],
You slaughter wild beasts,
What you slaughter you shall take away.

Quote from Genghis Khan, in *The Secret History of the Mongols*, *c.* thirteenth century, translated by Igor de Rachewiltz

Mongol weapons and fighting tactics

Analyse this! Quote from Genghis Khan

Each group within the Mongol army had specific tasks and functions that they were responsible for in battle, such as carrying messages or scouting enemy movements. Regardless of which group they belonged to, all Mongol warriors were trained to ride and fight on horseback. Genghis Khan divided these horsemen into light and heavy cavalry.

The light cavalry consisted mainly of archers. Each archer carried two bows and two quivers (containers) of arrows. Mongol archers could string and fire their arrows while riding at full gallop – timing their release so precisely that the jolt of galloping hooves did not affect their aim. Each man in the light cavalry also carried two or three javelins.

Source 16 A scene from the 2007 film *Mongol: The Rise of Genghis Khan*, showing the Mongol cavalry (soldiers mounted on horseback)

The heavy cavalry consisted of soldiers carrying battleaxes or hooked lances. Many members of the heavy cavalry also carried a sword and a wooden shield covered in leather. Some also carried lassos.

In battle, the light cavalry galloped back and forth in front of the enemy, showering them with arrows. After this, the light cavalry withdrew, leaving the heavy cavalry to charge. A favourite tactic of the Mongol army was to attack, then pretend to retreat. This would draw the enemy forward into a line of waiting archers.

As well as the cavalry, the Mongol army also had soldiers who would fight on foot. Often, these soldiers were recruited from areas the Mongols conquered, such as China. They were assigned to a Mongol soldier on horseback and would move across the battlefield ensuring any wounded enemy soldiers were killed. Even in victory, the Mongol army often slaughtered entire cities full of civilians and enemy troops. During the rule of the Mongol Empire, it is estimated that between 80 and 150 million people were killed in wars.

Source 17

> They have such a number of horses and mares that I do not believe there are so many in the rest of the world … the horse the [Mongols] ride on one day they do not mount again for the next three or four days, consequently they do not mind if they tire them out seeing they have such a great number of such animals.
>
> John of Plano Carpini, a European traveller to the Mongol court in the thirteenth century

Horsemanship and horses

Mongol horsemen were renowned for their riding skills. So central to their lives was horse-riding that children began riding at three or four years of age (and still do so today).

Mongol horsemen wore baggy trousers, long coats (fur-lined in winter), high leather boots, and caps with thick fur brims. Every horseman carried a large waterproof saddlebag,

Source 18 Herding Mongolian horses on the Eurasian Steppe

which could be inflated and used as a flotation device for crossing rivers (similar to a modern-day life jacket).

Mongol horsemen used much shorter stirrups than European horsemen at the time (similar to those used by professional jockeys today). This helped them to balance better on a galloping horse, and to stand in the saddle to shoot their arrows.

The breed of horses used by the Mongols are known as *takhi*. Over the course of centuries, *takhi* horses were bred to be tough enough to withstand the harsh environmental conditions of Central Asia, with its long, cold winters and short, hot summers. The lives of these horses were made much more difficult by the Mongols – they were a vital part of battles and were often pushed to their limits, being ridden huge distances each day. A rider and his horse could cover about 130 kilometres per day.

While Mongols were known for moving at rapid speeds, they had to be organised to ensure their horses were not exhausted before reaching the battlefield. Therefore, they would plan multiple strategic locations, routes and arrival times for various troops, ensuring they could maintain their strength for the impending fight.

Horses also played an important role in the diet of the Mongols and sometimes, when riding long distances without food, Mongol warriors would make a small cut on the vein in the neck of their horse and drink the vitamin-rich blood. Despite this, horses were never killed for their meat. Those that outlived their usefulness were often put out to pasture to spend the rest of their days grazing.

Source 19 A man falls from a fast-moving horse while playing a traditional nomadic game, in Gurvanbulag, Mongolia.

Source 20 An artist's impression of the Mongol Army on horseback, *c.* fourteenth century

KEY SKILL Analysing sources

Interpreting sources

Historical sources always reflect the perspective of their creator. It is therefore important to consider a range of evidence when trying to interpret the accuracy and reliability of a source. Whether is it a visual or written source, there are key features that help us to understand the tone, values and point of view portrayed.

Source 21 is written by a Persian poet, Amir Khusrow, who lost his father and was held captive during a Mongol invasion in the thirteenth century. His opinion differs greatly from that of the creator of the painting in Source 23, which depicts some Mongol warriors.

When interpreting sources, it is important to ask questions about who created the source and why. Think about the context (situation) of when the source was produced, the opinions (point of view) expressed in the source and what messages are inferred (suggested) by the source.

Read Source 21 carefully. The annotations provide guidance on how to interpret a source.

For more information on this key skill, refer to page 213 of 'The history toolkit'.

Practise the skill

1 **Examine** Source 23. Look for the opinion and inference given by the creator.

2 **Distinguish between** the opinions about Mongol warriors in Sources 21 and 23. How are the opinions expressed and the inferences suggested different?

Source 21 Extract from Persian poet Amir Khusrow, thirteenth century

Opinion: Vivid descriptions, exaggerations and comparisons show the strong opinion of the author.

Their [Mongol] chests, in color half-black, half-white, were covered with lice which looked like sesame growing on a bad soil. Their bodies, indeed, were covered with these insects, and their skins were as rough-grained as shagreen [rough, untanned leather], fit only to be converted into shoes.

Inference: By relating the Mongol warriors to soil, insects and shoes, the author suggests they are dirty, disgusting or even pests.

Source 22 This statue of Genghis Khan stands 40 metres tall. It is situated in the Mongolian capital, Ulan Batar.

1 Powerful postures suggest that the warriors are fearless and strong.

2 Facial expressions are fierce and commanding, conveying power.

3 Horses are depicted as being powerful and agile.

4 Dust swept up and flags blowing high suggest menacing speed.

5 Elaborate uniforms and armour suggest wealth and high status, perhaps imperial leaders.

6 A variety of weapons, shields and horses indicate the versatility of the warriors.

Source 23 An artist's impression of Mongol warriors

14.5 CHECK YOUR LEARNING

Review and understand

1 **Define** the word 'cavalry'.

2 **Describe** how Genghis Khan broke down the old tribal loyalties in his new empire.

Apply and analyse

3 **Summarise** the main message conveyed in Source 14.

4 **Explain** the significance of horses in Mongol society. Refer to Sources 17 and 20 in your answer.

5 **Compare** the tone and point of view between Sources 21 and 23. Provide specific examples from both sources to help you talk about their similarities and differences.

Evaluate and create

6 **Evaluate** three changes made to the army by Genghis Khan by ranking their effectiveness. In your response, explain your rankings.

7 **Create** a table listing the main characteristics of the heavy cavalry and the light cavalry.

14A

RICH TASK

Quizlet
Revise the key terms you have learnt so far.

Oaths, loyalty and rivalry

In Mongol society, kinship and family loyalty were very important in maintaining the strength of the clan. A common practice between clans was to form alliances through becoming blood brothers, known as *anda*. This oath was meant to secure a bond between current or future khans and prevent any future rivalries. However, it was not always upheld.

Genghis Khan made many oaths, but as his power increased, these bonds broke. His childhood *anda*, Jamuka, continually betrayed him by launching many rebellions. After defeating Jamuka, Genghis Khan offered to reconcile with him, but Jamuka refused. Genghis Khan was reluctant to order Jamuka's death, but to be perceived as a strong leader, he had to remove the enemy. He ensured that the customs of an honourable death were followed for his blood brother.

Sources 24 to 26 outline the relationships formed by Genghis Khan, and the conflicts he had with his own sons.

Source 24

When he came to Toghrul, Temujin said, 'Since in earlier days you and my father declared yourselves sworn friends you are, indeed, like a father to me' … Thereupon, he gave him the black sable coat. Toghrul was very pleased. He said, 'In return for the black sable coat, I shall bring together for you your divided people; In return for the sable coat, I shall unite for you your scattered people.'

Extract from *The Secret History of the Mongols*, *c.* thirteenth century, translated by Igor de Rachewiltz

Source 25

They declared themselves *anda* a second time. So Temujin and Jamuka said to each other: 'We've heard the elders say, "When two men become *anda* their lives become one. One will never desert the other and will always defend him." This is the way we'll act from now on. We'll renew our old pledge and love each other forever.'

Temujin took the golden belt he'd received … and placed it around Anda Jamuka's waist … Jamuka took the golden belt he'd received … and placed it around the waist of Anda Temujin … they pledged their friendship and promised to love one another.

Extract from *The Secret History of the Mongols*, *c.* thirteenth century, translated by Francis Woodman Cleaves

Source 26

When Jochi, Chagadai, and Ogodei [Genghis Khan's sons] took the city of Gurganj they divided the city's people three ways and didn't leave a part for Genghis Khan … [he] yelled at the three of them, and for three days he wouldn't see them. Then his three commanders … petitioned him, saying: … 'Just when our wealth has grown like Heaven and Earth, when the Moslems are forced to bow at our feet, when our armies are rich and happy, why has the Khan grown angry? Your sons know what they've done wrong but now they're afraid of your anger. If you continue this way you may break their spirits. Let them come see you face to face.'

This pacified Genghis somewhat and he allowed his three sons, Jochi, Chagadai, and Ogodei, to present themselves … yelling at them till their feet sank into the Earth where they stood, till the sweat on their foreheads soaked thru to their feet, and still he continued to censure them.

Extract from *The Secret History of the Mongols*, *c.* thirteenth century, translated by Francis Woodman Cleaves

Note: These sources all come from *The Secret History of the Mongols*, which is the oldest surviving medieval text written in Mongolian.

KEY SKILL
Communicating & reflecting

Writing an extended response

Historians assess sources and weigh up the evidence presented to them. They can then form their own opinion and make a judgment as to what they believe happened in the past. This is known as an evaluation. Communicating how you have evaluated information and formed your own opinion is an important skill. You should always acknowledge the various viewpoints or both sides of the debate in your writing before providing an overall opinion. A formal response should be written in the third person.

Below is a suggested approach to structuring an extended response answer.

Step 1 Think about the evidence: You need to assess the information and form your opinion before writing in order to plan your response accurately. Have a discussion with a partner to help you clarify your thoughts.

Step 2 Set the scene: Write a short introductory paragraph outlining the 5Ws of history (who, what, when, where and why). Then signpost the two different arguments to be discussed/debated in your answer.

Step 3 First argument: The first body paragraph should discuss one side of the argument or viewpoint. Follow the TEEL paragraph structure (see page 219 of 'The history toolkit') to help you.

Step 4 Alternate argument: The second body paragraph will raise the other side of the argument or alternative viewpoint. To highlight this change in the direction of the argument, start your paragraph with a linking phrase such as 'however', 'despite this' or 'alternatively'.

Step 5 Communicate your opinion: In your conclusion, you must explain which argument you believe is the strongest and why. How did you prioritise one viewpoint over another? What factors did you consider more important when making a decision? Sometimes your opinion will be based on a mix of both sides, though usually your opinion will – even if only slightly – lean more to one side.

In the conclusion, you can also raise whether you think information or evidence is missing that could possibly change the debate altogether.

For more information on this key skill, refer to page 218 of 'The history toolkit'.

Practise the skill

1 Using empathy, **discuss** with a partner how Genghis Khan may have felt throughout his life in regard to his relationships with family and friends.

2 'Tragedy, betrayal and disappointment from loved ones turned Genghis Khan into a ruthless Mongol warrior.' **To what extent** do you agree? Write an extended response debating this statement. Use examples and refer to Sources 24 to 26 in your response. Conclude by communicating your own opinion about the character traits and events that made Genghis Khan such a powerful leader.

Extend your understanding

1 According to Sources 24 to 26, what common practice occurred during an oath?

2 In small groups, **create** a role-play. Choose either Source 24, 25 or 26 and conduct some extra research on the event or people described. Write a script depicting the various perspectives of those involved, and present it to the class.

Source 27
Mongolian belts with elaborate brasswork were swapped between blood brothers.

14.6 Expansion of the Mongol Empire under Genghis Khan

In this topic, you will:

» explore the cause and effect of conquests led by Genghis Khan
» map the extent of the Mongol Empire's expansion under Genghis Khan.

Sequence this!
Expansion of the Mongol Empire under Genghis Khan

See, think, wonder
Look at Source 1.
- What do you see?
- What do you think?
- What do you wonder?

The Mongol Empire expanded for a number of reasons. Living conditions in the Mongol homelands in the eastern part of the Eurasian Steppe were very harsh – even in good seasons. From around 1180 to 1220, the steppe experienced unusually cold weather. As a result, there was less grass available, which meant that the Mongols needed to find alternative ways of providing for themselves and their animals. This was a strong motivating factor for expanding their territory.

Another key factor for expansion was the will of Genghis Khan. Only a few years after becoming Mongol leader, he began a policy of conquest that would eventually see him control a vast empire that stretched over much of Central Asia and Eastern Europe.

Conquests in China

One of Genghis Khan's first concerns as Mongol leader was to invade and conquer territory in China. China at this time had been a divided country for many years. The Jin Dynasty ruled in the north, the Xia Dynasty in the north-west, and the Song Dynasty in the south.

Source 1 The remains of a 'Chinese pyramid' tomb in the Western Xia mausoleums, Yinchuan, China

Traditionally, the Mongols had traded with these dynasties for the items that they needed but could not produce themselves (such as grain, metals and fabrics). This made the Mongols heavily dependent on the Chinese, and gave the Chinese a great deal of power over the Mongols. In the early thirteenth century, the Chinese tried to limit trade with the Mongols. At first, the Mongols issued threats and launched raids against the Chinese. Soon, though, Genghis Khan launched a full-scale attack.

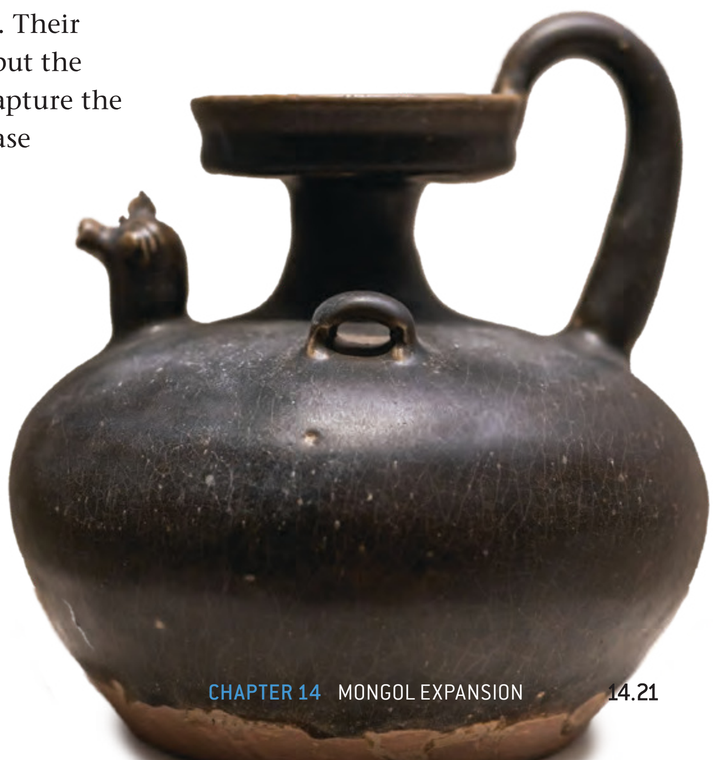
In 1209, the Mongol army attacked a Chinese tribal group known as the Tanguts, which was under the rule of the Xia Dynasty. The Tanguts commanded a strong army and were protected by walled cities. These types of defences were still quite new to the Mongols and it took them time to develop ways to defeat them.

Source 2 The Great Wall of China was built by the Chinese to keep out Mongol invaders, led by Genghis Khan.

Initially, Mongol forces simply laid **siege** to these cities – waiting outside the walls until the starving citizens surrendered. Over the course of the conflict with the Tanguts, though, the Mongols learned many new warfare tactics, including how to invade fortified towns using ramps.

siege
a military strategy to weaken an area by cutting it off from the outside world

Around 1215, Genghis Khan attacked the Jin Dynasty. Their territory was protected behind the Great Wall of China, but the Mongol army was able to break through its defences to capture the Jin capital, Beijing. Genghis Khan was then able to increase his army with many Chinese recruits, who brought with them knowledge of new weapons and explosives, siege engines (devices to break down city walls) and ships. More importantly, the Mongols now had access to all of the goods they had once had to trade for. The expansion of the empire had begun in earnest.



Source 3 A Jin Dynasty porcelain jug with a spout shaped like a chicken head; it was discovered at Zhenjiang, China, in 1969.

Conquests in Central Asia and Russia

Next, Genghis Khan set his sights on the Khwarezm Empire – a large territory in western Central Asia. Initially, Genghis Khan was interested in becoming trading partners with Khwarezm, so in 1218 he sent a group of Mongol merchants to establish trading ties. However, the governor of Khwarezm became suspicious and attacked the group. Genghis Khan was deeply insulted and immediately moved to take revenge. He planned one of his largest invasion campaigns to date, gathering over 200 000 soldiers and leading them into Khwarezm. The Mongol conquest of Khwarezm was brutal. A large percentage of the population was massacred.

Genghis Khan then moved towards Persia in 1219. Northern India and Afghanistan were also brought into the Mongol Empire. The Rus (early ancestors of modern-day Russians) and the Bulgars (early ancestors of modern-day Bulgarians) challenged the Mongols, but both of these armies were defeated.

At the time of Genghis Khan's death in 1227, the Mongol Empire stretched almost 3000 kilometres from east to west (see Source 6).

Source 4 A copper coin from the Khanate of the Golden Horde

Source 5 The ruins of Ayaz-Kala, a Khwarezm fortress in the Kyzylkum Desert, Uzbekistan

THE EXPANSION OF THE MONGOL EMPIRE

Source: Oxford University Press

Source 6 A map showing the expansion of the Mongol Empire, including the positions of the Mongol capitals: Karakorum (1235–60) and Dadu (from 1272; Dadu is modern-day Beijing)

Document
Asia: Blank map

14.6 CHECK YOUR LEARNING

Review and understand

1 **Describe** why invading and conquering China became one of Genghis Khan's main concerns as the Mongol leader.

2 **Identify** why the Mongols initially found it difficult to conquer the Tanguts. What was the main reason?

Apply and analyse

3 **Explain** why Genghis Khan invaded Khwarezm. What was his primary motivation?

Evaluate and create

4 On a blank map, show the extent of Mongol Empire in the thirteenth century. Using the world map at the back of this book, label all the modern-day countries that were part of the empire. Add any distinct physical features, such as mountains, deserts, rivers and seas. Create a suitable legend for the map.

5 **Research** developments in Mongol weaponry during the Mongol Empire's period of expansion. Discuss how these developments contributed to the Mongols' success in expanding their empire.

14.7 Expansion under Ogodei and his heirs

In this topic, you will:

» outline the political changes made by Mongol leaders as they assumed control of settlements across Europe and Asia.

Sequence this!
Expansion under Ogodei and his heirs

Before his death, Genghis Khan divided the Mongol Empire into four parts. Three were given to his sons Ogodei, Chagatai and Tolui. The fourth part was given to the wives and family of his eldest son, Jochi, who had died shortly before Genghis Khan. On Genghis Khan's death, Ogodei – the third son – became Great Khan. He soon set about expanding the empire once more.

Ogodei Khan

Ogodei was confirmed as Great Khan in 1229. The main achievements of his reign were:

- the invasion of Russia and Eastern Europe
- the establishment of the Golden Horde – a vast Mongol territory that stretched from the Danube River, across the top of the Black and Caspian Seas, into Siberia (see Source 11 in topic 14.8)
- the completion of the conquest of the Jin Dynasty in northern China and Manchuria.

Source 7 An artist's impression of the Great Khan Ogodei

Ogodei Khan turned the settlement of Karakorum into the first Mongol capital, building a large city wall around it in 1235. By European standards of the time, Karakorum was not impressive; this is not surprising when you consider that the Mongols were not natural city-dwellers.

Under the rule of Ogodei Khan, new regulations were introduced across the empire to encourage and develop trade. These included the standardisation of weights and measures, and the introduction of paper money (an idea borrowed from the Chinese). Paper money was easier to carry on long journeys than gold and silver.

Renewed expansion of the empire

Under Ogodei Khan's leadership, the Mongol Empire continued to grow. In 1235, after conquering the Jin Dynasty, Ogodei Khan decided to expand his empire westwards. The first stage of the assault, in 1237, was directed against the Bulgars on the Volga River (see Source 5 in topic 14.6). A series of campaigns against the Russians followed between 1237 and 1240, under the leadership of Batu Khan, Ogodei's nephew.

The Mongols then invaded eastern Europe in 1241 in a two-pronged attack. A smaller force attacked through Poland and headed towards eastern Germany. It defeated a combined European army of Poles, Czechs and Germans in 1241 at Legnica in Poland. The larger Mongol force attacked Hungary and crushed its army at Mohi, two days after the victory at Legnica. Hungary was occupied and seemed destined to become part of the empire. The Mongols continued their advance to the west, as far as Austria. At this point they seemed on the verge of conquering all of Western Europe.

However, in December 1241, Ogodei Khan died. In response to this, the Mongol forces withdrew from Europe and returned to their homelands to decide on the next leader.

Think, pair, share

- Think about what contributed to the success of the Mongol Empire's expansion into Western Europe.
- Discuss your ideas with a partner.
- Share your thoughts with the class.

Power struggles

When Ogodei Khan died in 1241, there was much disagreement about who should be appointed Great Khan. At this time, there were signs that the empire was starting to break up into different regions – based largely on areas that certain khans had conquered and controlled. These khans could not agree on a single leader to become Great Khan. After a five-year stalemate, in 1246 Guyuk (Ogodei's son) was appointed leader. He died only two years later, and his mother Toregene then became **regent** for a few years. In 1251, Guyuk's cousin Mongke (Genghis Khan's grandson) was elected as Great Khan.

regent
a person who rules in place of a monarch who is temporarily absent from the country (e.g. fighting a war) or who is too young or sick to rule

Source 8 An illustration from a 1353 **manuscript** showing the Battle of Legnica in 1241, in which the Mongols defeated the combined forces of Poles, Czechs and Germans

manuscript
in the medieval sense, a document written by hand (usually by monks)

Mongke Khan

Mongke Khan quickly carried out a series of important reforms (see Source 9) and military campaigns. Under his leadership, the Mongol Empire became powerful once more. Mongke Khan sent his brother Kublai to take the city of Dali (in south-west China) in 1254. He also sent other generals to attack Annam (in Vietnam) and the area surrounding it. He continued to push into Tibet, India and parts of the Middle East – eventually reaching the Egyptian border.

Mongke Khan appointed another brother, Hulagu, to take charge of Persia. In the 1250s, the Mongol army attacked and conquered the city of Baghdad. It then moved into Palestine.

At this time, Mongke Khan was still fixated on conquering the remainder of China. Kublai was ordered to supervise northern China, while Mongke Khan renewed his assault on the Song Dynasty in southern China. Mongke Khan took personal command of the army and attacked the province of Sichuan in 1258. However, he died in August 1259, during a siege.

Some of Mongke Khan's reforms

- Ordered a census of households, fighting men, fields, livestock, vineyards and orchards to help establish a fixed tax
- Continued to exempt religious leaders from taxation, and allowed his people religious freedom
- Appointed or confirmed leadership positions in the Buddhist and Taoist religions, and intervened to resolve religious disputes
- Established a department of monetary affairs that controlled the issue of paper money

Source 9 Some of the reforms implemented by Mongke Khan

14.7 CHECK YOUR LEARNING

Review and understand

1 **Identify** when Genghis Khan's son Ogodei was elected as Great Khan.

2 **Outline** two of Ogodei Khan's main achievements as Great Khan.

Apply and analyse

3 In history, it is interesting to consider 'what if' scenarios.

- With a partner, reflect on how the Mongol Empire might have been different if Ogodei had not died so soon after the successful attack in Hungary.
- Look at Source 5 on page 14.23. **Analyse** the position of the Mongol Empire at the time.
- Form a hypothesis and write a supporting paragraph to **summarise** what may have occurred had Ogodei Khan lived longer.

Evaluate and create

4 **Create** a flow chart to show the changes in Mongol leadership over the period 1229 to 1260.

5 **Evaluate** the success of some of the main reforms introduced by Mongke Khan. To evaluate, you should consider the strengths and weaknesses of these reforms before giving your overall opinion of their success.

14.8 Kublai Khan and conquests in Asia

In this topic, you will:

- explore the rise and achievements of Kublai Khan in China
- study the extent of the Mongol Empire's expansion under Kublai Khan on a map
- outline the events of the Rebellion of Nayan.

khanates
regions (similar to a state or territory) of the Mongol Empire; the Mongol Empire eventually split into four khanates, each administered by a different khan

After Mongke Khan's death, there was once again a power struggle to decide who would become the next Great Khan. This carried on for years and eventually resulted in a civil war.

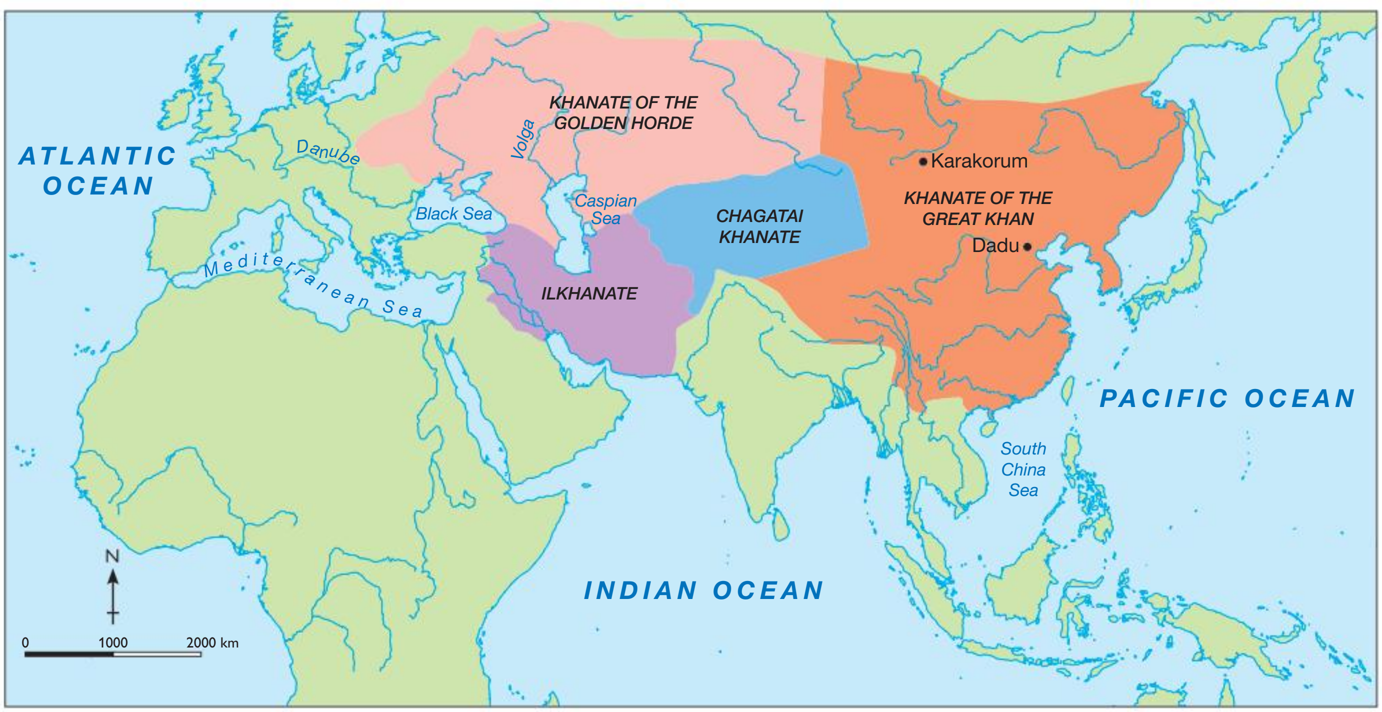
An empire divided

By 1263, the result was an empire split into four regions known as **khanates**. Each khanate was administered and controlled by a different khan (see Sources 10 and 11). Over time, each khanate began to take on its own characteristics and adopt different traditions from the region, such as religions and languages.

Khanate of the Great Khan	• Led by Kublai Khan (1215–94) • Covered parts of China during the Yuan Dynasty • Mongols in the region adopted many Chinese customs
Khanate of the Golden Horde	• Controlled by Batu Khan (1207–55) • Covered regions of Central Asia and Russia • Mongols in the region adopted many Russian customs • Internal fighting among Mongol leaders in the region resulted in loss of Mongol control
Ilkhanate	• Controlled by Hulagu Khan (1217–65) • Covered parts of the Middle East • Mongols in the region converted to Islam • Turkish became the common language
Chagatai Khanate	• Administered by Chagatai Khan (*c*. 1185–1242) • Covered parts of modern-day Mongolia

Source 10 The four khanates of the Mongol Empire

THE MONGOL EMPIRE AND ITS FOUR KHANATES



Source 11 Source: Oxford University Press

The rise of Kublai Khan

Analyse this!
The coronation of Kublai Khan

From around 1264, after many battles, Kublai gradually became accepted unofficially as Great Khan. The brother of Mongke and the grandson of Genghis, Kublai Khan would go on to rule for 30 years. Throughout his rule there were many attempts to rebel against his leadership – mainly from his relatives.

Source 12 This engraving of the coronation of Kublai Khan first appeared in the thirteenth-century French book *La Fleur des Histoires de la Terre d'Orient*, and shows a very European interpretation of the event.

The conquest of southern China

emperor
someone who rules an empire; namely a group of countries and/or areas often speaking different languages and having different cultures, but centrally ruled

Almost immediately after taking power, Kublai Khan continued the conquest of the Song Dynasty in southern China, which Mongke had begun before his death. Kublai Khan's army took the Song capital, Hangzhou, in 1276, and wiped out the remains of any resistance by 1279. Kublai Khan now controlled northern and southern China, where he founded a new imperial dynasty, known as the Yuan Dynasty – China's first foreign-led dynasty. At this time, Kublai Khan also declared himself the **emperor** of the Yuan Dynasty. He renamed his base in China Dadu (meaning 'great capital'). From these roots grew the city we know today as Beijing.

Governing China

Kublai Khan understood the importance of agriculture and appreciated both architecture and city life. As a result, the destruction of homes and temples across southern China was kept to a minimum – this was very unlike the way earlier khans had treated cities they conquered in China's north. In the south, landowners who surrendered to Mongol rule were allowed to keep their estates. This move helped to ensure their loyalty to the new regime.

The Mongols adopted any institution and employed any servant (including foreigners) who would provide effective government, as long as nothing was done to endanger Mongol military power. The large amounts of money the Mongols earned from taxes suggest that this policy worked.

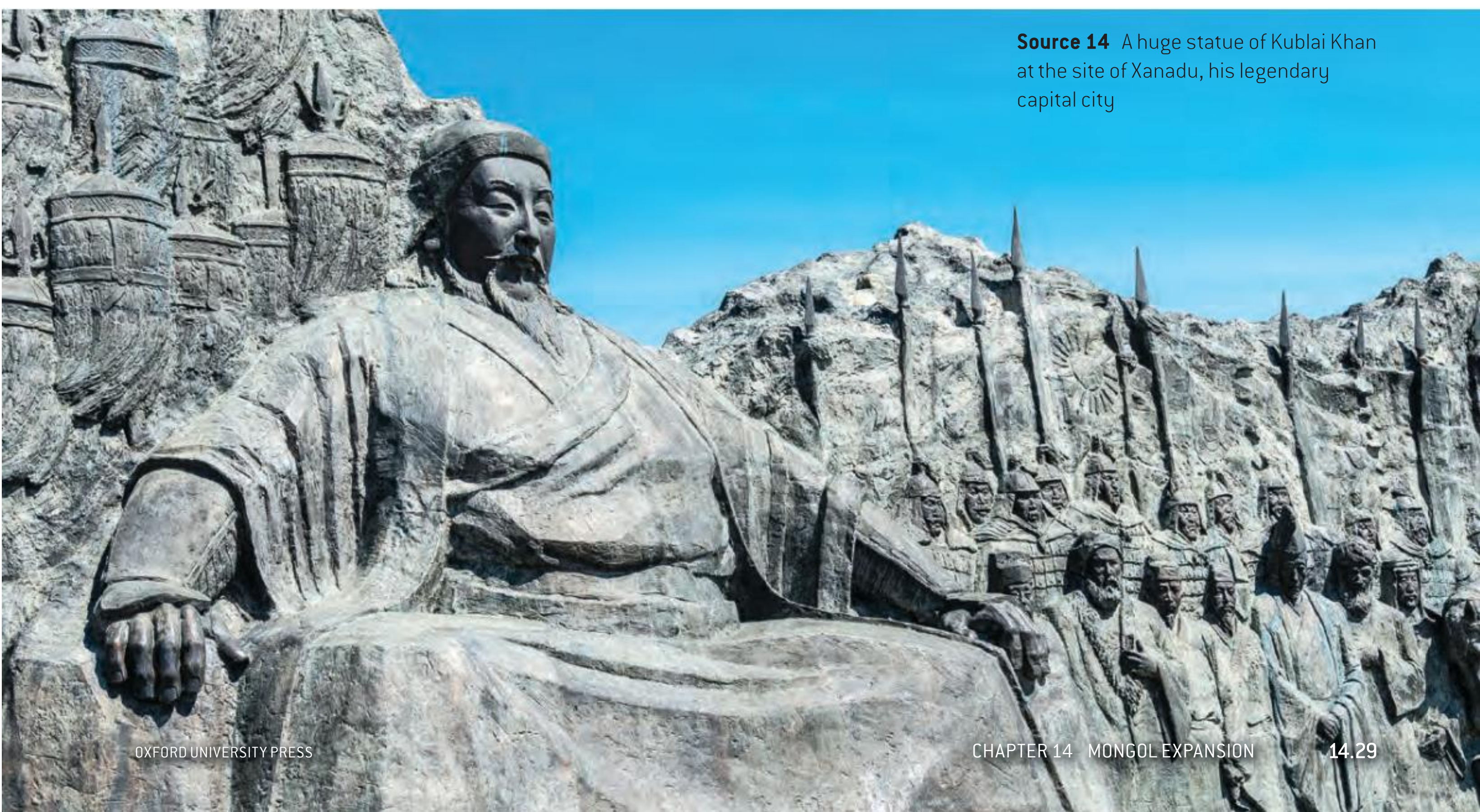
Chinese junior civil servants were allowed to keep their positions. However, Kublai Khan preferred to appoint administrators from other parts of the Mongol Empire for the highest offices. For example, he put a Muslim governor from the west in charge of Yunnan in the east, and a Tibetan officer from the far west in charge of temple renovation in Hangzhou on the east coast. He also gave a number of official posts to the European traveller and writer Marco Polo.

Source 13

The Great Khan chose 12 barons to whom he entrusted all the necessary affairs of 34 provinces of Cathay [China]. These 12 barons reside all together in a very rich and handsome palace, which is inside the city of Cambaluc [Beijing] ... To every province is assigned a judge and several clerks; and all reside in this palace … But the power of those 12 barons is so great that they choose the governors for all those 34 great provinces. Only after they have chosen do they inform the emperor of their choice. This he confirms, and grants to the person nominated a tablet of gold such as is appropriate to the rank of his government.

Those 12 barons also have such authority that they can send the armed forces wherever and in whatever strength they please. This is done of course with the emperor's awareness … They are called 'The Supreme Court', as is the palace where they abide.

Extract written by Marco Polo regarding the leadership of Kublai Khan, *c.* thirteenth century, from *The Book of Ser Marco Polo: The Venetian Concerning Kingdoms and Marvels of the East*, Vols 1 and 2, translated and edited by Colonel Sir Henry Yule, Charles Scribner's Sons, 1903



Source 14 A huge statue of Kublai Khan at the site of Xanadu, his legendary capital city

Crushing opposition

warlords
people who both rule a society (or community) and head up its military operations

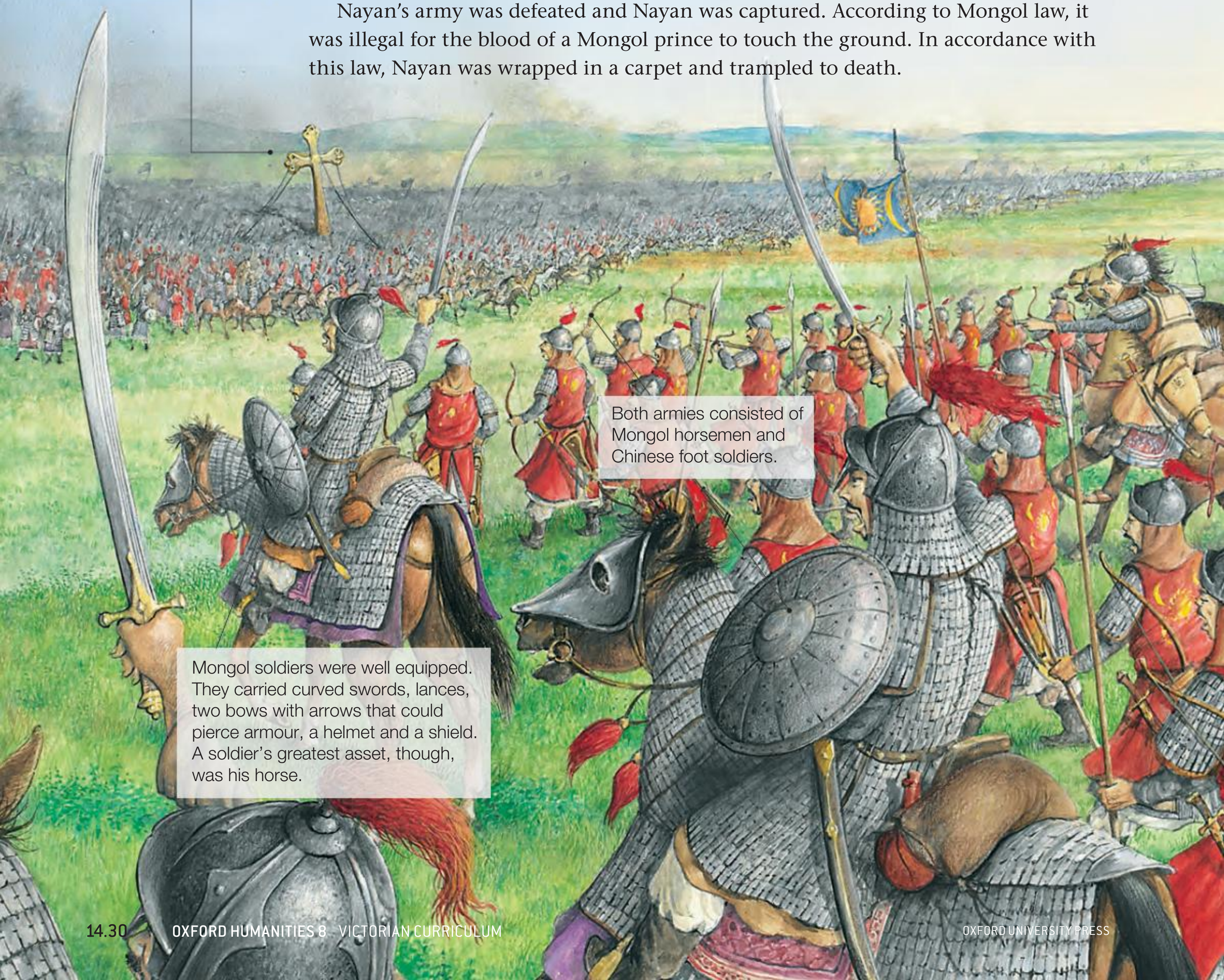
Despite many laws and new policies introduced to govern China and protect his power, Kublai Khan still faced opposition – both from the Chinese and from rival Mongol khans and **warlords** keen to overthrow him.

In 1287, a Mongol warlord and prince by the name of Nayan rose up against Kublai Khan in a great battle known as the Rebellion of Nayan. The battle was fought on the grasslands of Mongolia in north-eastern China. Nayan ruled an administrative region within the Mongol Empire. He challenged Kublai Khan, and demanded greater independence from the laws and bureaucracy governing the empire.

Kublai Khan, now in his seventies, personally led his troops into battle against Nayan. He was so overweight that he was no longer able to ride. Instead, he travelled in a mobile fort carried by four elephants, known as a palanquin.

Both armies were made up of Mongol horsemen and Chinese foot soldiers. Marco Polo accompanied Kublai Khan and his army and wrote about what he saw. According to his records, hundreds of thousands of troops fought on both sides.

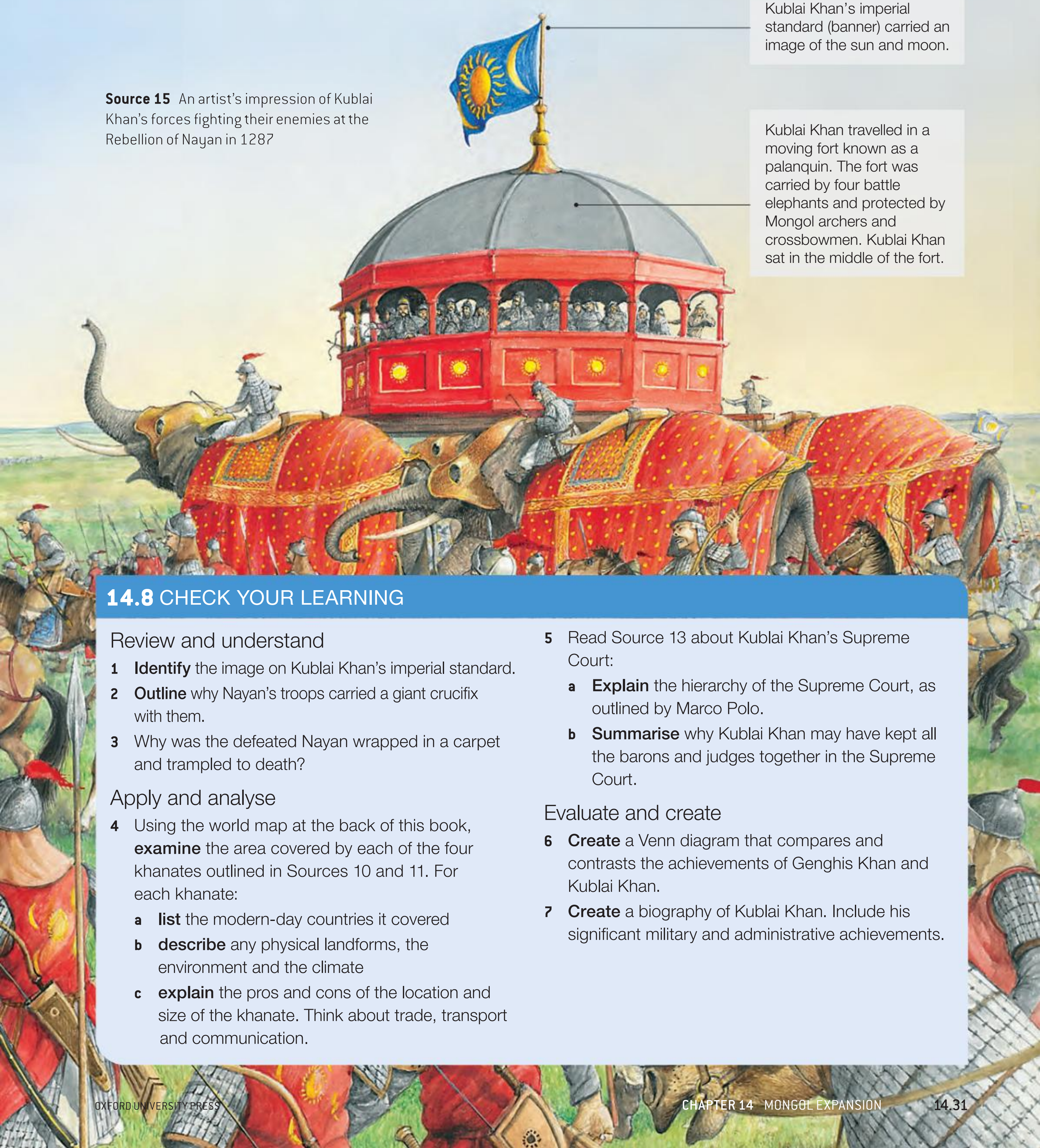
Nayan's army was defeated and Nayan was captured. According to Mongol law, it was illegal for the blood of a Mongol prince to touch the ground. In accordance with this law, Nayan was wrapped in a carpet and trampled to death.



Nayan was a member of the Nestorian Church (a tradition of eastern Christianity) and his troops carried a large cross in the belief that the Christian God would come to his aid.

Both armies consisted of Mongol horsemen and Chinese foot soldiers.

Mongol soldiers were well equipped. They carried curved swords, lances, two bows with arrows that could pierce armour, a helmet and a shield. A soldier's greatest asset, though, was his horse.



Source 15 An artist's impression of Kublai Khan's forces fighting their enemies at the Rebellion of Nayan in 1287

14.8 CHECK YOUR LEARNING

Review and understand

1. **Identify** the image on Kublai Khan's imperial standard.
2. **Outline** why Nayan's troops carried a giant crucifix with them.
3. Why was the defeated Nayan wrapped in a carpet and trampled to death?

Apply and analyse

4. Using the world map at the back of this book, **examine** the area covered by each of the four khanates outlined in Sources 10 and 11. For each khanate:
   a. **list** the modern-day countries it covered
   b. **describe** any physical landforms, the environment and the climate
   c. **explain** the pros and cons of the location and size of the khanate. Think about trade, transport and communication.
5. Read Source 13 about Kublai Khan's Supreme Court:
   a. **Explain** the hierarchy of the Supreme Court, as outlined by Marco Polo.
   b. **Summarise** why Kublai Khan may have kept all the barons and judges together in the Supreme Court.

Evaluate and create

6. **Create** a Venn diagram that compares and contrasts the achievements of Genghis Khan and Kublai Khan.
7. **Create** a biography of Kublai Khan. Include his significant military and administrative achievements.

14.9 End of Mongol rule in Asia

In this topic, you will:

» analyse the reasons for the decline of the Mongol Empire.

Source 16 This portrait of Kublai Khan was created by Nepalese artist Anige in 1294, shortly after Kublai Khan's death. It is painted using a Chinese portrait style popular at the time.

One of the effects of shifting the Mongol centre of power from the old capital of Karakorum to the new capital in Dadu, China, was that regions of Central Asia became more difficult to oversee. These areas gradually slipped from Kublai Khan's direct control. At this time, he was more intent on spreading Mongol influence further into South-East Asia, with hopes of even controlling the wealthy trading island Java (a part of modern-day Indonesia); however, this was not to be.

Failed expansion into Japan

Kublai's campaigns against the Song Dynasty had introduced him to ships. Now with ships of their own, the Mongols launched two attacks on Japan, one in 1274 and another larger one in 1281. Both attempts to conquer Japan were disastrous, largely because of bad storms at sea. The Japanese named the stormy typhoon winds that ended the larger Mongol invasion of 1281 the kamikaze ('divine winds'), because they believed the gods had sent these winds to protect and defend them.

Source 17 A thirteenth-century Japanese painting showing Japanese warriors boarding a Mongol ship in 1281

End of Mongol rule in China

Kublai Khan died in 1294. After his death, Mongol control over China weakened. A series of natural disasters contributed to the problems facing the Mongols in China, including extensive flooding of the Yellow River and outbreaks of disease. In fact, the outbreak of disease in 1353–54, which killed huge numbers of people in the region, was probably the **bubonic plague**. Many scholars believe Mongol traders then carried this disease across Asia into parts of Africa and Europe, leading to the deadly pandemic known as the **Black Death**.

bubonic plague
an infectious disease caused by bacteria (called *Yersinia pestis*), which are carried by fleas on rats and mice; it often quickly kills those who contract it

Black Death
a deadly plague that spread across Asia, Europe and Africa during the fourteenth century

The writings of William of Rubruck and Marco Polo

Much of what Western historians know about the Mongol Empire and some of its significant people comes from evidence provided by two written works:

- a journal written by William of Rubruck
- a book written by Marco Polo called *The Travels of Marco Polo*.

William of Rubruck (*c.* 1210–70) was a Franciscan monk. He had heard about the Mongols while fighting with King Louis IX of France in the Crusades (a series of wars fought by Christians and Muslims between 1096 and 1291 CE over control of the Holy Land). He wanted to gain the support of the Mongols against the Muslims in the Holy Land, so he undertook a three-year journey to the Mongol capital of Karakorum, travelling through the lands of the Golden Horde to get there. His account provides information not only about the lands he crossed, but also great detail about the people and customs of the regions he visited and the layout of the cities in which he stayed.

Marco Polo (1254–1324) was a Venetian traveller and merchant. At 17 years of age, he accompanied his father and uncle on a trip through Asia. He returned 24 years later. Five years after leaving Venice he was in Dadu, where he met Kublai Khan in 1276. He described what he saw and did (including the diplomatic duties he carried out for Kublai Khan) in his book, *The Travels of Marco Polo*.

Both of these historical sources provide a great deal of information and evidence about the Mongol Empire and the ways in which their society functioned. Much of what we know today has been attributed to them.

Unlike the work of William of Rubruck, the accuracy of Marco Polo's accounts is being questioned by some historians today. For example, English historian Frances Wood argues that the lack of detail about Chinese culture and customs in Marco Polo's book indicates that he never even reached China – instead using information from merchants and travellers he met closer to home.

For more information on this key concept, refer to page 201 of 'The history toolkit'.

KEY CONCEPT
Evidence

Watch it!
A video and quiz on Marco Polo

Source 18 An artist's impression of Marco Polo (along with his father and uncle) meeting Kublai Khan

14.9 CHECK YOUR LEARNING

Review and understand

1 **Identify** two of the primary sources of evidence that Western historians have relating to the life and times of Kublai Khan.

Apply and analyse

2 Kublai Khan and Marco Polo came from different cultures. **Compare** the lives of these two men by talking about their similarities and differences.

Evaluate and create

3 **Create** a concept map that shows some of the factors that helped to end Mongol rule in China.

4 **Discuss** the cause and effect of environmental factors on the development and decline of the Mongol Empire. How important were these environmental factors?

5 **Examine** the images of Kublai Khan in Source 12 on page 14.28 and Sources 16 and 18 in this topic.
   a **Describe** the different ways in which Kublai Khan is presented in each of the artworks.
   b How accurate do you think each of these portrayals of Kublai Khan is? **Justify** (give reasons for) your response.
   c **Evaluate** how useful each of these primary sources is to historians. What are their strengths and weaknesses? What is your overall opinion of them as useful sources?

14B RICH TASK

Mongol warfare

Quizlet
Revise the key terms you have learnt so far.

The Mongols created their empire by invading and conquering the peoples and lands surrounding their traditional homelands.

The speed, skill and discipline of the Mongol army, along with the way in which they treated the enemies they defeated, made them a truly terrifying force. Their traditional tactics and weapons, however, were not always effective against the armies and fortified cities they encountered as they ventured south and west. The Mongols' ability to adapt their fighting methods to new challenges and technologies was a significant factor in their success.

The introduction of the catapult to siege warfare has sparked historical debate. This weapon could hurl large objects over walls, like a giant slingshot. Accounts regarding the Siege of Saianfu (also called the Battle of Xiangyang), which lasted from 1267 to 1273, suggest different parties introduced the catapult as a siege weapon during the time of Kublai Khan. Some historians believe such weapons were used earlier than this, by Genghis Khan.

Source 19

As the Mongols chalked up victory after victory, they readily adapted any weapon or method of attack which was an improvement on their own. The catapult and the cataphract [a heavily armoured catapult] are two examples of this. The use of flaming naphtha [a flammable liquid] hurled into a walled city is another.

The art of the siege was unknown to the Mongols when Genghis Khan was forming his empire. His warriors quickly learned it when they invaded China.

Extract from Robert Webb, *Genghis Khan: Conqueror of the Medieval World*, Franklin Watts, 1967

Source 20

Saianfu is a very great and noble city … [It] held out against the Great Kaan for three years …

Marco said: 'We could find you a way of forcing the city to surrender speedily … we have with us among our followers men who are able to construct catapults which shall cast such great stones that the garrison will never be able to stand them …'

The Kaan bade them with all his heart have such catapults made as speedily as possible … for I tell you that in all those parts they know nothing of catapults …; and they were so far from being accustomed to employ them in their wars that they had never even seen them, nor knew what they were.

Extract from Marco Polo, *The Travels of Marco Polo*, written in the thirteenth century; Marco Polo arrived in Asia in 1271

Source 21 This manuscript illustration, from the 1307 *World History of Compendium of Chronicles* by Rashid al-Din, shows the Mongols besieging a city using a catapult. The script on this page states that Muslim engineers introduced it: 'Before that there had not been any large Frankish catapult in Cathay [China], but Talib, a catapult-maker from this land … and his sons Abubakr, Ibrahim, and Muhammad, and his employees made seven large catapults and set out to conquer the city, [Saianfu, modern-day Xiangyang].'

KEY SKILL
Analysing sources

Analysing a source using DAMMIT U

When presented with a historical source to analyse, the use of an acronym such as 'DAMMIT U' can make it easier to analyse and structure your response.

When structuring a written response, 'DAM' can be summarised in one to three sentences, whereas 'MIT' should provide examples from the source to support your analysis. Examples may be in the form of a short quotation (three to seven words is adequate) in which you explain its meaning. For a visual source, you can refer to a feature or symbol in the source and explain why it is relevant.

Overall, a historical source analysis covering 'DAMMIT' would form a paragraph of eight to ten sentences. Discussing usefulness often requires its own paragraph. It can also include examples and should always discuss at least one strength or weakness.

For more information on this key skill, refer to page 216 of 'The history toolkit'.

Source 22 The 'DAMMIT U' acronym.

Acronym	The questions you should ask when looking at sources
Date	When was the source created? Is it a primary or secondary source? A primary source may show attitudes, whereas a secondary source is often a factual interpretation.
Author	Who is the author of the source? Think about their gender, age, and profession. For example, they could be a historian, an aristocrat, or a prisoner.
Material	Is the source written, oral or visual? It could be a newspaper, letter, diary, photograph, textbook or tweet, or even a graph or map.
Motive	Why did the author produce this source? Was it for official government use, the media or personal reasons? A historian tries to establish the context of the source to help understand the perspective of the person who created it.
Intended audience	Who was the source produced for? Was it for academics or the general public? Was it intended to be viewed, or was it meant to be private?
Tone	How is the information in the source expressed? How does it make you feel? Words to describe tone can include 'persuasive', 'critical', 'questioning', 'funny' or 'reflective'. Often, primary sources are more emotional than secondary sources, which tend to be factual as they are written in hindsight.
Usefulness	What are the strengths and weaknesses of the source as piece of evidence? Sources can be factual and accurate, or they can be exaggerated and contain bias. They may have the detail of an eyewitness, or the advantage of hindsight. A source may be an oral history, or it may be written down. All of these can affect how useful the source is.

Practise the skill

1 Complete a source analysis on Sources 19 to 21 using the 'DAMMIT U' acronym to help structure your response.

2 Which source is the most reliable in this debate? **Evaluate** each source by listing their strengths and weaknesses, and giving your overall opinion on the debate.

Extend your understanding

1 Perform **research** on the contestability of the travel accounts written by Marco Polo. As a class, have a debate – with various groups supporting the different arguments presented by historians. Use this catapult case study as an example.

14.10 The impact of expansion on traditional Mongol life

In this topic, you will:

- investigate how political and economic developments made by the Mongol Empire impacted society
- assess the progress made by the Mongol Empire in establishing laws for society.

See, think, wonder

Look at Source 1.

- What do you see?
- What do you think?
- What do you wonder?

The expansion of the Mongol Empire brought about massive changes – not only to the societies that it conquered, but also to Mongol society itself. The traditional nomadic lives of many Mongol people changed significantly as the empire grew, cities were established and government regulations (in the form of laws and taxes) were introduced.

Genghis Khan is remembered for several great innovations in society, discussed below.

Source 1 An example of the 'square script' commissioned by Kublai Khan, on an official pass from the Yuan Dynasty (1271–1368)

The introduction of a written language

In 1204 Genghis Khan ordered the development of a written language, which was based on a regional script used within part of the empire. Under Kublai Khan, a written language known as the 'square script' (see Source 1) was commissioned, to replace the many languages used across the empire. It was completed in 1269 and used mainly for official purposes.

The creation of a single legal system

Before Genghis Khan united the Mongol clans and formed the empire, there was no single set of laws. To resolve this, Genghis created a legal system that would apply across all the lands he controlled. This system was known as the *Yasa*. Some of the laws imposed under his rule can be seen in Source 2.

Laws under the rule of Genghis Khan
All children were considered legitimate, whether born to a wife or a concubine (mistress)
It was illegal to buy or sell a woman, or kidnap a woman to marry
No Mongol could enslave another Mongol
Hunting was forbidden during the animal breeding season (March to October)
Livestock theft was punishable by death
Hunters could kill only what was needed for food

Source 2 Some of the laws imposed under Genghis Khan's rule

The introduction of the census

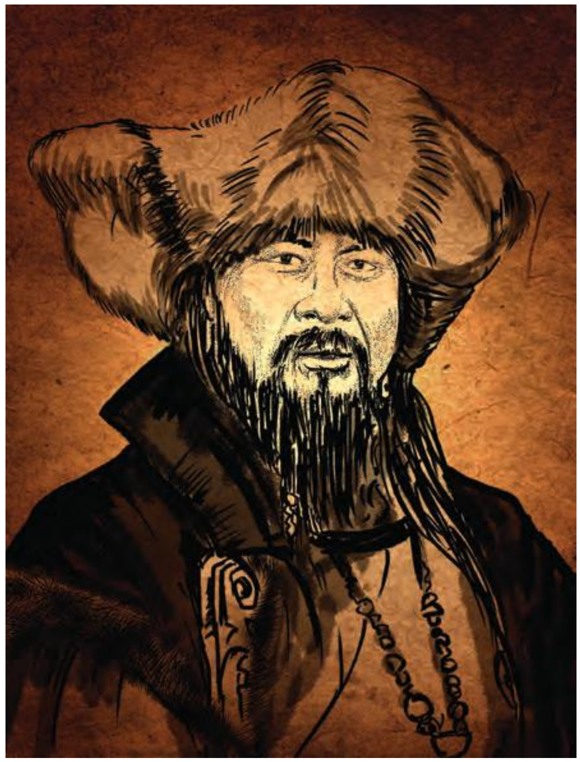
With the creation of the Mongol Empire came the **census**. All existing and new territories had to submit to a census in order to provide the administration with an idea of the size and number of people living in various parts of the empire. This ensured that the khan knew details of the population and value of his empire. For an empire with a strong army, it was important to know where the money and other important holdings were if they had to be secured quickly for the defence of the state.

census
a 'head count' or audit of the number of people living in a particular place at a particular time; information collected during a census often includes age, occupation, income, etc.

The introduction of taxation

After his defeat of the Jin Dynasty in China, Genghis Khan selected a former Jin minister, Yelu Chucai, as one of his key advisers. Yelu Chucai created an effective and efficient administration system that included a taxation scheme for everyone living in the empire.

Whenever new territory was taken over, a *darugha* was appointed. The *darugha* was in charge of taxes and administration of a province within the Mongol Empire. He had authority over any previous local rulers, and could charge taxes as he saw fit. A *darugha* would usually impose taxes of 1 per cent on herds, and up to 5 per cent on commercial transactions. Before the formation of the Mongol Empire, no members of Mongol tribal groups were required to pay taxes to the khan, so this was a significant change to traditional society.



Source 3 A modern artist's impression of Yelu Chucai

Religious tolerance in the Mongol Empire

The acceptance of different religions during the Mongol Empire's expansion is an interesting topic to think about in terms of cause and effect. As you read the information below, think about the events you consider to be causes, and those you consider to be effects.

When Mongol forces conquered and invaded new territories, Mongol rulers encouraged religious freedom. Kublai Khan, for instance, never proclaimed his belief in any one religion. Such an approach helped to ensure the support of many different religious groups in his empire.

In addition, many of the invading Mongols themselves adopted the religious beliefs and practices of the people they conquered. For instance, Buddhism flourished in the eastern khanates, while Islam became the dominant religion in the western khanates.

For more information on this key concept, refer to page 200 of 'The history toolkit'.

KEY CONCEPT
Cause & effect

Quiz me!
A quick quiz on the impact of expansion on traditional Mongol life.

yam
a communication system that covered all regions of the Mongol Empire; stations were set up to provide food, shelter and horses to messengers in this system

The introduction of a communication system

Genghis Khan and the rulers who followed him developed a complex communications system that covered the whole Mongol Empire. It was known as the ***yam***. The *yam* operated by setting up a series of staging posts (designated places where people could stop during a long journey) across the empire. Each was 40 kilometres from the next – the distance a good horse could cover at a gallop without needing to stop. Every post was guarded by at least 10 men and contained food, shelter and horses. The *yam* was capable of carrying messages from one side of the empire to the other at the rate of nearly 200 kilometres a day.

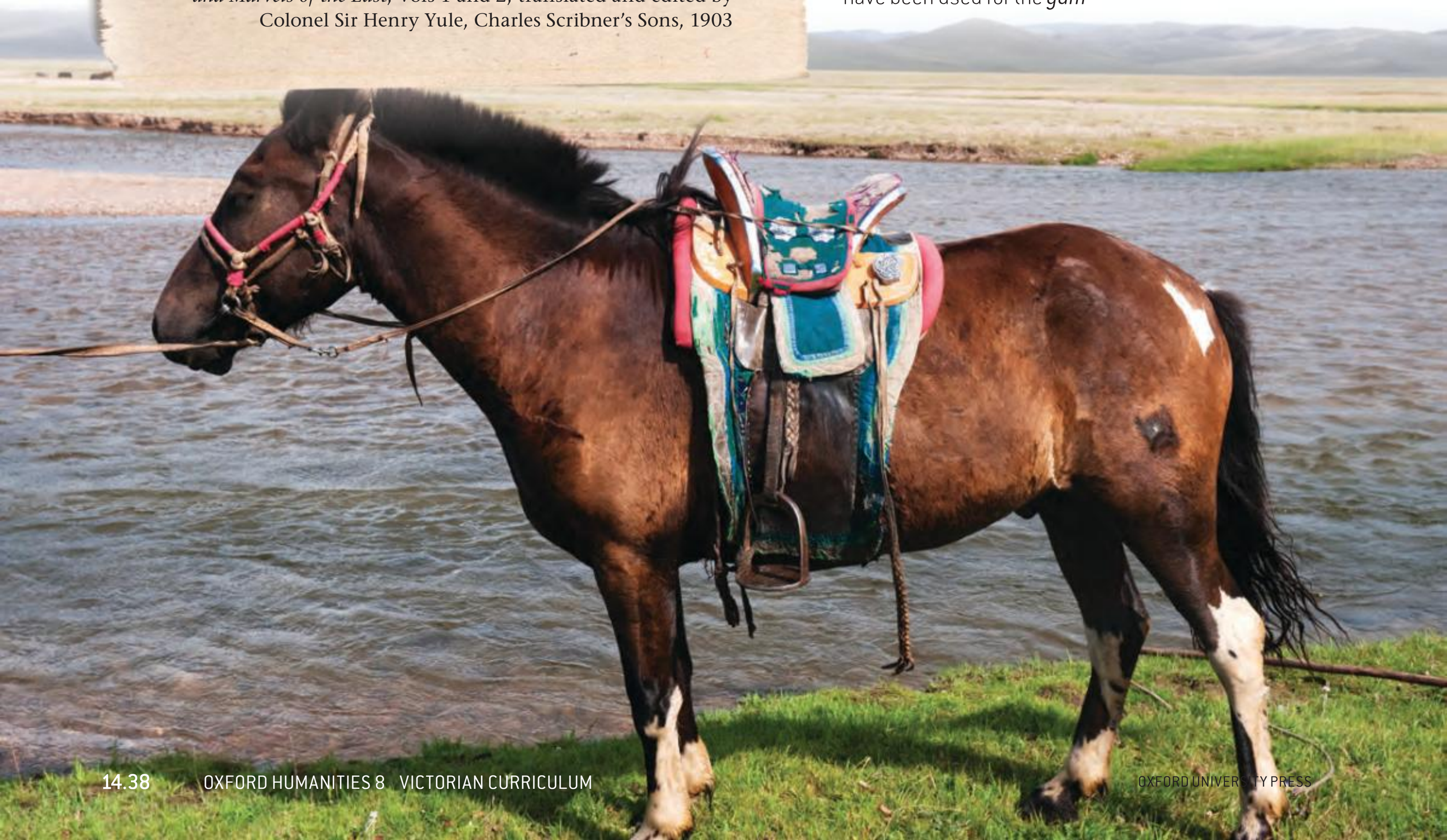
The army was responsible for ensuring the security of the *yam* and its messengers. Over time, the guarded paths of the khan's couriers became commercial routes for travelling merchants, and the staging posts became safe overnight shelters. When the first European ambassadors and merchants travelled to the east to the court of the khan, they reported that unescorted travellers were safer in the Mongol Empire than in any other kingdom on Earth.

Source 4

The traveling messengers of the emperor find at every 25 miles of the journey a station called a 'Horse Post-House'. At each of those stations used by the messengers, there is a large and handsome building for them to stay at, in which they find all the rooms furnished with fine beds and all other necessary articles in silk ... At some of these stations, there are some 400 horses standing ready for the use of the messengers … And this is done on the greatest scale of magnificence that ever was seen. It is a fact that if all these posts are taken together there are more than 300 000 horses kept up specially for the use of the messengers. And the great buildings are over 10 000 in number, all richly furnished.

Extract written by Marco Polo, *c.* thirteenth century, from *The Book of Ser Marco Polo: The Venetian Concerning Kingdoms and Marvels of the East*, Vols 1 and 2, translated and edited by Colonel Sir Henry Yule, Charles Scribner's Sons, 1903

Source 5 A Mongolian horse, like those that would have been used for the *yam*



Naadam – ‘three manly games’

Naadam is a good example of continuity and change in Mongolian culture. Each summer across Mongolia, the festival of Naadam (meaning ‘three manly games’) is celebrated. These ‘three manly games’ are wrestling, archery and horse racing.

The tradition of Naadam started in the thirteenth century, when Genghis Khan used it as a form of celebration at the end of successful military campaigns.

Source 6 An archer competing at Naadam

Warriors returned from battle and, along with feasting, had the opportunity to show off their ‘manly skills’. The festivals were particularly important during the time of expansion, as they helped to train young men.

Since the Mongolian Revolution in 1921, when revolutionaries founded the Mongolian People’s Republic, Naadam has been officially celebrated as a national holiday every year. Teams from all over the country compete for a place at the finals, which are held in Ulan Batar (the capital of Mongolia).

Naadam today follows many historic traditions. Competitors wear traditional costumes to compete in. For example, wrestlers are dressed in leather boots, open-front jackets and briefs, all embroidered with traditional patterns. Archers compete in the traditional Mongolian silk robe. Before each race, child jockeys, aged seven to twelve, gather on horseback to sing folk songs to their horses to encourage them to run well.

For more information on this key concept, refer to page 200 of ‘The history toolkit’.

KEY CONCEPT
Continuity & change

Source 7 A wrestling match at Naadam

14.10 CHECK YOUR LEARNING

Review and understand

1 **Describe** why the *yam* was significant to the Mongol Empire. Did the *yam* contribute to the development or decline of the Mongol Empire?

Apply and analyse

2 **Analyse** Source 4, using the ‘DAMMIT U’ acronym (see page 14.35) to help structure your analysis.

3 Examine Source 2. **Suggest** how each of these laws would have helped secure peace and security in Mongolia.

Evaluate and create

4 In the Mongol Empire, religious leaders (of all faiths) were exempt from taxation and did not have to carry out any public service. Successive khans allowed places of worship to be built for many different religions. Do you think this religious tolerance benefited the Mongolian Empire? **Justify** (give reasons for) your answer.

5 Rank all the developments made to Mongol society during the Mongol Empire, according to their importance in maintaining a strong empire. **Justify** (give reasons for) each ranking.

14.11 The impact of Mongol expansion

In this topic, you will:

- explain the cause and effect of trade across the Mongol Empire on other societies
- explore the significance of conquests and connections made throughout Eurasia.

One significant impact of Mongol expansion was the creation of new dynasties. Genghis Khan and his successors founded dynasties in several other parts of the world. Kublai Khan's Yuan Dynasty in China lasted for a hundred years.

Impact on China

The initial consequences of Mongol expansion on China were negative. Mongols raided Chinese settlements, plundering and murdering as they went. Chinese soldiers were sent off to die in Mongol wars, and citizens had to submit to foreign officials. There were, however, positive impacts of Mongol expansion into China. Perhaps the most positive was the reunification of northern and southern China under the Yuan Dynasty of Kublai Khan, during the 1270s.

The Mongols also brought enriching ideas and technologies from Arabia, western Asia and Mongolia into China. For example, Mongols understood the importance of trade. As such, merchants were held in higher regard than they had been previously in China. Kublai Khan also valued and admired the skills of artisans. Under his rule, they enjoyed a higher social status and their taxes were reduced. The distinctive style of blue-and-white porcelain came from the Yuan Dynasty period.

Source 8 This example of Yuan porcelain is typical of the delicate work produced during the rule of Kublai Khan.

Worksheet
Mongol expansion

Impact on Russia

Between the ninth and thirteenth centuries, there was a region in Eastern Europe known as Rus. It covered western parts of modern-day Russia, Ukraine and Belarus. In numerous raids during the 1230s, the Mongols defeated individual princes of Rus, causing many negative changes in Rus society. But this resulted in a united territory ruled by regional administrators.

After the fall of the Mongol Empire, the rulers in Rus continued to conduct a census every two to three years. This would not be introduced in other parts of Europe for another 120 years. A regular census strengthened the idea of firm and strong central government in Rus. The Mongols' efficient communication system (the *yam*) also continued, and later developed into a postal system.

Rise of Moscow

The rise of Moscow was one of the greatest effects of the Mongols being in Rus. The Moscovite (person from Moscow) princes cooperated with the Mongols, even helping to prevent an uprising against the Mongol army in 1327. As a reward, Moscow was given the right to raise and collect taxes for the khan, which lifted the city's wealth and power. As Mongol rule declined, the power of Moscow grew and spread over neighbouring cities and principalities. About 250 years after Rus was conquered, it was able to overthrow Mongol control. Rus, like China, became a more unified country, with a strong political and administrative centre.

Analyse this!
A painting of a *darugha*

Source 9 A painting of a *darugha* (a Mongol tax collector) in a Russian city, created by Sergey Ivanov (1864–1910)

Impact on Europe

Interaction with the growing Mongol Empire brought Europe out of its isolated view of the world. Travellers such as Marco Polo and William of Rubruck developed an interest in the learning and wealth of the East. The safety of the trade routes established by the Mongols attracted Europeans to build trade and political contacts. Europe's knowledge of the world was greatly increased by the information brought back by ambassadors and merchants.

The development of paper currency came about in Europe because of the influence of the Mongols. Paper money was used by merchants to lighten their load on their long travels along trade routes such as the **Silk Road**.

Silk Road
a network of trade routes stretching west from China to the Mediterranean Sea; it was the main means by which silk was introduced to the West

Impact on trade

The Mongols established, enhanced and protected trade routes stretching from the Chinese coast to the fringes of Europe. They encouraged trade, which helped to spread knowledge in the medieval world.

As their empire expanded, the Mongols developed many trade and political contacts. Trade grew rapidly – particularly due to the tight controls that the Mongols had introduced to create safe and profitable trading routes.

Under the rule of Genghis Khan, all traders were assured of their safety while on the road. Genghis Khan valued them as sources of information from outside the empire. He also used some as diplomats.

Source 10 A copy of a banknote first issued by Kublai Khan in China

MONGOL TRADE ROUTES

Source 11

Source: Oxford University Press

Source 12 An artist's impression of Marco Polo, with his father and uncle, travelling the Silk Road to reach Mongolia; taken from the *Catalan Atlas* of 1375

The Black Death

An unfortunate legacy of the Mongol Empire for the rest of the known world was the spreading of the bubonic plague. Many historians believe that it originated in the Gobi Desert and spread through China, India and then into Europe and the Middle East along the established trade routes of the Mongol Empire. The Black Death was carried by fleas and the rats on which they fed. It severely reduced the populations of all societies with which it came into contact. In Europe alone, about one-third of the population died.

14.11 CHECK YOUR LEARNING

Review and understand

1 **Outline** some of the benefits from Mongol rule in China for the Chinese.

2 **Describe** why Moscow grew in importance under the Mongols.

Apply and analyse

3 Interaction with the growing Mongol Empire brought Europe out of its isolated view of the world. **Explain** why this was the case, using examples.

4 **Explain** how the Mongols influenced the way in which artisans and craftspeople lived in China.

Evaluate and create

5 **Research** the development of paper money. Summarise how the Mongol adoption of paper money in China affected the rest of the world.

6 Research the origins of the Black Death and **create** a flow chart to show the spread of the Black Death. Consider how developments in the Mongol Empire may have contributed to the spread of the Black Death.

14C RICH TASK

Quizlet

Revise the key terms you have learnt so far.

Life in China under Mongol rule

As you have learnt, the Mongols had a big influence on the regions they ruled, and did much more for the countries they conquered than simply plunder and destroy. But what sort of rulers were the Mongols really? What were the positives for those living under Mongol rule and what were the negatives? Much can be learnt about this by looking at Mongol rule in China.

Mongols created their own hierarchy in China, with themselves at the top as the rulers. The hierarchy was as follows:

- First were the Mongols, who held onto their own culture fiercely and took many steps to preserve the rituals and ceremonies of traditional Mongol life.
- Second were other foreigners – mostly Muslims – who were brought to China by the Mongols to help them rule.
- Next were the northern Chinese people.
- Finally, at the very bottom were the southern Chinese people.

Source 13 A Yuan Dynasty watercolour of peasants harvesting rice

Changes in China

The Mongols were tolerant of different religious beliefs, and people were free to practise the religion of their choice. They also loved culture, with textiles and theatre flourishing under their rule.

Under the Chinese, peasants, merchants and artisans all had low status in society. However, the Mongols saw their contributions to society as valuable and gave them a higher status. They also brought in changes to encourage these groups in their enterprises:

- The Mongols encouraged peasants to organise themselves into cooperative rural groups comprising of about 50 households under a village leader. Peasants were also expected to pay a fixed tax rate, which meant that they would know how much of their crops they would have left to live on.
- For merchants, the Mongols increased the availability of paper money and reduced some of the taxes, helping boost trade.
- The Mongols reduced taxes for artisans and made them exempt from any obligations to provide labour.

Despite these improvements, the Chinese were given few rights under the Mongols and were punished harshly if they did not fulfil their obligations to the Mongol rulers. One such obligation was to provide free labour for public works projects, such as building a new capital city in Dadu. Most of this labour was provided by the peasant class, and this was deeply resented by them.

Additionally, many north and south Chinese people who previously held positions of power no longer did so, as Mongols and other foreigners took those responsibilities on instead.

KEY SKILL
Asking questions & conducting research

Using the internet to find relevant, credible and reliable sources

Being able to locate relevant primary and secondary sources using the internet is an important historical skill. However, you need to keep in mind that not all information you find on the internet is necessarily true, accurate, reliable or useful. So, in addition to being able to find material online, you need to be able to evaluate its reliability, credibility and usefulness.

Use the following steps to apply this skill:

Step 1 Identify key words related to your topic and type these into a search engine, such as Google. (Use only these key words; do not type in whole sentences or questions.)

Step 2 Add further relevant key words to refine your search if you cannot find what you want on your first attempts.

Step 3 Look beyond the first page of results. The best results do not always appear first.

Step 4 Assess the reliability of each site by asking yourself the following questions:

- Who is the author or creator? If it is an individual, do they have their credentials listed (for example, a degree or a title)? If it is an organisation, is it a reputable organisation, such as a government or university department?
- What is the purpose of the website? Is it trying to inform, persuade or sell?
- Is the site objective? Is the author's point of view biased?
- Is the information accurate? Can the information be verified if you cross-check it with other sources of information?
- Does the site contain spelling mistakes or grammatical errors? (If so, this is usually an indication that the site is not particularly reliable.)
- Is the information current? Can you find evidence of recent updates?

For more information on this key skill, refer to page 203 of 'The history toolkit'.

Practise the skill

1 Conduct internet **research** to find relevant, credible and reliable source material about Mongol rule in Yuan China using the steps outlined above.

2 From the credible sources you have found, prepare a table like the one below and **outline** the pros (positives) and cons (negatives) of living under Mongol rule in Yuan China. Remember to record the URLs of the sites you have found in the fourth column of the table.

Positives and negatives of Mongol rule in China

Pros	Cons	Neither positive or negative	Information source

Extend your understanding

1 From the information you have gathered in this exercise, **evaluate** the pros and cons of Mongol rule and give your opinion on whether Mongol rule was positive or negative for China overall. Write a short essay explaining your response. Use the TEEL paragraph structure on page 219 of 'The history toolkit' to help you structure your essay.

14 CHAPTER REVIEW

Review questions

14A How was Mongol society organised?

1 **Describe** the features of a yurt. (2 marks)

2 **Outline** how one aspect of daily life in Mongolia strengthened Mongol warrior culture. (2 marks)

3 **Discuss** the various features of the Mongol army that made it so strong. In your opinion, which feature was the most influential? (6 marks)

(Total: 10 marks)

14B Why did the Mongols expand their territory?

1 **Explain** how the Mongol Empire expanded under Ogodei Khan. (3 marks)

2 **Summarise** how Kublai Khan governed China. (3 marks)

3 **Apply** the concept of cause and effect to discuss the expansion of the Mongol Empire under Genghis Khan. (4 marks)

(Total: 10 marks)

14C What were the consequences of Mongol expansion?

1 **Define** the term *yam*. (1 mark)

2 **Summarise** the role of a *darugha* and why they were important. (3 marks)

3 'Globalisation' is a concept describing how the world is becoming more interconnected. Using specific examples from this chapter, **propose** two ways the Mongols helped to globalise the world in the thirteenth century. (6 marks)

(Total: 10 marks)

Review activity

Examine Sources 14 and 15 and answer the questions that follow.

The life of an emperor

Source 14

Whenever the Great Khan [Kublai Khan] sits at the table on any great court occasion, his table is elevated a good deal above the others. Outside the hall are more than 40 000 people; for there is always a great crowd of folk bringing presents to the Lord …

On the buffet are placed all the Lord's drinking vessels, among which are certain pitchers [jugs] of the finest gold, which are big enough to hold drink for eight or ten persons. In fact, the Great Khan has such a quantity of this kind of plate, and of gold and silver in other shapes, as no one ever before saw or heard tell of, or could believe.

Those who wait upon the Great Khan with his dishes and his drink are some of the great barons. They have the mouth and nose muffled with fine napkins of silk and gold … And when the emperor is going to drink, all the musical instruments, of which he has vast stores of every kind, begin to play. When he takes the cup, all the barons and the rest of the company drop on their knees and make the deepest bow before him. Then the emperor drinks. Each time he does so the whole ceremony is repeated.

When all have dined and the tables have been removed, then come in a great number of jugglers and players, skilled at every sort of wonderful feat … so that everybody is full of laughter and enjoyment.

Extract written by Marco Polo, *c.* thirteenth century, from *The Book of Ser Marco Polo: The Venetian Concerning Kingdoms and Marvels of the East*, Vols 1 and 2, translated and edited by Colonel Sir Henry Yule, Charles Scribner's Sons, 1903

Source 15 A manuscript illustration of Kublai Khan and the Polo brothers on a hunting expedition, *c.* fifteenth century

1 Source 14 provides a strong example of one of the five historical concepts (chronology, continuity and change, significance, cause and effect, evidence). **Identify** which historical concept is strongly demonstrated in this source, and **outline** why you have chosen this concept. (2 marks)

2 Based on the information gathered from this source, **describe** the atmosphere of the feast. (2 marks)

3 **Describe** what is happening in the scene shown in Source 15. (2 marks)

4 How useful are Sources 14 and 15 in portraying life in the Mongol Empire? Do you think these sources are accurate? For each source, **justify** (give reasons for) your answer. (12 marks)

5 For each source, **identify** a feature that highlights the status of Kublai Khan as an emperor. (2 marks)

(Total: 20 marks)

Check your Student obook pro for these digital resources and more:

Student book questions
Chapter 14

Key skill worksheet
Communicating & reflecting: Chapter 14

Quizlet
Play a game of Quizlet on Mongol expansion.

Chapter review quiz
Chapter 14

CHAPTER 15

Japan under the shoguns

Japan first became united as a country under an emperor at the end of the sixth century CE. Ever since then, Japan has been ruled by a long line of emperors. However, for almost 700 years – from 1185 to 1868 – the emperor of Japan had no real power. Instead, Japan was controlled by a series of military leaders, known as shoguns. The word 'shogun' comes from the Japanese *sho* (meaning 'commander') and *gun* (meaning 'troops').

In 1868, the last shogun was overthrown and power was returned to the emperor. At this time, the capital was moved from Heian-Kyo (modern-day Kyoto) to a new location in Edo – now known as Tokyo.

Source 1 Toshogu Shrine in Nikko, Japan, is the burial place of Tokugawa Ieyasu. He was the founder and first shogun of the Tokugawa shogunate, which ruled Japan from 1603 to 1868.

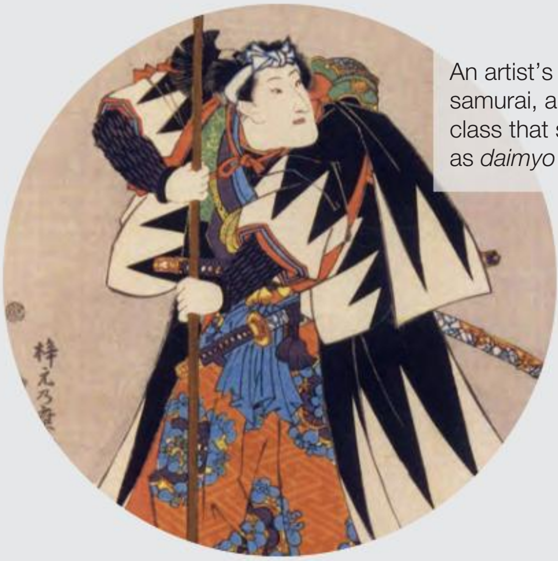
15A
What led to the rise of the shoguns?

15B
How was Japanese society organised during the rule of the shoguns?

15C
How did Japan change during the rule of the shoguns?

15.1 Japan under the shoguns: A timeline

Source 1 A timeline of some key events and developments in Japan under the shoguns



An artist's impression of a samurai, a member of a warrior class that served lords known as *daimyo*

700 CE | 800 | 1100 | 1200 | 1300 | 1400

Nara period 710–794

Heian period 794–1185

Kamakura period 1185–1333

710
The first official capital of Japan is based in the city of Nara; the imperial family – led by a series of emperors or empresses – rules over Japan during this time.

794
Under orders from Emperor Kammu, the capital of Japan moves to the city of Heian-Kyo (modern-day Kyoto). It remains the official capital of Japan for the next 1000 years.

1185
The Minamoto clan seizes power from the emperor. Minamoto no Yoritomo becomes shogun and establishes his own capital city in Kamakura. With support from *daimyo* (lords) and samurai (warriors), a series of shoguns rules Japan for the next 700 years.

1274
The Mongol army launches an attack on Japan, landing on the island of Kyushu. A typhoon destroys many of their ships and the invasion fails.

1281
The Mongol army launches a second attack on Japan, landing once again on the island of Kyushu. For the second time a typhoon hits, destroying almost all Mongol ships, and the invasion fails.

1333
Emperor Go-Daigo overthrows the Kamakura shogunate and takes back power from the shogun for a brief period.

1336
Ashikaga Takauji seizes power from Emperor Go-Daigo to become the new shogun.

An artist's impression of Japanese fighters facing the Mongol army during the attempted invasion of Japan

Heijo Palace in the city of Nara was the Imperial Palace, and seat of power from 710 to 784.

Sequence this!
Events in Japan under the shoguns

A statue of Tokugawa Ieyasu, founder of the Tokugawa shogunate

1467
A period of civil war, known as the Warring States period, begins in Japan between rival warlords. It lasts for around 100 years.

1598
William Adams, a sailor and navigator, becomes the first Englishman to visit Japan. He befriends Tokugawa Ieyasu (a future shogun) and later becomes a key adviser to him.

1603
Tokugawa Ieyasu becomes shogun and establishes a base in the city of Edo (modern-day Tokyo). The Tokugawa shogunate rules Japan for the next 260 years.

1633
Tokugawa Iemitsu introduces a policy known as *sakoku* (meaning 'locked country'). Under the policy, no Japanese people are permitted to leave Japan and no foreigners are allowed to enter. The policy remains in effect until around 1853.

1853
Commodore Matthew Perry, a US naval officer, arrives in the city of Edo (modern-day Tokyo) to persuade the Japanese to open their borders to trade.

1868
The last shogun, Tokugawa Yoshinobu, steps down and hands power back to the imperial family under Emperor Meiji.

1500 | 1600 | 1700 | 1800 | 1900

Muromachi period
1336–1573

Azuchi-Momoyama period
1573–1603

Tokugawa (or Edo) period
1603–1868

1666
A policy is introduced to reduce logging and increase the planting of trees. Only the shogun and his *daimyo* are able to authorise the use of wood.

1724
Timber harvesting in Japan has now been reduced by 60 per cent. It remains at low levels for the next 30 years, allowing Japan's forests to recover.

1854
The Convention of Kanagawa puts an end to the policy of *sakoku*. Japan opens up trade with the United States.

15.1 CHECK YOUR LEARNING

Review and understand

1 **Identify** the year the city of Heian-Kyo became the capital of Japan. What name is this city known by today?

2 **Identify** how many times the Mongol army attempted to invade Japan. **Outline** if these attempts were successful.

Apply and analyse

3 a **Explain** the policy of *sakoku*.

b Use the dates provided on the timeline to **calculate** how many years this policy was in place.

Evaluate and create

4 The timeline shows that the shoguns ruled Japan from around 1185 to 1868 CE. Many historians break this overall period into four further periods, commonly known as:

- the Kamakura period
- the Muromachi period
- the Azuchi-Momoyama period
- the Tokugawa (or Edo) period.

a Using the internet, **research** why each of these periods was given its name.

b For each period, generate two inquiry questions that you would like to find the answers to. As you work your way through this chapter, check back on these questions and provide the answers to them when you can.

15.2 Life before the shoguns

In this topic, you will:

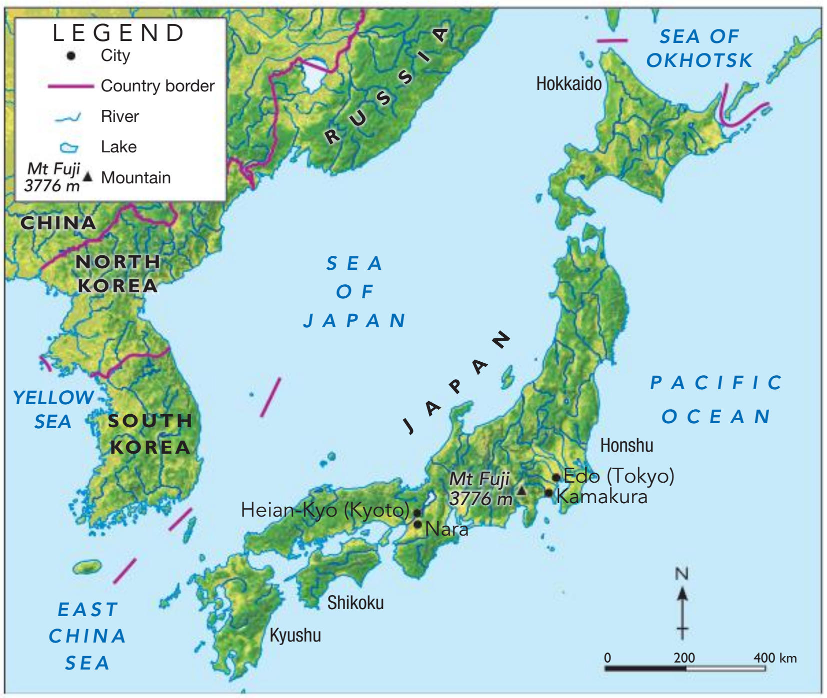
» explore how the environment influenced early life in Japan.

Archaeologists believe that Japan was initially settled by humans around 30 000 years ago. Over time, groups of settlers from the nearby mainland (particularly China and Korea) continued to arrive in Japan. The fact that Japan is made up of many islands, and that each island is very mountainous, meant that different groups of settlers formed isolated communities. Over time, these communities developed extremely diverse customs and traditions.

The influence of geography

Japan is a chain of islands in the Pacific Ocean formed by the peaks of underwater mountain ranges. More than 3000 islands are part of Japan today, but people have mostly always lived on the four largest. These are Honshu, Shikoku, Kyushu and Hokkaido (see Source 2).

JAPAN: PHYSICAL



Source 2

Source: Oxford University Press

Japan's rugged landscape means that only 15 per cent of the land can be farmed effectively. As a result, people tended to settle in the valleys and coastal regions that are flatter, and more suited to agriculture. The lack of suitable farming areas means there has always been fierce competition between people for fertile land. Commonly grown crops were soya beans, wheat, barley and millet (a type of cereal grain), and these formed the basis of the traditional Japanese diet. Rice was also grown, but this was mostly eaten by the wealthy.

Japan is situated in an area of high volcanic and earthquake activity. It is also subject to regular tsunamis as a result of earthquakes.

The difficulty of living and farming in the mountains encouraged many people to earn their livelihoods from the ocean. Early settlers fished from coastal villages and, to this day, seafood remains an important part of the Japanese diet.

The sea surrounding Japan separated its people from the rest of Asia and, as a result, Japan developed its own unique religion, arts and social structures.

Key skill worksheet
Asking questions & conducting research: Earliest settlers in Japan

The earliest settlers

Archaeological evidence suggests that people travelled to the Japanese islands around 30 000 BCE. A second group of settlers followed in around 14 000 BCE.

Historians refer to these early people as *Jomon* (which translates roughly as 'cord patterned') because of the distinctive pottery with rope-like patterns that archaeologists have discovered from this era. Other artefacts – including tools, weapons and figurines – suggest that there were settled communities in the north of Japan at this time.

The clan system

Over time, small, independent societies and states formed on the islands of Japan. Each of these states was made up of different **clans** – groups of families related by blood or marriage. Each clan honoured a range of different gods. Some were spirits of the trees, winds, rivers and mountains, while others were spirits of dead ancestors of clan members.

Each clan was led by a group of warrior chiefs, who protected the people in return for a share of the crops that were harvested each year. Local wars between rival clans broke out regularly, as they fought one another over access to resources such as fertile land.

clans
groups of people linked and united in their aims and behaviours by the knowledge (or a belief) that they share common ancestors

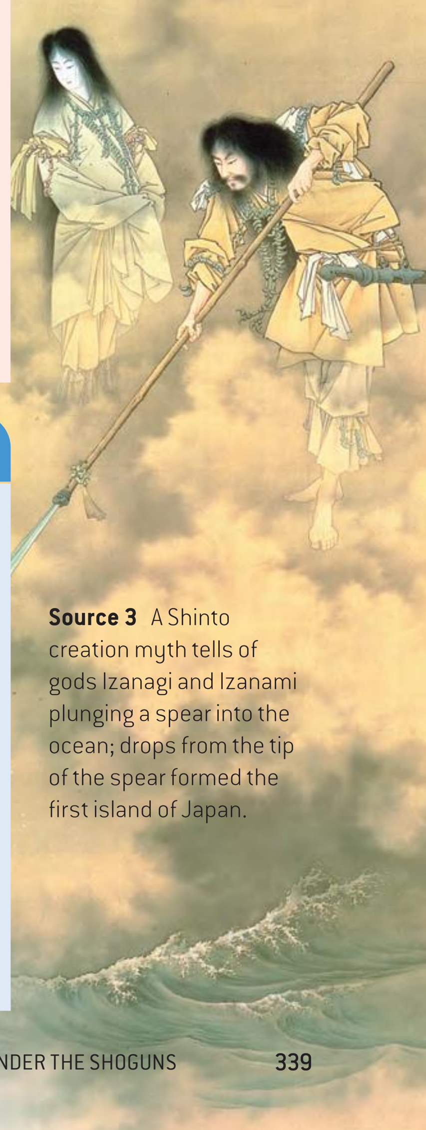
Shinto creation myth

Shinto is the oldest religion in Japan and has played a significant role in the way Japanese society has evolved. According to a Shinto creation myth, in the beginning there were two gods – Izanagi and his wife, Izanami – who were asked by the spirits to create a new land. They were given a spear, which they plunged into the ocean. As they pulled the spear from the ocean, drops fell from the tip, forming the first Japanese island. Izanagi and Izanami settled on this first island and gave birth to all of the islands that now form Japan. They also gave birth to a range of different gods to inhabit each of these islands.

While giving birth to the god of fire, Izanami died. Izanagi followed her to the Land of the Dead to bring her back, but she refused. He returned alone, but in doing so he brought many impurities back to Earth with him. These impurities cause human wrongdoing and suffering.

For more information on this key concept, refer to page 201 of 'The history toolkit'.

KEY CONCEPT
Significance



Source 3 A Shinto creation myth tells of gods Izanagi and Izanami plunging a spear into the ocean; drops from the tip of the spear formed the first island of Japan.

15.2 CHECK YOUR LEARNING

Review and understand

1 **Identify** the body of water that separates Japan from the mainland.

2 **Identify** the name that historians have given to the first people to settle in Japan. Why are they called this?

Apply and analyse

3 **Explain** how the location of Japan affected the way societies there developed.

4 **Analyse** the impact of Japan's geographical features on the development of society there. Remember, when you analyse something, you must break it down into smaller parts and explain how they relate to each other.

Evaluate and create

5 **Create** a facts chart on what you have learnt in this section about the early settlement of Japan.

6 Draw a simple comic strip (using stick figures) to retell the Shinto creation myth of Izanagi and Izanami.

15.3 The rise of the emperor

In this topic, you will:

» understand the changing political role of the emperor in Japan.

In the fifth century CE, one Japanese clan, known as the Yamato clan, became more powerful than all others. Under the rule of this clan, the organisation of Japanese society began to take shape. A type of centralised government was formed and a system of taxation was introduced, but the most significant change was the appointment of an **emperor** – a supreme ruler who was believed to communicate with the gods and possess magical powers.

emperor
someone who rules an empire; an empire is a group of countries or areas often speaking different languages and having different cultures, but centrally ruled

The Yamato rulers

The Yamato clan grew to control much of southern Japan from their territorial base on the central island of Honshu. They developed great military forces in order to protect this territory. While other clans across Japan still technically controlled their own territories, the leaders of these clans promised their loyalty to the Yamato chief, because they knew they could never defeat him in battle.

The Yamato chief's territory was divided into a series of provinces that were controlled by junior clan chiefs. Each of these chiefs ensured that the supreme leader was obeyed and that taxes were collected.

Even though Japan was ruled by a series of clan leaders, a system developed that recognised one Yamato chief as the supreme leader. From around the seventh century CE onwards, this leader eventually became known as emperor. The emperor was regarded as the spiritual and symbolic head of the country, and claimed to be descended from the Shinto sun goddess Amaterasu. Clan chiefs across Japan were required to show their respect to the emperor by acknowledging his superiority and making payments to him to show their loyalty.

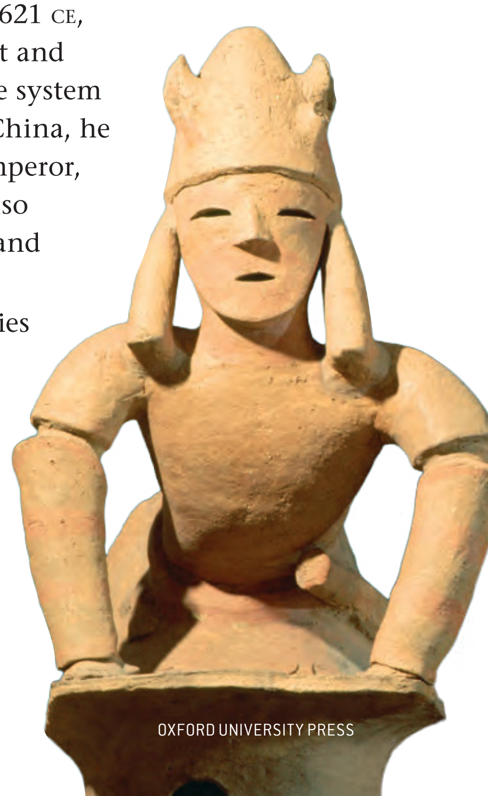
Key skill worksheet
Determining historical significance: The Yamato clan

A centralised government

Prince Shotoku, a Yamato prince who ruled from 593 to 621 CE, was a key figure in establishing a centralised government and strengthening the control of the Yamato clan. Basing the system of government on that of the neighbouring country of China, he created a new **constitution** that gave all power to the emperor, who had to be obeyed by all Japanese people. Shotoku also established a large bureaucracy with 12 different ranks, and introduced Buddhism and Confucianism to Japan.

constitution
the political principles on which a country or society is based and that guide its government; also, a written document that outlines these principles

After him, in 646 CE, Emperor Kotoku introduced a series of reforms that further strengthened the centralised government. From then on, all land in Japan was said to belong to the emperor. Peasants were made to pay taxes to the emperor either in goods (such as rice or cloth) or in labour (by working on building sites or



Source 4 A fired clay statue from the burial mound of a junior Yamato chief; it was made in the mid-sixth century BCE.

The emperor's ancestry

Yamato chiefs claimed that they were descended from the sun goddess Amaterasu, and therefore had a right to rule Japan. Japanese legend states that a Yamato leader named Jimmu was the grandson of Amaterasu and the first emperor of Japan – even though the word 'emperor' was not used in Japanese until a thousand years after he was supposed to have lived. Jimmu is thought to have united a series of clans under his reign from 660 to 585 BCE.

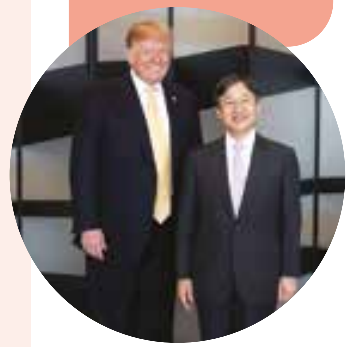
Some historians think that Jimmu is a mix of characters, both real and imagined, while others question whether or not he ever existed. Regardless of whether Emperor Jimmu is fact or fiction, his name is listed on the official family tree of the current ruling family of Japan, which traces its ancestry back to him.

The 13 emperors who came after Jimmu are known as 'legendary emperors', because their existence is also based on legend rather than solid historical evidence. The earliest recorded history in Japan begins after that, in about 300 CE.

Naruhito is the 126th Japanese emperor. He succeeded Emperor Akihito in 2019.

For more information on this key concept, refer to page 201 of 'The history toolkit'.

KEY CONCEPT
Evidence



Source 5 Former US President Donald Trump with Emperor Naruhito in Tokyo in 2019.

serving as soldiers). To administer this system of taxation, the country was divided into provinces, each overseen by a governor appointed by the emperor.

In 710 CE, the city of Nara was established as the first official capital of Japan and the emperor's palace was built there. From here, the new centralised government ruled Japan.

The Heian period (794–1185 CE)

In 794 CE, Emperor Kammu moved the capital from Nara to a new city he had constructed called Heian-Kyo (modern-day Kyoto): see Source 7 on the following page. Heian-Kyo remained the official capital of Japan for the next 1000 years. This move marked the start of a period in Japanese history known as the Heian period (794–1185 CE). The Heian period became known for Japanese arts and culture; but it was also at this time that the emperor began to lose control, and the eighth century CE marks the beginning of the feudal period of Japan, when society was organised in a system called **feudalism**.

The Imperial Court

Although he was considered the supreme ruler of Japan, the emperor did not involve himself in the day-to-day running of his country. Special advisers and ministers were appointed to carry out these functions. The emperor was removed from his people, living in a beautiful isolated palace known as the Imperial Court. It was a place of luxury and privilege for a select few. The reality of life outside the palace did not intrude.

During the Heian period, the Imperial Court was dedicated to fine arts and learning, both of which flourished. Music and writing were encouraged, and poetry was a central part of life at court. Both men and women were encouraged to write. Women at court dressed in elegant **kimonos**, made from silk and often composed of up to 16 layers. Although men wore robes with fewer layers, they were still required to dress elegantly and according to tradition.

feudalism
a set of legal and military customs that served to organise the society of medieval Europe and Japan; under feudalism, a lord (in Japan, a *daimyo*) gave a fief (parcel of land) to a person (called a vassal) in exchange for service and loyalty

kimonos
long, loose Japanese robes with wide sleeves worn as an outer garment; they have a wide belt and are often elaborately decorated; 'kimono' means 'thing to wear'

Men who belonged to the court had little contact with the outside world unless they were appointed as the governor of a province; and at court, it was generally considered more important that a man be a good poet than a good administrator.

The court was often entertained with poetry or music contests, or through scrolls of picture stories. Physical activities included archery and *kemari* – a traditional game in which players kicked a leather ball to each other without letting it touch the ground.

Source 6 A portrait of a typical woman at the Imperial Court during the Heian period

The emperor's power weakens

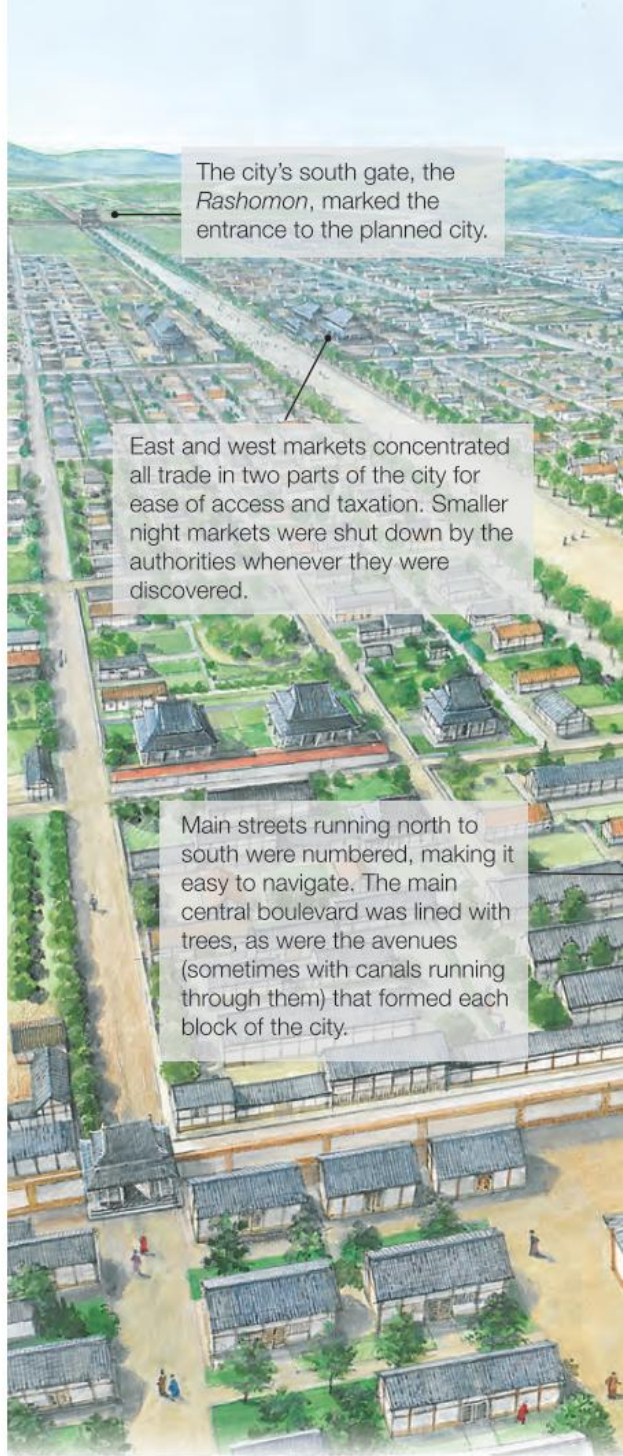
After the death of Emperor Kammu in 806 CE, a series of weaker emperors ruled over Japan. Their reigns resulted in the central government becoming increasingly removed from the daily governing of the provinces.

Outside the city of Heian-Kyo, the emperor's power and control grew weaker. Lords who had been granted permission by the emperor to own and administer large rural estates – called *shoen* – became more and more powerful. Originally, *shoen* were plots of land given to Buddhist monks to grow rice crops on, without paying tax to the emperor. Later on, emperors began granting *shoen* to nobles and officials as a reward for loyal service. Over time, the noble families who owned the *shoen* became increasingly wealthy and powerful, because they not only controlled the land (which was still tax free), but also collected taxes from the peasants living on it.

These noble families built up their own private armies in order to protect and police their *shoen*. The armies were led by generals known as **shoguns** and were made up of warriors called **samurai**. Eventually, the emperor began to depend on these private armies for support. This process marked the beginning of shogun rule in Japan.

shoguns
chief military commanders of Japan between the twelfth and nineteenth centuries; shoguns dictated how the country would be ruled; their positions became hereditary during the Ieyasu shogunate

samurai
a Japanese medieval warrior; the word 'samurai' means 'one who serves'



Source 7 The city of Heian-Kyo was built as the new capital of Japan by Emperor Kammu.

The city of Heian-Kyo

Heian-Kyo was a planned city (see Source 7), established in 794 CE by Emperor Kammu. It went on to serve as the official capital of Japan for the next 1000 years. Today it is known as Kyoto.

15.3 CHECK YOUR LEARNING

Review and understand

1 **Describe** the role of the Yamato supreme leader, and how people showed him their loyalty.

2 **Identify** the Japanese rulers mentioned in this topic and list them in chronological order.

Apply and analyse

3 **Explain** how the Yamato clan changed the way Japanese society was organised.

4 **Summarise** why historians contest the existence of Emperor Jimmu.

5 a In your own words, **define** a *shoen*.

b **Explain** how the system of granting *shoen* to nobles eventually weakened the power of the emperor.

6 **Examine** Source 7.

a **List** three activities that took place in the Imperial Palace.

b **Identify** where the nobles lived.

Evaluate and create

7 Prince Shotoku was a key figure in establishing a centralised government. Using the 5Rs (see page 212 of 'The history toolkit'), **evaluate** Shotoku's significance.

8 **Create** a flowchart showing how the death of Emperor Kammu led to the rise of the shoguns.

15A RICH TASK

Quizlet
Revise the key terms you have learnt so far.

Religious beliefs

Religion has long been an important part of life for Japanese people, and has had significant influence on the social and political structures of Japan.

Shinto is the oldest religion in Japan and was a part of early clan life. During the rule of the emperors, Buddhism and Confucianism were also introduced to Japanese society from neighbouring China. Prince Shotoku was a keen follower of Buddhism, and had many Buddhist temples built throughout Japan during his rule. As a result, Buddhism quickly became the religion of the ruling class. Today, Shinto and Buddhism are still the most significant belief systems in Japan.

Source 8 The Japanese garden at Melbourne Zoo

KEY SKILL
Asking questions & conducting research

Summarising your research

In history, you will often be asked to research a topic and summarise your findings. A summary is a short overview of key points that you gather from your research. By researching, you might look closely at sources, visit the library or search on the internet.

It can be difficult to work out which parts of your research are relevant or important. A good way to do this is to identify two or three key themes that each source has in common.

Follow the steps below when summarising important information from written sources:

Step 1 Conduct research on your topic. Make sure you look for a range of sources written by a variety of different people. This will help you avoid bias.

Step 2 Begin by reading one source. At this stage, do not annotate or highlight it – just read it from start to finish to make sure you understand what is being said.

Step 3 Read the text again. In the margin, highlight and annotate some of the key themes that are being communicated by the writer.

Step 4 Repeat steps 2 and 3 for each of the sources you have found in your research. Look for similar themes to those you found in the first source.

Step 5 From your annotations, pick the most important points that are required for the reader to gain a clear understanding of the topic you are researching.

Step 6 Write your summary. Use your own words to briefly outline the overall argument. Set yourself a word limit before writing your summary, and aim to stick to it.

For more information on this key skill, see page 203 of 'The history toolkit'.

Source 9 This text describes Shinto, one of the three different religions worshipped in feudal Japan. Some highlights and annotations are included to help guide you through step 3 of the process.

The roots of Japan's traditional Shinto religion (meaning 'the way of the gods') were laid down thousands of years ago. Followers of Shinto believe in a number of different gods and sacred ancestor spirits known as *kami*. Like many other ancient peoples, the early Japanese believed that all natural things were alive. *Kami* took the form of things and concepts important to life, such as the sun, hills, lakes, mountains, rivers, trees and fertility. The sun goddess, Amaterasu, was considered Shinto's most important *kami*. According to Shinto, people are also believed to become *kami* after they die. They are then worshipped by their families.

Shinto is a belief system that has a positive, uplifting view of life on Earth. People are considered to be basically good. Evil spirits are seen to be responsible for the bad things that happen. Consequently, many Shinto rituals are aimed at warding off evil spirits through purification, prayers and offerings to *kami*. Shrines for worshipping *kami* are found across Japan, and in some homes, small family altars hold offerings of *sake* (rice wine) and food.

Key theme: Origins and structure

Key theme: Beliefs

Key theme: Worship and ritual

Practise the skill

1 Follow the steps in the key skill box to **summarise** how Shinto religion was observed in feudal Japan. Try to keep to a limit of 100 words. Make sure you write the summary in your own words.

2 Share your summary with a partner and **discuss** the similarities and/or differences in what you both felt were the important points.

3 Log onto your obook pro. Two more sources are available for you to practise **summarising:** one on Confucianism and one on Buddhism. Follow steps 1 to 6 for each source.

Extend your understanding

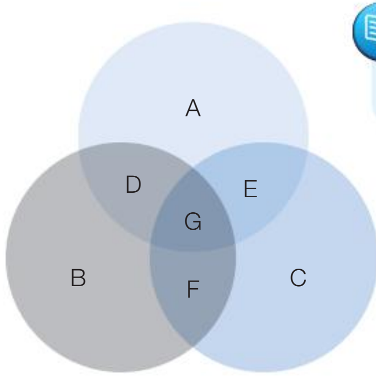
1 **Create** a Venn diagram with three circles (see Source 10) to compare the similarities and differences between the three belief systems of feudal Japan: Shinto, Buddhism and Confucianism.

2 **Research** the idea of Zen and how it has influenced the development of Japanese garden and interior design.

a Find an image of a Zen garden or a Zen room. Annotate the Zen features that make it a calm place to meditate.

b Design your own Zen garden or room. Perhaps you could design a Zen classroom!

Worksheet
Printable sources on Confucianism and Buddhism



Source 10 A Venn diagram comparing three things

15.4 The shogunates

In this topic, you will:

- » understand the changing political leadership in Japan under the shoguns
- » outline the developments made by various shoguns.

Key skill worksheet
Sequencing events: The rulers of Japan during the Shogunate era

As the power of the emperor and the Imperial Court began to weaken, the heads of Japan's noble families became increasingly powerful people. Because they were able to tax the peasants working on their *shoen* and sell the crops the peasants grew without paying tax to the emperor (see page 342), they also became extremely wealthy.

The emergence of a warrior class

Until the end of the twelfth century, Japan was ruled by the emperor and his government from the Imperial Palace in Kyoto. The decisions made by the emperor were very heavily influenced by members of the Fujiwara clan (who were trusted advisers at court). However, the emperor's government focused almost completely on life and affairs in the capital, and failed to pay attention to the rural provinces. Because of this, from about the tenth century onwards, a new warrior class emerged to provide order and control in the provinces that the emperor had neglected.

By the middle of the twelfth century, two powerful clans controlled most of Japan: the Taira and the Minamoto. These clans became particularly influential through supporting factions (interest groups) at the emperor's court. In addition to this, they controlled large armies of samurai. Over the next 25 years, the Taira and Minamoto clans fought for control over Heian-Kyo and the emperor. By 1185, the Minamoto clan had captured Kyoto and defeated the Taira.

After the defeat, the leader of the Minamoto clan, Minamoto no Yoritomo, allowed the emperor to retain his title, but stripped him of any authority to rule over the people of Japan. Japan was now to be ruled by a military dictator known as a shogun, and the government formed under the ruling family was called the **shogunate**. This event marked the beginning of about 700 years of shogun rule in Japan (see Source 1).

shogunate
the government controlled by the shogun

Source 1 The rulers of Japan during the Shogunate era

Ruling family	Time	Capital city	Period
Kamakura shogunate	1185 (officially recognised 1192) to 1333	Kamakura	Kamakura
Imperial family (the emperor briefly regains power)	1333 to 1336	Kyoto	Kemmu restoration
Ashikaga shogunate	1336 to 1573	Kyoto	Muromachi
Shogun Nobunaga	1573 to 1582	Azuchi	Azuchi–Momoyama
Shogun Hideyoshi	1582 to 1598	Kyoto	Azuchi–Momoyama
Tokugawa shogunate	1603 to 1868	Edo (Tokyo)	Tokugawa (or Edo)

Note: The Azuchi–Momoyama period takes its name from a combination of castle names: Azuchi Castle (Nobunaga's base) and Momoyama Castle (Hideyoshi's base).

daimyo
a feudal lord of Japan who was a large landowner, and offered his loyalty and service to the shogun

seppuku
a form of ritual suicide common among Japanese samurai who felt they had been dishonoured; this involved self-disembowelling (cutting open the belly)

MINAMOTO NO YORITOMO

I am Minamoto no Yoritomo. In 1185, I formed a military government in Kamakura. People thought it was temporary, but when the emperor died in 1192, I forced the Imperial Court to recognise my position as Seii Tai-shogun ('Barbarian-subduing great general'). I ruled on the emperor's behalf, and all nobles had to obey me.

I introduced a feudal system across Japan and appointed my key supporters as military governors of the provinces. These *daimyo* were granted land and were responsible for collecting taxes in their region. They, in turn, gave parts of this land to their samurai in return for their military support.

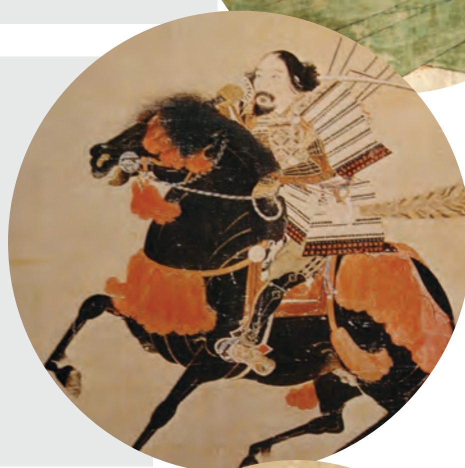
EMPEROR GO-DAIGO

In 1333, I, Emperor Go-Daigo, was able to gain the support of discontented samurai who felt their elders had not been rewarded properly for their service in defeating the Mongols. They overthrew the Kamakura shogunate, promising loyalty to me. Unfortunately my power was short-lived as Ashikaga Takauji, a once loyal general, seized power for himself.

ASHIKAGA TAKAUJI

I, Ashikaga Takauji, moved the capital back to Kyoto and built a new palace in the Muromachi district. Hence, this time is referred to as the 'Muromachi period'. There was a focus on the arts and theatre, and boosting the adoption of Zen Buddhism.

I expanded the authority of the *daimyo*. They now had responsibility for military decisions, policing, the law, and economic and taxation matters. At first, this decision increased the power of the Ashikaga shogunate, mainly because it had a number of strong leaders in charge. However, as weaker shoguns came to power, the Ashikaga shogunate lost control. For the next few decades, from 1467 to 1573, Japan fell into a permanent state of civil war called the 'Warring States period'. My shogunate's power diminished.



ODA NOBUNAGA

In 1573, after a century of civil war across Japan, it took a warrior like myself, Oda Nobunaga, to control Kyoto and become the new shogun. Ruling until 1582, I centralised political power in Kyoto again and removed any disloyal *daimyo*.

A military man, I reorganised the army into separate divisions of cavalry and foot soldiers, and equipped them all with guns. My army proved to be an undefeatable force against more traditional samurai armies, bringing one-third of Japan under my control. I committed *seppuku* in 1582, on the verge of defeat, after one of my generals rebelled against me.

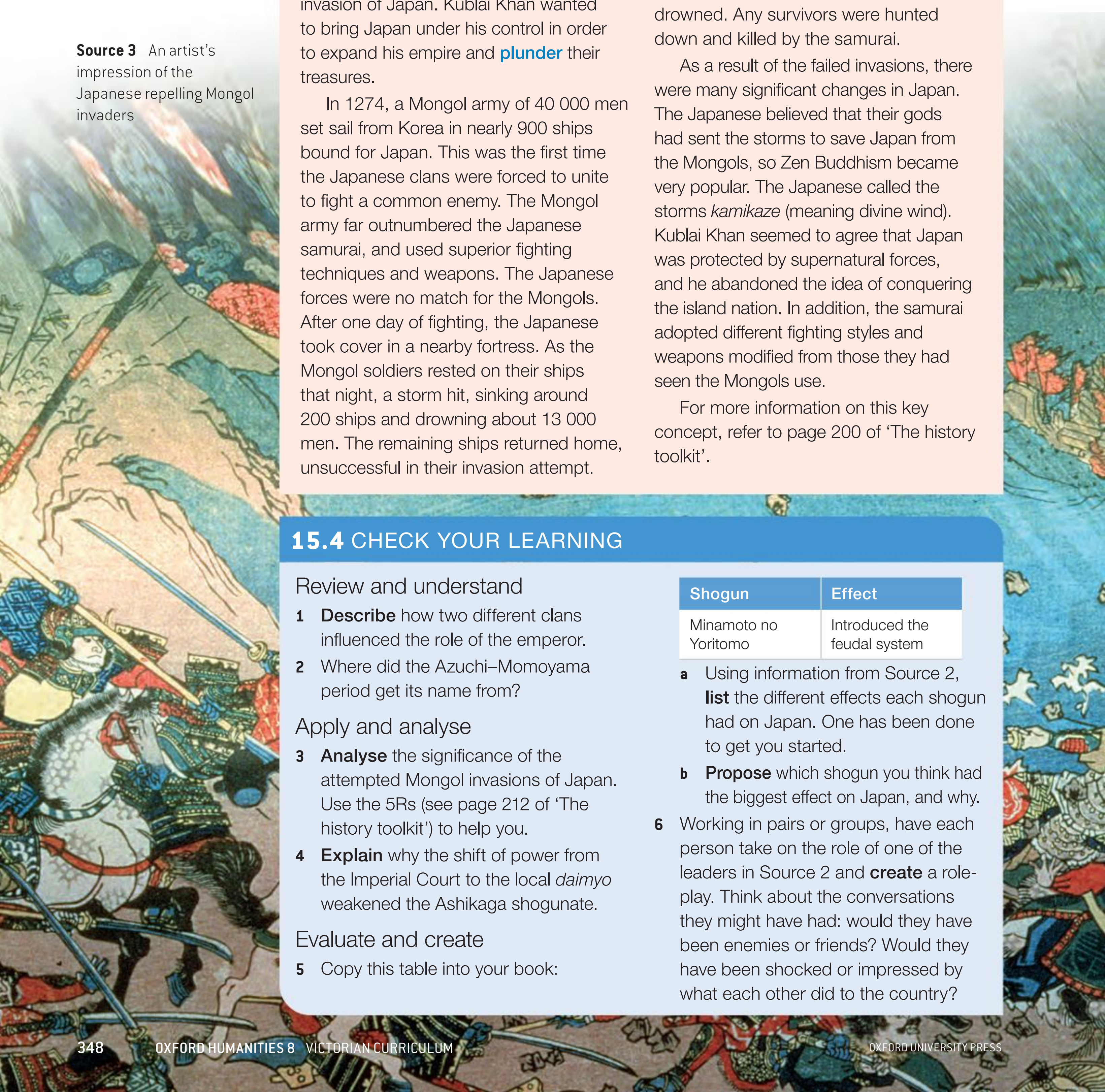
TOYOTOMI HIDEYOSHI

I am Toyotomi Hideyoshi. In 1582 I became the new shogun and continued the process of reunification in Japan, gaining control of the islands Shikoku and Kyushu. Despite being the son of a peasant, I was a great believer in a strict class system, and forbade farmers from carrying swords and samurai from engaging in trade. I was killed in 1603 during a failed invasion of Korea.

Source 2 Some of the key shoguns and leaders during the Shogunate era

KEY CONCEPT
Cause & effect

plunder
to steal, often using violent force



Source 3 An artist's impression of the Japanese repelling Mongol invaders

Mongol invasions of Japan

One of the most significant events during the Kamakura shogunate was Kublai Khan's attempted conquest of Japan. Having already conquered China and Korea, the Mongol leader Kublai Khan (grandson of Genghis Khan) planned an invasion of Japan. Kublai Khan wanted to bring Japan under his control in order to expand his empire and **plunder** their treasures.

In 1274, a Mongol army of 40 000 men set sail from Korea in nearly 900 ships bound for Japan. This was the first time the Japanese clans were forced to unite to fight a common enemy. The Mongol army far outnumbered the Japanese samurai, and used superior fighting techniques and weapons. The Japanese forces were no match for the Mongols. After one day of fighting, the Japanese took cover in a nearby fortress. As the Mongol soldiers rested on their ships that night, a storm hit, sinking around 200 ships and drowning about 13 000 men. The remaining ships returned home, unsuccessful in their invasion attempt.

Seven years later, in 1281, a second Mongol fleet returned, determined to conquer Japan. It was much larger, with 4000 ships carrying approximately 140 000 soldiers. Once again, as Mongol soldiers prepared to attack the Japanese, a massive storm hit. It wrecked the Mongol ships, and most Mongol soldiers drowned. Any survivors were hunted down and killed by the samurai.

As a result of the failed invasions, there were many significant changes in Japan. The Japanese believed that their gods had sent the storms to save Japan from the Mongols, so Zen Buddhism became very popular. The Japanese called the storms *kamikaze* (meaning divine wind). Kublai Khan seemed to agree that Japan was protected by supernatural forces, and he abandoned the idea of conquering the island nation. In addition, the samurai adopted different fighting styles and weapons modified from those they had seen the Mongols use.

For more information on this key concept, refer to page 200 of 'The history toolkit'.

15.4 CHECK YOUR LEARNING

Review and understand

1 **Describe** how two different clans influenced the role of the emperor.

2 Where did the Azuchi–Momoyama period get its name from?

Apply and analyse

3 **Analyse** the significance of the attempted Mongol invasions of Japan. Use the 5Rs (see page 212 of 'The history toolkit') to help you.

4 **Explain** why the shift of power from the Imperial Court to the local *daimyo* weakened the Ashikaga shogunate.

Evaluate and create

5 Copy this table into your book:

Shogun	Effect
Minamoto no Yoritomo	Introduced the feudal system

a Using information from Source 2, **list** the different effects each shogun had on Japan. One has been done to get you started.

b **Propose** which shogun you think had the biggest effect on Japan, and why.

6 Working in pairs or groups, have each person take on the role of one of the leaders in Source 2 and **create** a role-play. Think about the conversations they might have had: would they have been enemies or friends? Would they have been shocked or impressed by what each other did to the country?

15.5 Significant individual: Tokugawa Ieyasu

In this topic, you will:

- examine the role and achievements of Shogun Tokugawa Ieyasu
- consider the impact of developments made under Shogun Tokugawa Ieyasu.

Tokugawa Ieyasu (1542–1616) was the founder of the Tokugawa shogunate that lasted almost three centuries. His successful military career spanned six decades, and enabled him to enforce his control over all facets of life in Japan. After years of civil war, Ieyasu was declared the shogun in 1603. This brought stability, unification and peace to the country.

Early life

Ieyasu grew up during the Warring States period in Japan. This was a time of great upheaval and division throughout the country. He was separated from his mother when he was two years old, and at the age of five, his father – a *daimyo* – sent him away as a hostage to the powerful Imagawa clan. During the journey to this new family, Ieyasu was captured by another rival clan and held prisoner for two years. He was finally released to the Imagawa when he was seven, after his father was murdered by a close **vassal** in 1549.

vassal
a person who offered his loyalty and service to a lord in return for his protection and the granting of land

As a teenager, Ieyasu received extensive military training from the Imagawa. He became a lieutenant for the clan leader, Imagawa Yoshimoto. Ieyasu developed a love of falconry, was married and had the first of several sons. In 1560, Yoshimoto was killed, so Ieyasu returned to his hometown to assume control over the family castle.

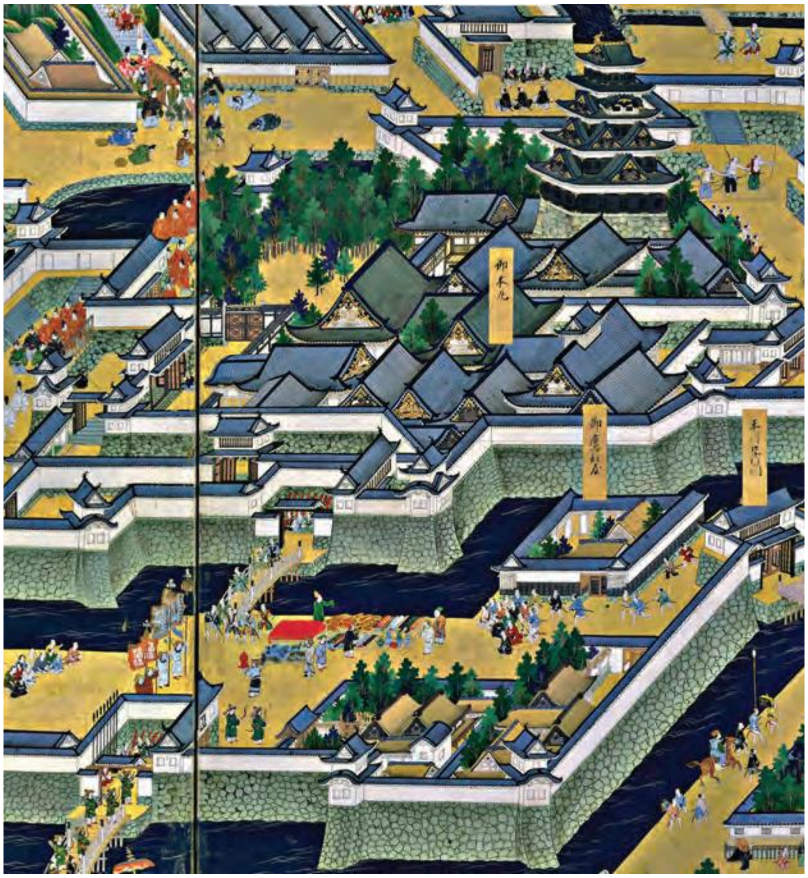
Military career

As the head of his family, Ieyasu formed a strategic alliance with Shogun Oda Nobunaga. This meant that Ieyasu was able to guarantee the safety of his family's castle, while also building his own army. In time, he became an important *daimyo* (see Source 4). As an ally of the shogun, Ieyasu distanced himself from the civil war that was still ongoing in Japan. Instead, he devoted his time to formulating policies in administration, taxation and legal matters within his local domain.

Source 4 A woodblock print of Tokugawa Ieyasu as a warrior *daimyo*, *c.* seventeenth century

When Shogun Nobunaga died in 1582, he was succeeded by Toyotomi Hideyoshi, who saw Ieyasu as a major rival. To avoid conflict, Ieyasu vowed to be loyal to the new shogun. In 1589, he showed this loyalty by assisting Hideyoshi in defeating a major *daimyo* clan – the Hojo – who held a large territory on the coast. As a reward, Hideyoshi gave Ieyasu the former Hojo territory, and Ieyasu moved his large army there – to a small fishing village called Edo (modern-day Tokyo).

Avoiding further conflict, Ieyasu focused on strengthening and growing Edo (see Source 5). Notably, he undertook engineering projects, including developing a water supply system and improving food supplies for the army. Ieyasu imposed taxes on the people, and confiscated all weapons from peasants to avoid any revolts.



Source 5 An artist's impression of Edo Castle in the seventeenth century

Tokugawa Ieyasu's achievements as shogun

- Introducing laws that limited the emperor's powers – these laws meant that the emperor had no power to make court appointments, and was restricted to focusing on poetry, scholarship and costumes of the imperial family
- Establishing a feudal system – all *daimyo* had to swear allegiance to the shogun who redistributed their land; each *daimyo* managed their own *han* (feudal domain)
- Imposing laws on all *daimyo* that required them to reside in Edo with their families and only retain one castle – this centralised power and reduced disputes over time
- Controlling a quarter of the countryside and earning an income from a 40% tax on the harvests collected
- Building the largest castle in the world in Edo, with a network of moats, stone walls, huge gatehouses, fireproof warehouses of rice and the *daimyo's* mansion; Edo became a busy town and port
- Controlling an army of over 150 000 men and a navy with thousands of ships

Source 6 Ieyasu introduced many new laws and policies to ensure his position was strong, unchallenged and permanent.

When Shogun Hideyoshi died, Ieyasu's army was the strongest in Japan (at almost 89 000 men).

Hideyoshi's soldiers triumphed against the army of another *daimyo* at the Battle of Sekigahara in October 1600, which was one of the most important battles in the history of feudal Japan, and the last major internal conflict in the country.

Ieyasu stripped all land from *daimyo* who opposed him, and allocated it to his allies in return for their loyalty. In 1603, the emperor elevated Ieyasu to shogun.

Shogun of Japan

At the age of 60, Shogun Ieyasu introduced many new laws and policies to ensure his position was strong, unchallenged and permanent (see Source 6). After two years, he introduced the hereditary aspect of the position of shogun by retiring and passing the title to his son, Hidetada. However, he remained a key adviser (see Source 7) and was responsible for foreign affairs.

Source 7

> The strong manly ones in life are those who understand the meaning of the word patience. Patience means restraining one's inclinations. There are seven emotions: joy, anger, anxiety, adoration, grief, fear, and hate, and if a man does not give way to these he can be called patient. I am not as strong as I might be, but I have long known and practised patience. And if my descendants wish to be as I am, they must study patience.
>
> Quote from Ieyasu, who turned to scholarship as a retired shogun, providing great insight into leadership

Ieyasu welcomed trade with the Dutch, Portuguese and English. Through this trade, Edo acquired new goods and information. Christian missionaries had also asked to grow Christianity within Japan. However, by 1612 Ieyasu saw Christianity as a threat to the shogun's power and introduced laws to ban Christian worship.

Despite introducing so many laws, Ieyasu did not feel his family was secure. The son of the previous shogun, Hideyoshi, was growing up in a great castle at Osaka and becoming a threat. By 1614, Ieyasu was an old warrior, but he mobilised an army to attack Osaka and remove his last rival in Japan.

Legacy

In 1616, Ieyasu fell ill and died. He left a strong family lineage and lasting peace in Japan. He accomplished the kind of leadership that warriors before him had been attempting for over a century. According to his wishes, he was honoured as a Buddhist deity at the Toshogu Shrine in Nikko. The shrine records his words of wisdom: 'One who treats difficulties as the normal state of affairs will never be discontented ... Harm will befall one who knows only success and has never experienced failure.'

The Tokugawa shogunate established by Ieyasu lasted until 1868 and is more commonly referred to as the Edo period. Historians describe it as a time of economic growth and strict social order, where arts and culture flourished. Perhaps most significantly, war and conflict were at a minimum.

Source 8 A statue of Ieyasu at Toshogu Shrine, Nikko

Key skill worksheet
Determining historical significance: Tokugawa Ieyasu

15.5 CHECK YOUR LEARNING

Review and understand

1 **Outline** two strategies Tokugawa Ieyasu used to keep his power as *daimyo* under two different shoguns.

2 Read Source 7. **Define** the meaning of 'patience', according to Tokugawa Ieyasu.

Apply and analyse

3 **Apply** the concept of empathy. How do you think Ieyasu's childhood affected the rest of his life?

4 **Describe** the personality traits of Tokugawa Ieyasu. How do you think he was perceived by the population?

Evaluate and create

5 Look closely at Source 4.

a **Describe** the features that highlight Tokugawa Ieyasu's status as a warrior lord.

b **Research** the clothing, accessories and symbols worn by shoguns and *daimyo* in Shogunate Japan. Design your own warrior outfit and annotate the features you include.

6 Read Source 6. With a partner, **discuss** how each of Ieyasu's achievements helped him to maintain the shogunate. Copy and complete the table below to rank them, from most important to least important. If you do not agree on the order, then debate your reasons.

Rank	Achievement	Reasons
1		
2		
3		

15.6 Social groups in Shogunate Japan

In this topic, you will:

- describe the social structure in Shogunate Japan
- distinguish between key social groups and their relationship with each other.

hierarchy
a social structure that organises people with the most important group on top, and others ranked beneath in decreasing order of importance

Key skill worksheet
Analysing sources: Shoguns on social order

Interactive
Social groups in Shogunate Japan

Feudalism was a system for organising groups of people within society. Like the system in place across much of medieval Europe, feudalism in Japan classified social groups in order of importance. Each of these groups had certain rights (that is, things they could expect, such as protection) and responsibilities (that is, work they had to perform in return, such as military service or farming). A person's position in this **hierarchy** was determined at birth and was strictly defined. People knew what was expected of them and were not able to move between social classes. There were even restrictions on the levels of interaction allowed between certain groups.

Although feudalism was first introduced in Japan under the rule of Minamoto no Yoritomo, who was named the first shogun in 1192, it became stronger during the Tokugawa shogunate (1603–1868).

Source 9 The social structure of Shogunate Japan

The emperor
The emperor of Japan was regarded as the spiritual and symbolic head of the country and descended from the gods. From 1185 onwards, however, the emperor had no real power and his role was mainly ceremonial. He was still seen as the head of state and was expected to officially give the shogun his title and right to rule. The emperor lived in the Imperial Palace in Kyoto.

The shogun
The shogun was the emperor's leading general. Between 1185 and 1868, shoguns formed their own governments and controlled Japan. As well as commanding the military, shoguns ran the everyday affairs of the country and were responsible for collecting taxes.

Daimyo
Daimyo were regional landowners allowed to rule provinces in return for providing loyalty and military support to the shogun. While the shogun owned 25 per cent of the land, the rest of the land was divided into 275 regions ruled by different *daimyo*. The shogun's authority depended on the loyalty of these *daimyo*. Each *daimyo* controlled a private army made up of samurai warriors that were made available to the shogun when needed. Each *daimyo* depended on the loyalty of his samurai, together with the labour, taxes and military assistance of the peasants living in his province, in order to hold power.

Samurai
Samurai were warriors who swore allegiance and loyalty to their *daimyo*. They wore plain, dark clothes bearing a clan crest so they could be easily identified. Male samurai wore two swords denoting their warrior status. Female samurai would also train in martial arts such as archery. (More information on samurai is provided in the next topic.)

Peasants
Peasants were the largest single group in Japanese society, making up around 80 per cent of the population. Most peasants were farmers, but this group also included woodcutters, fishermen and mine workers. Unlike European peasants, peasants in Japan were given a higher rank than merchants and craftspeople, because it was believed that they performed an essential and important role in society – that is, producing food on which everyone depended. Despite this higher status, peasants lived a harsh life.

Craftspeople and merchants
Craftspeople were those who made goods and tools, including sword smiths, printers, boatbuilders and carpenters. Craftspeople received less official respect than peasants because, according to Confucian thought, people could live without the goods they made. Merchants lived by trading and transporting goods, lending money and running shops. They were given little respect because it was considered that they produced nothing useful themselves, only profited from the hard work of others. Merchants tended to live in the larger towns and cities and, despite their low status, they could be very wealthy.

Outcasts
At the bottom of the social ladder were two outcast groups – the *eta* and the *hinin*. The *eta* ('much filth') performed tasks such as butchery, leatherwork, or burials that involved the handling of dead people or animals. The *hinin* ('non-persons') were undesirables, such as street-cleaners, ex-convicts and actors.

15.6 CHECK YOUR LEARNING

Review and understand

1 In your own words, **describe** how the feudal system was organised in Japan.
2 **Describe** the rights that each *daimyo* received from the shogun, and what responsibilities he had in return.

Apply and analyse

3 **Explain** why Japanese craftspeople and merchants were seen as being lower on the social hierarchy than peasant farmers.

Evaluate and create

4 Imagine you had the opportunity to interview a person from each of the social groups described in this topic. Write three questions for a person in each social group that would help you to gather information about their lives and experiences as a member of that group.

15.7 Women in Shogunate Japan

In this topic, you will:

» develop an understanding of the roles and perspectives of women in Shogunate Japan.

Women were seen as less important to men in Shogunate Japan. They had few freedoms and were mainly responsible for the household.

Most historical sources are written by or about men, which means there is only limited information regarding the role of women in Shogunate Japan. There is, however, some evidence that they were allowed to inherit property and could move around freely under certain shoguns.

Marriage and everyday life for the higher classes

An upper-class girl's education involved learning domestic duties and some academic disciplines, such as reading, writing, history, counting and philosophy.

To increase a family's social status and wealth, it was common practice for daughters to be married into families of higher status. Women had no say in this arrangement and were expected to obey their husband and father-in-law once married. If a woman became a widow, she was not allowed to remarry.

Two women became empresses during the Edo period, but women have been legally excluded from the throne since 1869.

Quiz me!
A quick quiz on women in Shogunate Japan

Source 10

> The five worst maladies that afflict the female mind are: indocility, discontent, slander, jealousy, and silliness. Without any doubt, these five maladies infest seven or eight out of every ten women, and it is from these that arises the inferiority of women to men. A woman should cure them by self-inspection and self-reproach.
>
> Extract from Confucian scholar Kaibara Ekken (1630–1714)

See, think, wonder

Look at Source 11.

- What do you see?
- What do you think?
- What do you wonder?

Source 11 A Japanese painting of a samurai woman defeating a man

Women of the warrior classes

Most women learnt some combat skills in order to defend their home during wartime. Some women could train to become an *onna-bugeisha* (female martial artist) or samurai. Samurai women were highly sought-after due to their bravery and loyalty. It was very rare for them to fight on the battlefield; instead, their role was to defend towns and villages in times of need.

Geisha culture

Geishas were performing artists who were trained in music and dance. Training began during childhood, when a young girl would live in an *okiya* (training house). There, she learnt musical instruments, traditional dances, poetry and the art of entertaining conversation.

geishas
Japanese women trained to entertain men with conversation, dancing and singing

Geishas provided light entertainment to guests. They were highly respected for their skills, femininity and wealth. They walked with the utmost elegance, wearing a draped kimono, platform shoes and striking make-up. This included a white powdered face, blackened teeth, small red lips, and red and black eye make-up.

A geisha was expected to continue training throughout her life. Geishas earned money, but it was often given back to their *okiya*.

Source 12 A staged photo portraying the type of peasant dress worn in Shogunate Japan, *c.* 1880

Peasant women

Women in the lower classes enjoyed greater freedoms in life. They would work on the farms, or as servants for the rich and look after their children. Wives of artisans or labourers could assist with their husband's business. These women were able to spend the money they earned more freely than other women, and they were also allowed more freedom to choose who they married.

Japanese tea ceremony

The ritual of tea-making was introduced during the twelfth century by a Buddhist monk who established a specific way to prepare tea, by mixing matcha – a powdered green tea – with hot water. Tea came to be seen as a status symbol among the male warrior class.

By the sixteenth century, drinking tea was so treasured that a ceremony evolved. Every tea ceremony included the principles of harmony, respect, purity and tranquillity.

During the Edo period, tea ceremonies were reserved for upper-class men.

However, after the Meiji restoration in 1868 (see topic 15.13), geishas underwent training in tea ceremonies. Young women were also expected to study it to be eligible for marriage. This was a significant change in the gender roles of tea-making, which continues today.

KEY CONCEPT Continuity & change

For more information on this key concept, refer to page 200 of 'The history toolkit'.

Source 13 A modern-day geisha performing a Japanese tea ceremony

15.7 CHECK YOUR LEARNING

Review and understand

1 **Describe** how marriage could be used to advance a family's social status.

2 **Identify** one way in which peasant women had more freedom than women from higher social classes.

Apply and analyse

3 Read Source 10 carefully.

a Identify the intended audience for this extract. **Explain** why you think this is the case.

b Identify the purpose of this extract. **Explain** why you think this is the case.

c Identify the tone of the author. What values do you think they might hold? **Explain** why you think this.

d In a paragraph, **summarise** how useful this extract is in understanding perspectives on a woman's place in Shogunate Japan. Use your answers from questions 3a–c to help form your response.

Evaluate and create

4 **Evaluate** the freedom of women in Shogunate Japan. Remember, when you evaluate something you should talk about its strengths and weaknesses. Be sure to give your overall opinion. Think about the level of freedom women had in education, marriage and work.

5 **Research** a female Japanese samurai. Write a paragraph about her achievements. Include a description of the image and its portrayal of her.

15.8 The life of a samurai

In this topic, you will:

» explain the way of life for a samurai living under the shoguns.

bushido
the code of behaviour of the Japanese samurai warrior that required honour, loyalty (even to death), good living, thrift and martial arts skills

All *daimyo* had armies of samurai. The samurai played a key role in Japanese society during the Edo period (1603–1868).

Each samurai warrior was expected to live and die by a set of rules. During the Edo period, the training for every samurai began at the age of five. Young samurai learned fighting and military skills, as well as reading, writing, calligraphy, etiquette and public service. By the age of 15, the samurai had finished their training.

The *bushido* code

Samurai lived under a strict code of behaviour known as ***bushido*** (meaning 'the way of the warrior'). This code was based on honour, loyalty, respect and discipline (see Source 14). During training, samurai were expected to withstand many physical challenges, such as walking barefoot through snow or going for long periods without food. According to *bushido*, every samurai's first duty was to honour and obey his master. If a samurai was defeated in battle, captured by the enemy, or dishonoured in any way, the code required him to commit ritual suicide – an act known as *seppuku*. It was believed that by taking his own life in this way, the samurai and his family would be spared public shame and disgrace.

Elements of the *bushido* code

- **Benevolence** – showing kindness towards others and those in need
- **Readiness** – mental and physical health; being ready for action
- **Organisation** – efficiency in all things
- **Respect** – to others, to parents, to their ancestors and lords
- **Fidelity** – always doing the right thing and following others

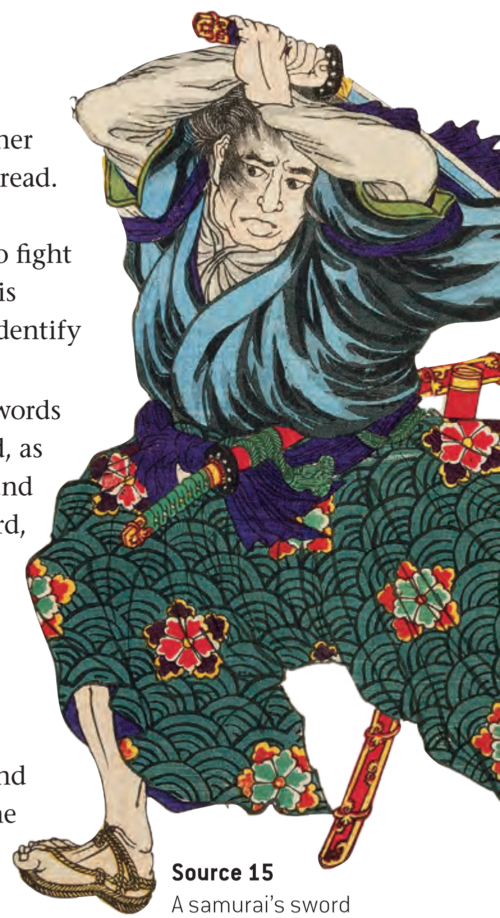
Source 14 The *bushido* code was based on honour, loyalty, respect and discipline.

Weapons and armour

Samurai armour was created by lacing together small pieces of leather and iron using silk thread. Together, these pieces were like fish scales – creating armour that was flexible and easy to fight in, and weighed as little as 10 kilograms. This armour was decorated so that others could identify the person wearing it.

Each samurai had both a long sword and a short sword. Swords became a symbol of honour and status during the Edo period, as no other groups in Japanese society (other than the shogun and *daimyo*) were allowed to carry them. If a samurai lost his sword, it was considered a great loss of honour. If the samurai was dishonoured, he was also expected to use the short sword to commit *seppuku*. Most samurai also carried bows and arrows.

Video
The traditional way of making a samurai sword



Source 15 A samurai's sword became a symbol of his status and honour.

Warfare

In early samurai traditions, warfare took place in the open and there were strict rules governing how battles were fought. The opposing sides would agree where and when each battle was to take place. Once the armies were lined up facing each other, a single samurai would move forward from each side to issue a challenge. The pair talked of their strength and of the power of their ancestors. They then fired an arrow at each other. It was only then that the two samurai moved in to fight.

Each samurai would cut off the heads of those he killed on the battlefield and present them to the *daimyo*. In later wars, samurai stopped removing enemy heads and simply collected noses, as they were easier to carry.

During the Warring States period in the 1500s, the size of samurai armies increased from thousands to tens of thousands. Military tactics also developed during this period, with armies organised into troops. Samurai rode on horseback, but commoners could join the armies as foot soldiers. With the increased use of guns, the samurai began to adopt more European-style group warfare, as well as siege warfare.

The peaceful Edo period began in 1603, and meant the samurai had nobody to fight. As a result, the shogun began to reduce the number of samurai being trained, and many samurai took up administrative positions.

Writing a historical description

Historical descriptions pull out the main characteristics of a historical source and 'paint a picture' in words for the reader. Because of this, writing historical descriptions is an important skill for all historians to master.

Look at the two images in Source 16. Compare the samurai and the medieval knight, using the annotations to assist you in describing each painting.

Log onto your obook pro and complete the key skill worksheet 'Writing a historical description' to practise this skill.

KEY SKILL
Communicating & reflecting

Key skill worksheet
Communicating & reflecting: Writing a historical description

Source 16 Paintings of a samurai (left) and a medieval knight (right); there were many similarities between the two warriors, but also some differences.

15.8 CHECK YOUR LEARNING

Review and understand

1 In your own words, **define** the term *bushido*. List three qualities that were demanded under the *bushido* code.

2 What action was a samurai required to take if he was captured or defeated in battle?

Apply and analyse

3 In a short paragraph, **explain** the way of life for a samurai living under the shoguns.

4 a **Compare** the images in Source 16. What are their similarities and differences?

b Which would be better in battle and why?

Evaluate and create

5 Using the information provided in this topic, together with information gathered on the internet, **create** a week-long training program for a young samurai who has recently been recruited at age five.

15.9 Towns and castles

In this topic, you will:

» extend your understanding of daily life under the *daimyo* by looking at a feudal castle.

Most towns built across Japan during the rule of the shoguns were made from wood, as this was the most freely available material. Internal walls of buildings and houses were typically screens made of paper or light wood, and rooms were divided with sliding doors. Initially, towns and castles were surrounded by simple moats or wooden fences, but more complicated structures began to be built from the fourteenth century onwards.

By 1615, over 200 castles had been built all over Japan by *daimyo* who were eager to display their wealth and power. These castles were surrounded by homes belonging to the *daimyo,* his family, his samurai and other social groups. The *daimyo* and his samurai would often retreat to the castle tower when they were being attacked. When not under attack, many would live in the areas inside the outer walls in more comfortable homes.

Himeji Castle is located in the city of Himeji, 100 kilometres west of Osaka. Himeji Castle is often referred to as the ‘White Heron Castle’ because its bright white plaster walls and black woodwork resemble a bird taking flight. The castle sits at the top of a hill and its *donjon* (central tower) stands 46.4 metres above the ground. It has a complicated defence system, similar in many ways to a maze. When the castle was rebuilt in the seventeenth century, it incorporated the most up-to-date military technology of the period.

Source 17 An artist’s impression of Himeji Castle

15.9 CHECK YOUR LEARNING

Review and understand

1 **Identify** one reason why Japanese buildings were generally built from wood.

2 **Describe** how the Japanese protected their wooden castles from fire.

Apply and analyse

3 **Examine** Source 17 carefully.

- a **Explain** how an attack on the *donjon* was made difficult.
- b **Identify** three further defence mechanisms built into the castle design.
- c **Explain** the need for a number of different moats.

Evaluate and create

4 **Research** Himeji Castle further, using the library and internet. Write a summary of the key features of the castle. See Rich task 15A on page 344 for a reminder of how to write a strong historical summary.

Explore it!
A virtual field trip to Himeji Castle

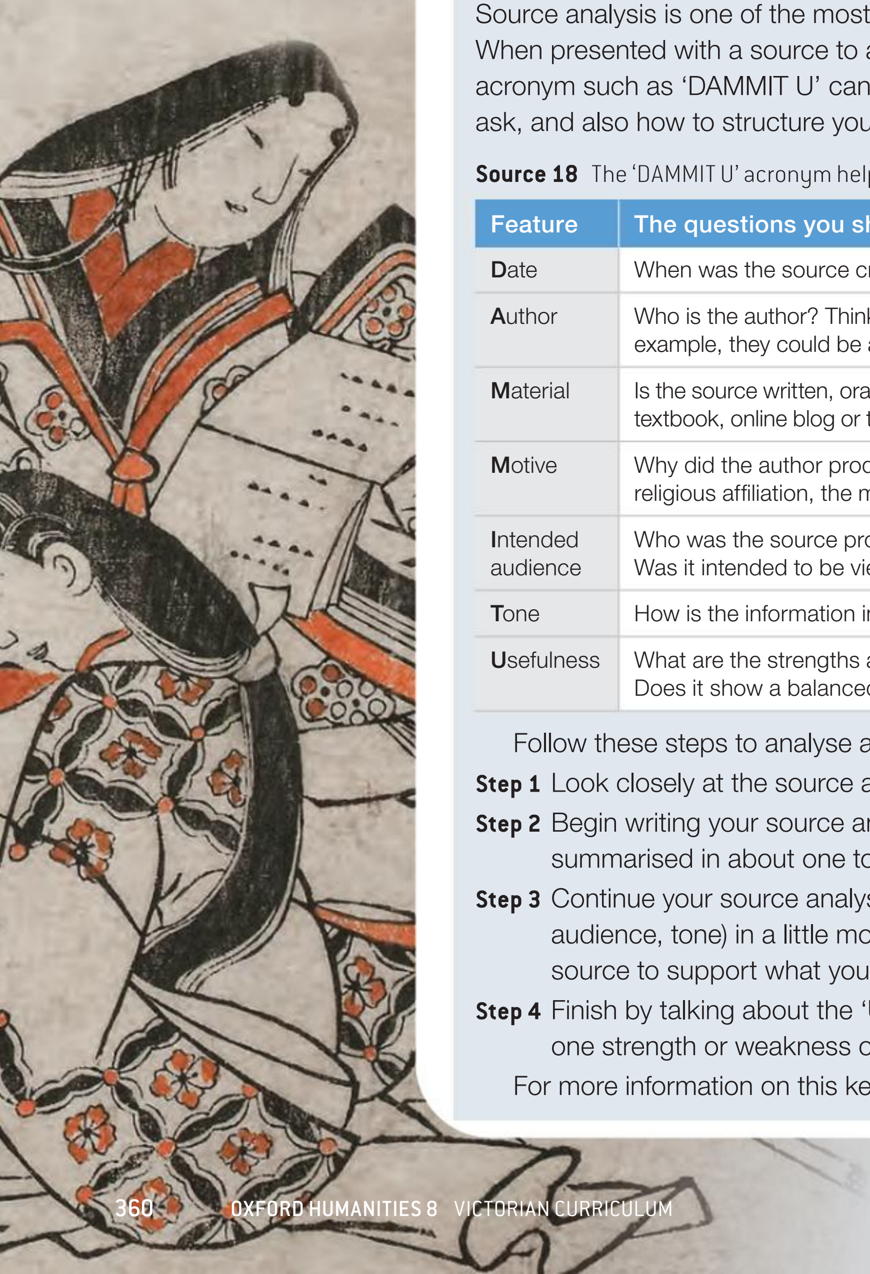
15B RICH TASK

Quizlet
Revise the key terms you have learnt so far.

The Pillow Book

Sei Shonagon (*c.* 966–1017 CE) was a court lady during the Heian period. She kept a diary to express her thoughts and feelings. She called it her 'pillow book'.

This valuable source provides first-hand insights into life in the Imperial Court, which were not intended to be viewed by others. These include Shonagon's perspectives towards authorities, her descriptions of daily life, and her personal poems, ideas and essays.



KEY SKILL
Analysing sources

Writing a source analysis

Source analysis is one of the most important skills that historians need to master. When presented with a source to analyse, begin by asking questions. The use of an acronym such as 'DAMMIT U' can make it easier to remember which questions to ask, and also how to structure your response.

Source 18 The 'DAMMIT U' acronym helps you to remember the questions you should ask yourself.

Feature	The questions you should ask when looking at sources
Date	When was the source created? Is it a primary or secondary source?
Author	Who is the author? Think about their gender, age, social status and profession. For example, they could be a historian, a leader, an aristocrat, a soldier or a prisoner.
Material	Is the source written, oral or visual? It could be a newspaper, letter, diary, photograph, textbook, online blog or tweet, or even statistics in the form of a graph or map.
Motive	Why did the author produce this source? Was it for official government use, a religious affiliation, the media or personal reasons?
Intended audience	Who was the source produced for? Was it for academics or the general public? Was it intended to be viewed, or was it meant to be private?
Tone	How is the information in the source expressed? How does it make you feel?
Usefulness	What are the strengths and weaknesses of the source as a piece of evidence? Does it show a balanced opinion or a one-sided point of view?

Follow these steps to analyse a source:

Step 1 Look closely at the source and seek to answer the questions in Source 18.

Step 2 Begin writing your source analysis. The 'DAM' (date, author, material) can be summarised in about one to three sentences.

Step 3 Continue your source analysis by writing about the 'MIT' (motive, intended audience, tone) in a little more detail. You should provide examples from the source to support what you are saying in the 'MIT' section.

Step 4 Finish by talking about the 'U' (usefulness) of the source. Do this by discussing one strength or weakness of the source.

For more information on this key skill, refer to page 216 of 'The history toolkit'.

Source 19 An artist's impression of Sei Shonagon from the illustrated book *Collection of Pictures of Beauties*; historians believe this illustration was created around 1683.

Worksheet
The Pillow Book

Source 20

When I make myself imagine what it is like to be one of those women who live at home, faithfully serving their husbands – women who have not a single exciting prospect in life yet who believe that they are perfectly happy – I am filled with scorn … I cannot bear men who believe that women serving in the Palace are bound to be frivolous and wicked. Yet I suppose their prejudice is understandable. After all, women at Court do not spend their time hiding modestly behind fans and screens, but walk about, looking openly at people they chance to meet. Yet are the gentlemen themselves any less so? They are not exactly bashful when it comes to looking at the great people in the Palace. No, everyone at Court is much the same in this respect.

Extract from *The Pillow Book*: On court life

Practise the skill

1. Copy the table from Source 18 into your book, but in place of the questions in column 2 write your observations and answers to them in response to Source 20.
2. Having now answered all of your questions, follow steps 2 to 4 to write a short paragraph **analysing** Source 20.
3. Log onto your obook pro to find more *The Pillow Book* sources on which to practise. Follows steps 1 to 4.

Extend your understanding

1. **Apply** the concept of empathy to describe how a female living during Shogunate Japan may have felt about the regulations that authority figures imposed on them. Try to discuss both positive and negative aspects from their point of view. Present your description as your own *The Pillow Book* entry.
2. **Research** *The Pillow Book* on the internet and find two sources that you think are interesting. In small groups hold a discussion about *The Pillow Book*. Read each of your sources aloud and then explain why you chose them.

15.10 Changes to foreign policy

In this topic, you will:

- explore the changing policies affecting trade and interactions with foreign groups.

Under the rule of the shoguns, Japanese society, customs, arts and culture, and government policy changed in many ways. One of the most significant changes related to Japan's foreign policy.

Since the mid-1500s, Portuguese, Spanish, English and Dutch traders had been visiting Japan; however, during the Edo period (1603–1868), Japan's relationship with the outside world became strained. Although many *daimyo* wanted contact with foreigners – mainly to buy weapons and other products – the Tokugawa shoguns feared that the influence of the West would corrupt Japan. They put in place a policy to first limit, and then completely cut off contact between Japan and the West. This policy of isolation would bring about many changes in Japanese society.

Source 1 This painting by a Japanese artist shows Portuguese missionary Francis Xavier and his entourage arriving in Japan in 1547.

Christian missionaries

The early Portuguese and Spanish traders brought missionaries with them who came to convert the Japanese to Christianity. Christianity spread rapidly in Japan, and by 1570 over 30 000 Japanese had become Christians.

Though Christianity was allowed to grow until about 1620, Shogun Tokugawa Ieyasu soon began to see it as a real threat to the stability of the shogunate. It threatened Japanese society on several levels. For example, it called for loyalty and obedience to a foreign power – the Pope – before the shogun. Christian church congregations were also mixed, and allowed interaction between different social classes. This was frowned upon in Japanese society. Ieyasu eventually banned missionaries from Japan. Around 10 years later, another shogun by the name of Tokugawa Iemitsu took even stronger action. He began persecuting Christians from 1633 onwards, and finally outlawed Christianity altogether in 1637.

Foreign trade

Between 1603 and 1635, Ieyasu attempted to monitor and control trade with the outside world by putting a permit system in place. He issued 350 red-sealed permits for merchant ships. He then allocated these permits mainly to his favourite *daimyo* and to key merchants who were interested in foreign trade. Only 12 European and 11 China-based traders are known to have received permits; all other non-Japanese traders were refused. At this time, Japanese merchants mainly exported silver, copper, diamonds and swords, while Japan primarily imported silk from China, and sugar and deerskins from South-East Asia.

The shogun's red seal guaranteed the protection of the ships and allowed them to enter Japanese ports. Ieyasu vowed to pursue any pirate or nation that violated the seal.

The policy of isolation

When Shogun Tokugawa Iemitsu came to power in 1623, he wanted to limit contact between Japan and the outside world even further, because he believed that foreign influence was a threat to his rule. In 1633, he outlawed Western traders from stepping foot on mainland Japan, and also made it illegal for Japanese people to leave. Any Japanese person who did manage to leave and was then caught trying to return was sentenced to death. This policy was known as ***sakoku*** ('locked country'). It was an attempt to put a stop to Western influences (such as religion, philosophy and technology) on Japanese people. From 1633 until 1853, there was no trade with the outside world apart from some limited contact with China and the Netherlands through a small human-made island off the coast of mainland Japan called Dejima, which was heavily guarded.

Key skill worksheet
Identifying continuity & change: Japan's policies

sakoku
the name given to Japan's foreign policy during the Edo period that forbade any Japanese person from leaving Japan, or any foreigner from entering it; the penalty for disobeying was death

William Adams and the shogun

William Adams is a significant figure in the history of Japan. Adams was an Englishman who sailed with a Dutch fleet. In 1598, he anchored off the coast of the Japanese island of Kyushu. After a long and difficult voyage, only nine of his crew were fit enough to land. Following their arrival, Adams' crew were imprisoned because Portuguese missionaries on the island claimed they were pirates. Adams was questioned by the future shogun, Ieyasu, and struck up a relationship with him. In 1604, Adams was ordered by Ieyasu – who was now shogun – to help build Japan's first ship according to Western designs. The following year, a second ship was constructed.

By 1608, Adams was acting for Ieyasu, helping to establish relationships with traders in the Philippines. Over time, he became a personal adviser to Ieyasu.

Adams helped to establish a Dutch trading base in Hirado, Japan. He also encouraged the English in Indonesia to trade with Japan, helping establish the British East India Company in 1613. Thanks to Adams, the English gained a red seal that gave them the right to live, buy, sell and trade in Japan.

For more information on this key concept, refer to page 201 of 'The history toolkit'.

KEY CONCEPT
Significance

Source 2 In 1598, sailor and navigator William Adams (standing) was the first Englishman to visit Japan. He was initially imprisoned as a suspected pirate, but was freed after building two ships for Tokugawa Ieyasu (seated, second from left).

15.10 CHECK YOUR LEARNING

Review and understand

1. Why were many *daimyo* interested in trading with foreign countries?
2. By 1620, Christianity had come to be considered a threat to Japanese society. **Outline** the steps that led to this.

Apply and analyse

3. **Explain** the significance of William Adams. What skills and technology did the Japanese learn from him?
4. **Examine** Source 2. What evidence does this source present that Adams was well treated and that the Japanese attitude towards outsiders was changing?

Evaluate and create

5. **Evaluate** the policy of *sakoku.* Remember, when you evaluate something you should talk about its strengths and weaknesses, and also give your overall impression of it.

15.11 Changes to cities and the environment

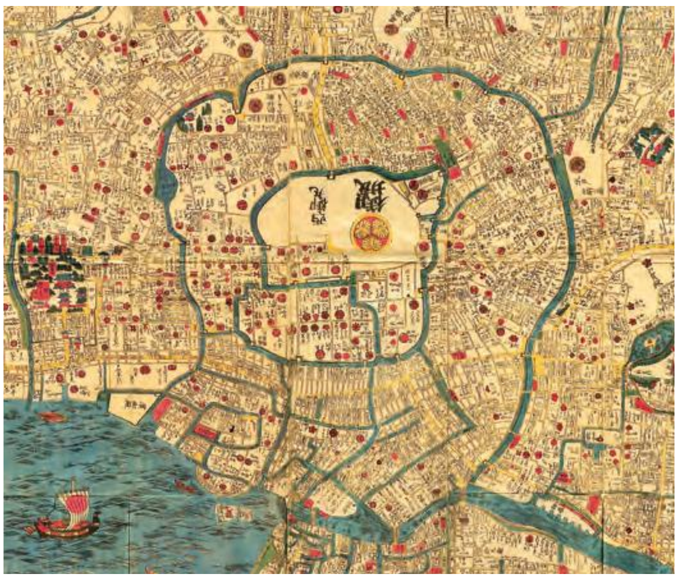
In this topic, you will:

» explore the impact of population expansion on natural resources.

Key skill worksheet
Analysing cause & effect: Population and resources

When the Tokugawa shogunate began its rule in 1603, it ended the conflict of the previous four centuries. The Tokugawa (or Edo) period brought 250 years of stability to Japan. The shogun had national authority, and his *daimyo* had regional authority. In response to this stability and peace, Edo became an economic and cultural hub.

However, the expansion of the city of Edo started to push Japan to its ecological limits. With a booming population and limited resources, the people were required to develop a more sustainable way of life.



Source 3 A map of the city of Edo (with Edo Castle shown in the centre), drawn around 1844

Source 4 A satellite image of Edo Castle today

The development of Edo

After coming to power in 1603, Shogun Tokugawa Ieyasu began a period of rapid development in the city of Edo – particularly the building of Edo Castle. Canals were dug to deliver clean water and to drain marshland. During the peak period of Edo's development, there were over 150 kilometres of water pipes underneath the city, making it one of the largest water networks in the world. Extensive road networks were also built to support the constant travel of *daimyo* and their samurai to and from the new centre of Japanese society – even though Kyoto (where the emperor lived) was still officially the capital.

Towns and businesses grew along the roads. By 1721, the feudal town of Edo had become the largest city in the world, with over 1 million residents (see Source 3). Today, Edo is known as Tokyo and is still one of the largest cities in the world, with a population of more than 35 million.

Environmental management

In 1570, Japan's population reached 10 million. This spike in population led to unsustainable logging practices. Wood had always been a primary source of building material as well as fuel in Japan. It was used extensively in temples, shrines, castles, houses and shipbuilding. The huge growth in the size of cities led to increased demand for wood, which caused widespread **deforestation**.

In around 1666, the shogunate introduced an advanced forestry management policy called *Yamakawa Okite* to reduce logging and increase the planting of trees. From then on, only the shogun and *daimyo* could authorise the use of wood.

deforestation
the action of clearing a wide area of trees

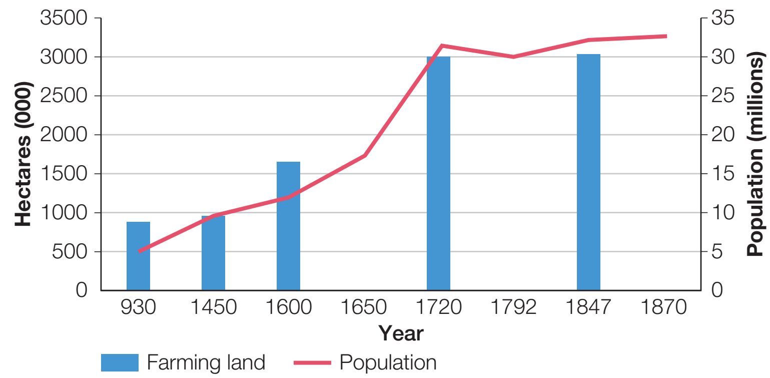
The Tokugawa shogunate also established a policy of planting Japanese cedar trees, and controlled who could own land in forest areas. The shogunate banned individual ownership of forested land, and limited access to forests by the *daimyo*. Communities were encouraged to plant trees on common land. Children would learn the phrase 'a mountain without trees is of little worth'.

By 1724, timber harvesting had declined by 60 per cent. It remained at low levels for the next 30 years, but many historians believe that Japan's forests did not fully recover until the early twentieth century.

The development of agriculture

In agricultural regions, *daimyo* looked at methods to increase productivity on their land in order to meet the growing demand for food production. More land became available for farming as water projects delivered more reliable water supplies for irrigation, and also provided solutions to control flooding. These improvements enabled rice production to move from subsistence levels (growing only enough to eat) to commercial levels (growing enough to eat and trade).

Sources 5 and 6 give more details on expansion during the Edo period.



Source 5 Population growth and farming land on the Kanto Plain surrounding Edo

Source 6 Number of major civil engineering projects in Japan

Time	Period	Number of projects
1467–1595	Pre-Edo period	once every nine years
1596–1672	Early Edo period	approx. twice every year
1673–1745	Mid-Edo period	once every three years
1746–1868	Late Edo period	once every five years

15.11 CHECK YOUR LEARNING

Review and understand

1 **Identify** three key developments that took place in the city of Edo.

2 **Outline** three examples of how timber was used as an important resource in Shogunate Japan.

Apply and analyse

3 **Examine** Sources 5 and 6.

a **Describe** the relationship between population growth and farming land in Source 5.

b **Identify** the period of most growth and development in Japan.

c *Yamakawa Okite* was introduced around 1666. What impact did it have on agricultural development in Japan?

4 After 1724, a common saying in Japan was 'one cyprus tree, one human head'. What do you think this tells us about the changing attitude towards using timber?

5 With a partner, look closely at Sources 3 and 4. **Determine** (decide) whether they demonstrate the historical concept of continuity and change.

Evaluate and create

6 In small groups, **research** the current logging policy in Japan. In your groups, discuss any examples of continuity or change between Japanese forest management during the Edo period and today.

15.12 Changes in culture and the arts

In this topic, you will:

» investigate the cultural achievements under the Tokugawa shogunate (Edo period).

During the Edo period (1603–1868), there was great cultural growth in Japan. The samurai educated themselves in areas such as literature, philosophy and the arts. They were expected to be as skilled in writing poems as they were in fighting. Townspeople also adopted a new focus on the arts, which they saw as expressions of learning and education.

Bonsai

During the Kamakura period (1185–1333), when Zen Buddhism was spreading into Japan, the practice of cultivating miniature trees in ceramic trays quickly became popular. In fact, the art of *bonsai* ('tray planting') remains popular to this day. The roots and branches of *bonsai* trees are continually trimmed to make them look as natural as possible. For example, a Japanese maple tree that might grow to 6 metres in the wild can be kept as small as 10 centimetres when grown according to *bonsai* methods. One of the oldest known living *bonsai* trees is a pine tree pruned by Shogun Tokugawa Iemitsu (see Source 7).

Source 7 This 550-year-old *bonsai* pine tree was pruned by Shogun Tokugawa Iemitsu.

Japanese poetry

Another art form that flourished during the rule of the shoguns was poetry. The Japanese created distinctive forms of poetry to capture the beauty of nature, and the joy and sadness of life.

Haiku poems became very popular in the seventeenth century. They are made up of 17 syllables (single sound units) divided into three parts – the first part has five syllables, the second has seven syllables and the third has five syllables. The most famous poet of the Edo period in Japan was Matsuo Basho. His *haiku* poems, such as the one in Source 8, captured the feeling of a scene in a few simple words.

Source 8 The most famous Japanese *haiku* is 'Old Pond' by Matsuo Basho.

In Japanese script	Pronounced in Japanese	Translates in English
古池や	fu-ru-i-ke ya (5)	The old pond
蛙飛込む	ka-wa-zu to-bi-ko-mu (7)	A frog leaps in …
水の音	mi-zu no o-to (5)	A sound of water splashing.

Doll-making

Doll-making is a Japanese tradition from ancient times. They were used in rituals, and often placed in shrines within the home. It was believed dolls could trap bad spirits, and offer protection.

Wealthy families began buying dolls as gifts, elevating them to a status symbol. As a result, trade was so competitive that regulations were placed on the materials used to make dolls. Since the late seventeenth century, a festival has been held each year on 3 March called *Hina Matsuri*. It is a celebration dedicated to girls, in which parents pray for the health and happiness of their daughters. Dolls are an important part of this festival; they were originally used as charms to ward off evil spirits.

Source 9 On *Hina Matsuri*, girls display their ornamental dolls dressed in traditional dress from the Heian period and dedicate peach blossom to them. According to superstitions, they must remove the dolls immediately on 4 March to avoid a late marriage.

Origami

The Japanese word '*origami*' is made up of two smaller words – *ori* ('to fold') and *kami* ('paper'). Japanese *origami* began in religious ceremonies after Buddhist monks carried paper from China to Japan during the sixth century.

During the Edo period *origami* became a popular form of entertainment for the merchant classes and the common people. It is now also a popular art form with children around the world.

Woodblock prints

Woodblock printing became popular during the Edo period as a means to mass-produce artwork. Images would be carved onto wooden blocks, and ink would be spread over the wood. The wood was then pressed onto the chosen surface, creating a copy of the image on the woodblock.

From the seventeenth century, woodblock prints began to capture the more extravagant aspects of the upper-class Japanese lifestyle in Edo. The art form became accepted as a genre called *ukiyo-e*, representing 'images of the floating world'.

Source 10 This woodblock print is called *Three Beauties of the Present Day* by Kitagawa Utamaro, *c.* 1793. It is an example of how *ukiyo-e* represented the bustling urban culture of Edo.

Martial arts

Followers of Zen Buddhism learnt to control their bodies through martial arts or combat sports.

Jujutsu

Jujutsu ('the gentle art') is used to train for close combat. The aim of *jujutsu* is to use the opponent's energy against them, rather than directly opposing it. This is achieved through holds and techniques to throw an opponent off balance.

Kenjutsu

Kenjutsu ('the art of the sword') involves the practice of swordsmanship. During the Edo period, the development of the bamboo practice sword and protective armour allowed full sparring with reduced risk of harm. This came to be known as *kendo* ('the way of the sword').

Key skill worksheet
Identifying continuity & change: Sumo wrestling

Sumo wrestling

Sumo wrestling, an ancient temple ritual, became a form of professional sporting entertainment during the Edo period. It is still a national sport today. A sumo tournament is lengthy, and can go on for 15 days. During that time, the sumo wrestler will carry out matches against opponents using many of the 70 possible categories of moves.

Source 11 A sumo fighter is usually very big, with a large belly around which he wears a ***mawashi*** belt that indicates his rank. This sumo tournament is taking place in Tokyo.

15.12 CHECK YOUR LEARNING

Review and understand

1 **Describe** the art of *bonsai*.

2 **Identify** two practices related to Zen Buddhism.

3 **Identify** the festival held on 3 March each year involving Japanese dolls.

Apply and analyse

4 **Distinguish between** *jujutsu* and *kenjutsu*. Remember, when you distinguish between two things, you need to explain how they are different.

Evaluate and create

5 **Research** the woodblock print created by Hokusai titled *The Great Wave off Kanagawa*. Explain why and how it has become so significant to Japan. Use the 5Rs (see page 212 of 'The history toolkit') to help you.

6 Evaluate the most important cultural achievement that occurred during the Edo period. **Justify** (give reasons for) your answer.

7 **Research** the steps and create a piece of *origami*. Share your artwork with your class.

15.13 The end of the shogunate

In this topic, you will:

- explore the influence of foreign interaction on the development of Japan and decline of the Shogunate era.

In the mid-1800s, countries around the world began to push for Japan's restrictions on foreign trade to be lifted. One such country was the United States.

Japan opens up

On 8 July 1853, four black ships led by Commodore Matthew Perry of the US navy anchored at Edo Bay (now Tokyo Bay). Perry had arrived in Japan to persuade the Japanese to open their borders and trade with the United States. He carried with him a letter from the president to the emperor of Japan.

Because Japan had been closed to the outside world for so long, the Japanese had never seen steamships before. They thought the ships were 'giant dragons puffing smoke', and were shocked by the size of the ships and the number of guns they carried. In total, the four ships carried around 1000 men and 61 guns.

Source 12 A Japanese artist's impression of Commodore Matthew Perry, drawn in 1856

Perry was an experienced naval officer who, at the age of 60, had enjoyed a long and distinguished career. He knew that this mission to Japan would be one of his most significant assignments. After dropping anchor in Edo Bay, Perry waited. He refused to receive low-ranking diplomats, instead insisting on seeing only the most senior representatives of the emperor.

He refused demands to leave, and threatened the Japanese by fixing his weapons on the capital. The Japanese Government realised that the country was in no position to defend itself against a foreign power, and that Japan could not retain its policy of isolation without risking war.

Source 13 A Japanese artist's impression of the black ships entering Edo Bay, created in 1853

On 31 March 1854, after weeks of diplomatic talks, Perry received what he had been working towards – a treaty with Japan, known as the Convention of Kanagawa. It was signed by Perry and the Tokugawa shogunate. In the years that followed, Japanese ports opened to American trade; and after more than 200 years of isolation, Japanese society began opening to the world.

Many Japanese people resented the increased power and position of the Westerners that followed Perry's arrival. The *daimyo* began to lose faith in the shogun who was supposed to suppress 'foreign barbarians'. There was talk of forcing his resignation. As a result, the power of the shogun decreased. In 1868, Shogun Tokugawa Yoshinobu handed back power to Emperor Meiji. This change of how Japan was governed was known as the **Meiji restoration**.

On 3 January 1869, Emperor Meiji formally declared the restoration of his power.

Meiji restoration
a period in Japanese history from 1868 to 1912 when the last shogun was overthrown and the emperor regained control over Japan

Key skill worksheet
Determining historical significance: Commodore Matthew Perry

The Meiji restoration

The handing over of power from the shogun to the emperor, and the moving of the Imperial Court from Kyoto to Edo, represented the return of imperial rule in Japan. Edo was renamed Tokyo (meaning 'Eastern capital'). Emperor Meiji quickly made his mark by establishing Shinto as the state religion. This reinforced his power, because under Shinto he was viewed as a living god.

In 1871, it was declared that all provinces were to be returned from the *daimyo* to the emperor. These 300 provinces were combined to form 75 larger areas known as prefectures. Each prefecture came under the control of a state-appointed governor.

smelters
places where metal is extracted from its ore by a process that involves heating and melting

Modernising and Westernising Japan

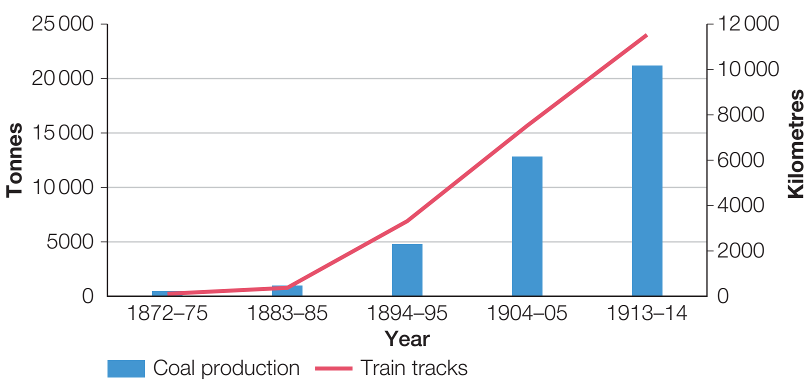
Source 14 An artist's impression of the Tokyo terminus of the new Tokyo–Yokohama railway, built in 1872 with the aid of foreign engineers

Emperor Meiji moved rapidly to modernise Japan. Western fashions and ideas were quickly adopted, often at the cost of traditional practices and beliefs. The military was strengthened, with the adoption of Western weapons and a modern navy. The government instituted nationwide military conscription (mandatory military service) in 1873, ordering that every man would serve for four years in the armed forces upon turning 21. Samurai were no longer allowed to walk about town bearing swords; instead, many became officers in the newly modernised army and navy.

A new constitution was written under the guidance of Prince Ito Hirobumi. It was adopted in 1889. A period of rapid development and industrialisation followed.

Japan began to aggressively expand overseas, winning wars with China in 1894–95 and with Russia in 1904–05. Japan gained the island of Taiwan from China in 1895, and annexed (took control of) Korea in 1910, becoming a powerful new force in the region.

The industrialisation of Japan required a huge increase in production capabilities. Shipyards, iron **smelters** and spinning mills were built. Coal was in great demand to power factories, trains and ships (see Source 14). Industrial centres grew quickly with the migration of workers from the countryside. A national railway system was also built to connect industrial regions with ports (see Source 14). Trade also developed rapidly, thanks to a series of treaties signed with Western nations.



Source 15 Industrialisation in Japan, 1872–1914

Analysing perspectives

Analysing perspectives gives us an insight into what a person values or prioritises in their life. We can analyse perspectives from primary sources (that is, from people who were there at the time) or from secondary sources (that is, from historians writing about the past).

When reading sources, it is important to ask questions about who created the source and why. Think about the **context** (situation) of when the source was produced, the **opinions** (views) expressed and what messages are **inferred** (suggested) in the source.

Read the extract in Source 16. It has been annotated to show you how to extract the information on context, opinion and inference.

Log onto your obook pro to read more perspectives and to complete the key skill worksheet 'Analysing perspectives'.

For more information on this key skill, refer to page 213 of 'The history toolkit'.

KEY SKILL
Analysing sources

Key skill worksheet
Analysing sources: Analysing perspectives

Source 16 Proclamation of Empress Haruko, 1887

Now we can no longer restrict ourselves to bowing from a kneeling position … Moreover, if we look at contemporary Western women's wear, we find that it combines a top or jacket and a skirt in the manner of our ancient Japanese system of dress.

This is not only suitable for the formal standing bow but also convenient for action and movement and makes it only natural to adopt the Western method of sewing.

Inference: We will have more freedom to move

Context: Bowing suggests a royal context

Context: The West is more modern

Inference: There are similarities between the West and Japan

Opinion: These phrases aim to persuade the reader to agree with the point being made

15.13 CHECK YOUR LEARNING

Review and understand

1 **Identify** two things Emperor Meiji did to quickly demonstrate his authority.
2 How did the role and status of the samurai change under Emperor Meiji?
3 **Identify** the task that brought US Commodore Matthew Perry to Japan.

Apply and analyse

4 Why do you think the Imperial Court moved from Kyoto to Edo? **Explain** your answer.
5 **Explain** why coal became important in the industrialisation of Japan.
6 **Examine** Source 15.
   a Why do you think the development of the rail system was important for trade?
   b **Analyse** the change over time. What does this tell you about the process of industrialisation in Japan?

Evaluate and create

7 Read Source 16. What does this short extract reveal about the ways in which Japan began changing as a result of contact with the West?
8 Think about what you have learnt about the shogunate period of control in Japan. Overall, do you think it was a period that produced gains for Japan, or one that slowed down its development? **Justify** (give reasons for) your response.

15C RICH TASK

Quizlet
Revise the key terms you have learnt so far.

The rise and fall of the shoguns

In 1868, the rule of the shoguns came to an end, and power was handed back to the emperor. After being somewhat sidelined for a significant part of Japan's history, it was the emperor who outlasted the shoguns and who has continued to hold power to the present day.

The fall of the shoguns was not something that happened overnight, but was rather the result of many internal and external changes in Japan at the time. It is useful to look at various aspects of life under the shoguns to decide when they were at their peak, and when the decline started.

Historians have the benefit of hindsight to evaluate the changes that occurred during this period. When evaluating a significant place, person or development, they must always consider its strengths and weaknesses. For example, it was in the Shogunate era that the current capital of Japan, Tokyo, was established. Historians would undoubtedly consider this as a strength of the Shogunate era in Japan.

Yet life under the shoguns also meant that Japan was unaware of the Industrial Revolution occurring in the Western world during the eighteenth century. The foreign policy of *sakoku* meant that there was no trade with the outside world, apart from some limited contact with China and the Netherlands. Historians may consider this a weakness, as it stopped any technology, philosophy or religion from the West influencing developments in Japanese society.

Source 17 contains some questions that can be used to begin your evaluation of the decline of the shoguns. Just as a historian would, discuss the questions with others to help form your own opinions about the rise and fall of the Shogunate era and its level of influence over time.

Has the Shogunate era heavily influenced the culture of modern-day Japan?

Did the samurai *bushido* code instill a code of conduct that is still present in Japanese culture today?

Was the social hierarchy beneficial for all people, or did it stop some people from reaching their full potential?

Did the problems caused by deforestation contribute to the decline in the power of the shoguns?

Did the *sakoku* foreign policy contribute to the decline of the shoguns, or did it help them to preserve Japanese traditions?

Source 17 This historian is thinking of key questions to help guide and evaluate their research.

KEY SKILL
Communicating & reflecting

Writing an evaluative essay

An evaluative essay is a formal written document that presents a series of reasoned arguments with supporting evidence. It may also be called an argumentative essay. It usually addresses a stimulus. A stimulus could be a question, quote, source, event or issue that you are presented with, and that you need to refer to throughout your written response.

In history, an evaluative essay is similar to participating in a debate. You may prefer one side of the argument, but it is important to acknowledge that there is another viewpoint to make sure you are providing a proper evaluation of the stimulus.

Follow these steps to start planning an evaluative essay:

Step 1 Read your essay prompt carefully. Are there any words, phrases or images you don't recognise? Take the time to find out what they mean.

Step 2 Decide on your viewpoint. In an essay, your viewpoint is known as your 'hypothesis'. This is a fancy term for your opinion, which you will maintain throughout the essay.

Step 3 Choose two strong arguments to support your hypothesis. You might already have some good examples in your notes from class. Otherwise, conduct some research.

Step 4 Choose one alternative argument that shows a different side to your hypothesis. By doing so, you will avoid bias and show your understanding that two sides to the debate exist.

Step 5 Decide on the order of your arguments. In history, your essay can follow the chronological order of events as they happened. Or you may prefer to discuss the arguments you support first, and then the counter-argument last.

For more information on this key skill, refer to page 218 of 'The history toolkit'.

Practise the skill

1 Read this essay prompt closely:

'The fall of the shoguns was caused by their failure to adapt to change.'

Follow steps 1 to 5 as outlined above to plan how you will respond to this prompt.

2 Now that you have finished planning, write an essay that answers the prompt in question 1.

As a guide, try to keep your response to 750 words. Remember, there are detailed instructions on how to write paragraphs that include evidence on page 219 of 'The history toolkit'.

3 Following the instructions on page 205 of 'The history toolkit', provide a list of references for the evidence you used to write your response.

Extend your understanding

1 **Create** a timeline showing the events, leaders and developments that you believe caused the progress of Shogunate Japan to improve or decline.

a Choose seven to ten dates to include on your timeline.

b Present your timeline on a poster. Include some images relevant to any of the dates you have chosen.

2 **Rank** the events on your timeline from the most important to the least. How different is your ranking to the chronological order of events?

3 Display your posters around the classroom. **Compare** your posters with those of your classmates. Did you choose similar or different dates? Why do you think this is?

15 CHAPTER REVIEW

Review questions

15A What led to the rise of the shoguns?

1 **Define** *kami*. The followers of which religion believe in *kami*? (2 marks)

2 **Analyse** how the geography of Japan influenced the location of early Japanese settlers. (4 marks)

3 **Apply** the concept of cause and effect to explain the relationship between the building of the palace at Heian-kyo and the fading power of the emperor. (4 marks)

(Total: 10 marks)

15B How was Japanese society organised during the rule of the shoguns?

1 **Evaluate** the power of the *daimyo* in Shogunate Japan. What were the strengths and weaknesses of this role? What is your overall impression of it? Why? (10 marks)

(Total: 10 marks)

15C How did Japan change during the rule of the shoguns?

1 **Identify** two reasons why Christian missionaries were considered a threat to Japan. (2 marks)

2 **Analyse** the cause and effect of the forestry management policy put in place in 1666. (4 marks)

3 **Analyse** the significance of the arrival of US Commodore Matthew Perry on the future of Japan. Use the 5Rs (see page 212 of 'The history toolkit') to help you. (4 marks)

(Total: 10 marks)

Review activity

Read Source 18 and answer the following questions.

Laws for the Military Houses

Source 18 is a summary of some of the *Laws for the Military Houses* imposed on the warrior classes in 1615 by Shogun Tokugawa Ieyasu. These provided a code of conduct for honourable behaviour.

Source 18

- The samurai class should devote itself to pursuits appropriate to the warrior aristocracy, such as archery, swordsmanship, horsemanship, and classical literature.
- Amusements and entertainments are to be reasonable and expenses not excessive.
- The *han* (feudal domains) are not to harbour fugitives and outlaws.
- Domains must expel rebels and murderers from their service and from their lands.
- *Daimyo* are not to engage in social interactions with the people (neither samurai nor commoners) of other domains.
- Castles may be repaired, but such activity must be reported to the shogunate. Structural innovations and expansions are forbidden.
- The formation of cliques for scheming or conspiracy in neighbouring domains must be reported to the shogunate without delay, as must the expansion of defences, fortifications or military forces.
- Marriages among *daimyo* … must not be arranged privately.
- *Daimyo* must present themselves at Edo for service to the shogunate.
- Conventions regarding formal uniform must be followed.
- Samurai throughout the realm are to practise frugality.

Extract from *Laws for the Military Houses,* 1615

1. **Identify** what type of source this is (that is, primary or secondary). (1 mark)
2. Using empathy, **outline** the perspectives of each of the following social groups towards this law:
   - **a** a samurai living by the *bushido* code.
   - **b** a *daimyo* and his family. (2 marks)
3. Choose two of the laws and **explain** how they helped to hold power in the Tokugawa shogunate. (6 marks)
4. **Compare** these laws to modern-day regulations, rules or laws within society – within the home, school, local area or nation. **Explain** the continuity and change in the laws presented above and how they may apply today. (7 marks)
5. **Analyse** the source using the 'DAMMIT U' acronym (see page 216 of 'The history toolkit') to structure your response. (4 marks)

(Total: 20 marks)

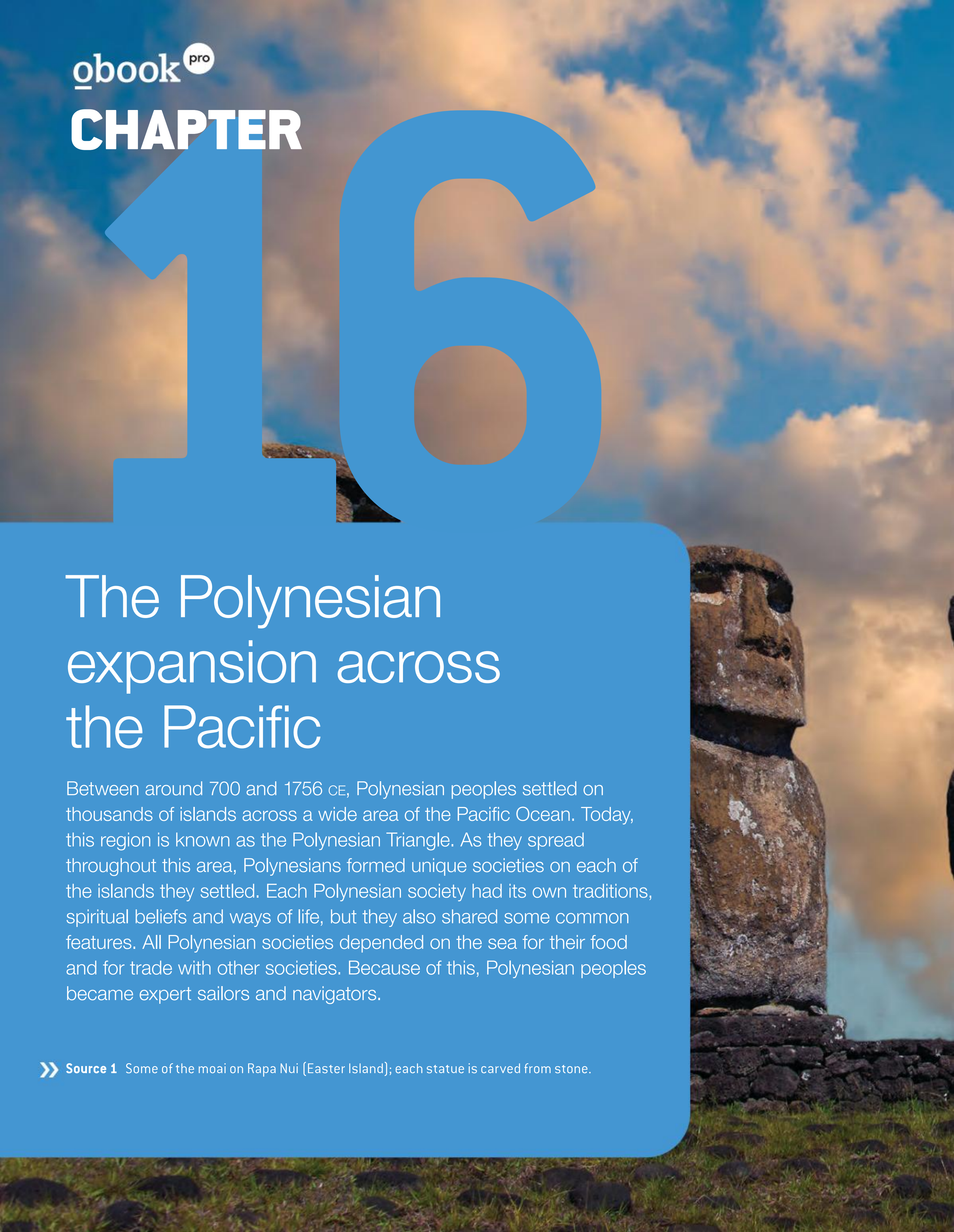
Check your Student obook pro for these digital resources and more:

Student book questions
Chapter 15

Key skill worksheet
Communicating & reflecting: Chapter 15

Quizlet
Play a game of Quizlet on Japan under the shoguns.

Chapter review quiz
Chapter 15



CHAPTER 16

The Polynesian expansion across the Pacific

Between around 700 and 1756 CE, Polynesian peoples settled on thousands of islands across a wide area of the Pacific Ocean. Today, this region is known as the Polynesian Triangle. As they spread throughout this area, Polynesians formed unique societies on each of the islands they settled. Each Polynesian society had its own traditions, spiritual beliefs and ways of life, but they also shared some common features. All Polynesian societies depended on the sea for their food and for trade with other societies. Because of this, Polynesian peoples became expert sailors and navigators.

Source 1 Some of the moai on Rapa Nui (Easter Island); each statue is carved from stone.

16A
How did Polynesians spread across the Pacific and where did they settle?

16B
How was society organised in Polynesian villages?

16C
What developments influenced life in Polynesia?

16.1 The Polynesian expansion across the Pacific: a timeline

Sequence this!
Key events in the Polynesian expansion across the Pacific


A Māori man performing a *haka*

c. 2000–1500
The first travellers begin to move from Asia through the islands of the Pacific Ocean, moving east towards what becomes known as the Polynesian Triangle. Tonga is settled.

c. 1500
Evidence from discoveries of Lapita pottery suggests that the ancestors of Polynesian peoples reach the Bismarck Archipelago, north of New Guinea.

c. 1000
Polynesians move further east and settle the islands of Hawaii and Rapa Nui (Easter Island). The Rapa Nui people make huge stone statues called moai.

c. 1000
Samoa is settled.

2000 BCE — 1500 — 1000 — 1 CE — 500

c. 1000
Rapa Nui's environment suffers from overuse. Deforestation starts.

c. 950
Māori myth suggests that Chief Kupe sails to what is now known as New Zealand and names it 'Aotearoa'.


Lapita pottery

Source 1 A timeline of some key events in the Polynesian expansion across the Pacific

A nineteenth-century artist's impression of the arrival of the Great Fleet in Aotearoa (New Zealand)

***c.* 1100**
Māori myth suggests that the Polynesian explorers Toi and Whatonga arrive in Aotearoa.

***c.* 1350**
According to myth, the 'Great Fleet' arrives and Māori people begin to settle in Aotearoa.

***c.* 1400**
Most species of the moa, a flightless bird of Aotearoa, are extinct after being hunted as a source of food.

***c.* 1500**
Food begins to run out on Rapa Nui. Fighting starts. The last moai is erected. A new religion begins, called the Birdman Cult.

***c.* 1600**
As resources run out on Rapa Nui, there is warring between clans, and the people practise cannibalism.

***c.* 1642**
The Dutch explorer Abel Tasman claims Aotearoa for Holland. It is given the name 'New Zealand' by a Dutch map-maker.

***c.* 1722**
The first European contact is made with the Rapa Nui people. Dutch admiral Jacob Roggeveen gives Rapa Nui the name 'Easter Island'.

***c.* 1744**
The British explorer Captain James Cook visits Rapa Nui.

***c.* 1769**
Cook claims New Zealand for Britain.

1000 — 1500 — 2000 CE

Moas were hunted to extinction.

16.1 CHECK YOUR LEARNING

Review and understand

1 **Identify** the English names for the islands Rapa Nui and Aotearoa. Who renamed these islands?

2 What were moa? What happened to them?

Apply and analyse

3 **Examine** the timeline to identify the year each of the following islands was discovered by Polynesians. Place them in chronological order (from earliest to most recent):
- Rapa Nui
- Hawaii
- Aotearoa
- Tonga
- Samoa.

4 **Explain** why the people of Rapa Nui practised cannibalism when they did.

Evaluate and create

5 **Research** Lapita pottery and summarise your findings. In your writing, discuss the link between Lapita pottery and the Polynesian expansion across the Pacific.

16.2 The geography of Polynesia

In this topic, you will:

- explore how the physical features of Polynesia influenced its development.

Polynesia is a region of the Pacific Ocean, within the larger region of Oceania. Oceania includes all the islands in the central and south Pacific Ocean, while Polynesia includes all the islands within what is generally called the Polynesian Triangle. The three corners of the triangle are Hawaii in the north, Rapa Nui (Easter Island) in the east and New Zealand in the south. Samoa, Tuvalu and Tonga mark the triangle's western edge.

THE POLYNESIAN TRIANGLE

Source 2

Source: Oxford University Press

There are many different natural environments in Polynesia – from tiny islands with tropical climates, to the heavily forested South Island of New Zealand with its snow-capped peaks. Within Polynesia, there are many atolls, which are ring-shaped coral reefs or islands. Atolls do not have much vegetation. In the past, Polynesians on these atolls mainly lived by fishing, growing crops such as yams and taro, and raising animals such as pigs, dogs and chickens. By contrast, Hawaii, New Zealand and remote Rapa Nui are volcanic islands, not coral islands. Societies in these places developed agriculture on a much larger scale because of the rich volcanic soil. They also lived by hunting, fishing and gathering edible plants.

Source 3 An atoll in the Tahiti Islands

Source 4

At 6 a.m. we weighed and stood out of the Bay, which I have named Poverty Bay, because it afforded us no one thing we wanted … It is in the form of a Horse Shoe, and is known by an Island lying close under the North-East point. The 2 points which form the Entrance are high, with Steep white Cliffs … The Depth of Water in this Bay is from 12 to 5 fathoms [a fathom is 1.8 metres], a sandy bottom and good Anchorage, but you lay open to the winds between the South and East … The shore of this Bay, from a little within each Entrance, is a low, flat sand; but this is only a Narrow Slip, for the face of the Country appears with a variety of hills and Vallies, all cloathed with woods and Verdure [greenery], and to all appearance well inhabited, especially in the Vallies leading up from the Bay, where we daily saw Smoke at a great distance inland, and far back in the Country are very high Mountains … the South-West point of Poverty Bay, which I have named Young Nicks head (after the Boy who first saw this land).

Extract from Captain James Cook's *Endeavour* journal, written on 11 October 1769 upon his first landing in New Zealand

Source 5 Te Kuri (Young Nicks Head) at the north-eastern tip of New Zealand

Analyse this!
Extract from Captain James Cook's *Endeavour* journal

16.2 CHECK YOUR LEARNING

Review and understand

1 **Identify** the three locations that form the points of the Polynesian Triangle.

2 **Identify** at least two different climates present on the islands within Polynesia.

Apply and analyse

3 Use Source 2 to write a statement about the geographical location of Polynesia. **Compare** the size and location of New Zealand with other islands in Polynesia.

4 Sources 3 and 5 show the natural environments of different parts of Polynesia. **Summarise** how you think the different environments affected people's ways of life.

Evaluate and create

5 Study Sources 4 and 5.

a How reliable is Source 4 in describing the environment? **Justify** (give reasons for) your response with specific examples.

b In 2019, a dual name was made official for Tūranganui-a-Kiwa (Poverty Bay), acknowledging both the Māori culture and the heritage of Captain Cook's arrival. This change has sparked debate within the community. In pairs, **discuss** the arguments the community may have about this name change.

6 **Research** the climates of Samoa, Hawaii, New Zealand and Rapa Nui. Create a table to summarise your findings, comparing how the climates of these places are similar and how they are different.

See, think, wonder
Look at Source 6.
- What do you see?
- What do you think?
- What do you wonder?

Source 6 A moai on Rapa Nui, with the volcanic crater Rano Raraku in the background

16.3 Theories about Polynesian expansion

In this topic, you will:

- » learn about evidence for the origins of the Polynesian settlements
- » explore the historical debate regarding the expansion of the Polynesian societies.

The Polynesian expansion across the Pacific took place over a long period of time. Historians do not always agree on exactly how or when the Polynesians spread throughout the area. Most historians do believe, however, that the Polynesian expansion happened over a period of more than 2000 years, and covered a large part of the Pacific region.

Many disagree on where the Polynesian peoples came from – some historians have even tried to copy the sea voyages they think the Polynesians undertook in order to prove their theories.

East or west?

One of the biggest disagreements is which direction the Polynesians came from – east or west. Most historians agree that the Polynesians originated from South-East Asia, but other theories suggest origins in the opposite direction (west), from South America.

Who is correct? According to one argument, the travellers came from an area such as modern-day Peru – floating across the ocean on canoes and rafts created from the balsa wood common to that area. The people who support this idea argue that the regular wind patterns and ocean currents would enable this type of travel, while making travel in the opposite direction a great deal more difficult. They also sometimes suggest that there are similarities between Aztec, Inca and Mayan stone sculptures from South America and the stone statues of Polynesia, such as the **moai** on Rapa Nui.

moai
huge human figures created from a single block of stone, present on Rapa Nui

Source 7 An Aztec stone sculpture from Central Mexico, which has some similarities to the moai of Rapa Nui

Source 8 Moai on Rapa Nui

Thor Heyerdahl

In 1947, a Norwegian adventurer named Thor Heyerdahl carried out a risky voyage in an attempt to prove that the Polynesians had travelled west – from South America – across the Pacific. Heyerdahl felt that the theory of movement from the west to east was wrong. He argued that the strong currents and winds that blow from east to west in the Pacific would have made such travel almost impossible. Heyerdahl created a balsa wood raft called the *Kon-Tiki*, which he used to drift from Peru to the Tuamotu Islands – a voyage of nearly 7000 kilometres. As the Tuamotu Islands are on the eastern fringe of Polynesia, he argued that it was highly likely that this was the way that the early Polynesians had travelled.

There is no solid evidence that would support this theory, although many people consider that it is a logical explanation. Heyerdahl's proposal was valuable because it questioned established ideas. His voyage also helped to show that there was a lack of solid archaeological evidence for the 'west to east' movement theory, and encouraged historians to begin gathering evidence to support their different theories.

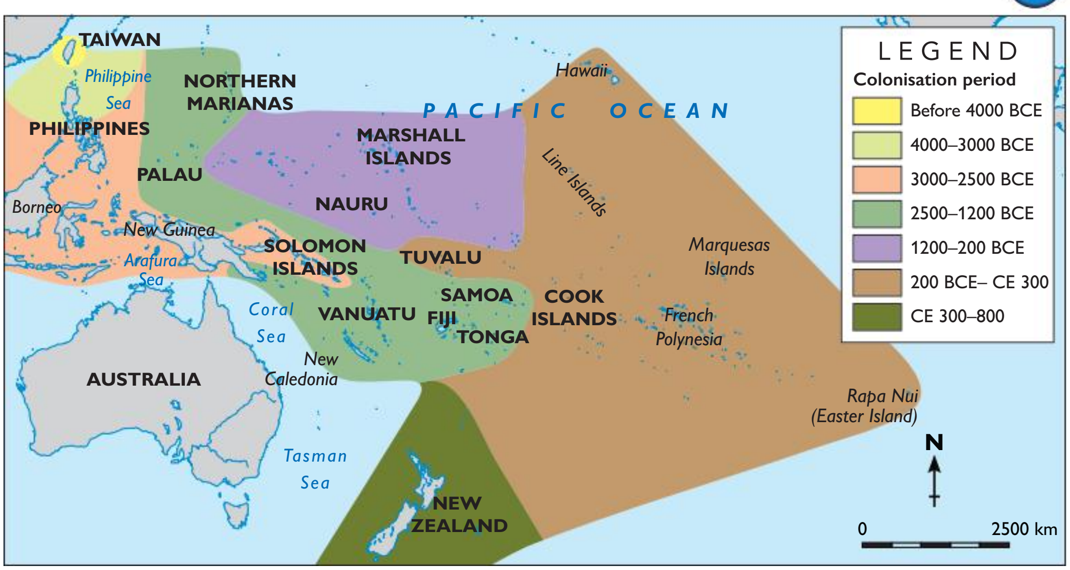
For more information on this key concept, see page 201 of 'The history toolkit'.

KEY CONCEPT
Evidence

THOR HEYERDAHL'S VOYAGE

Source 9 Source: Oxford University Press

ASIA–PACIFIC REGION: POLYNESIAN EXPANSION FROM THE WEST



Source: Oxford University Press

Source 10 Most historians now believe this is the order in which islands across the Pacific were settled by Polynesians.

Settlers from the west

Despite Heyerdahl's voyage, more recent archaeological evidence strongly supports the view that the Polynesians came from the west. Most people now believe that the early ancestors of Polynesian people travelled from the Malay Islands and along the coast of New Guinea. From New Guinea, they would have moved east along the Solomon Island chain, into Vanuatu. It is thought that these initial trips were made from 1500 BCE onwards, with the travellers using double-hulled canoes to cross the vast distances between land masses.

The early settlers then moved on into modern-day Polynesia, taking with them domestic animals and plants. From Vanuatu they travelled east to the Cook Islands, then on to the Society Islands, the Marquesas and across the huge sea gap to Hawaii, Rapa Nui and down to New Zealand. These voyages possibly took place until at least 1000 CE.

I used to think, now I think

Reflect on your learning about the different Polynesian peoples who settled across the Asia–Pacific region and complete the following sentences.

- I used to think ...
- Now I think ...

What has changed in your understanding?

Evidence of Polynesian expansion

Historians and other experts have used a variety of sources as evidence to investigate Polynesian expansion.

Polynesian languages

One way of working out how different Polynesian peoples are historically related is to study their different languages and look for similarities. Among the earliest recorders of these similarities were the British explorers Joseph Banks and Captain James Cook. During their travels through Polynesia in the eighteenth century, Banks and Cook listed and compared languages from Tahiti and New Zealand. They also looked at the languages used by people in Indonesia and Melanesia. They found that all of these languages were connected, meaning that there was a link from Polynesia back to South-East Asia. In other words, the Polynesians had travelled east.

Source 11 Polynesian languages are closely related and contain many similar words.

English word	Tahitian word	Hawaiian word	Māori word
person	ta'ata	kanaka	tāngata
eye	mata	maka	mata
wind	mata'i	makani	matangi

Source 12 An artist's impression of Polynesian voyagers sailing towards New Zealand

Oral histories

Anthropologists have studied the strong oral traditions of Polynesian societies to help determine the origins of Polynesian peoples. Ancient Polynesian societies did not leave behind written records. However, stories that have been passed down through many generations offer valuable clues about how Polynesia was settled. For example, traditional stories from the Māori – the indigenous Polynesian people of New Zealand – connect the canoes that settled New Zealand to a legendary place called Hawaiki, which may be a real island or a mythical place. Hawaii has legends and stories that link it to 'Kahiki', which many believe to be the islands of Tahiti.

anthropologists
people who study human societies, customs and beliefs

DNA research

Most of what we know about Polynesian expansion is based on the work of archaeologists. These specialists study the **artefacts** of the past as evidence of people's daily lives. They look at objects that people used every day, such as weapons, cooking pots and tools. Archaeologists increasingly rely on scientific techniques, such as radiocarbon dating and DNA testing.

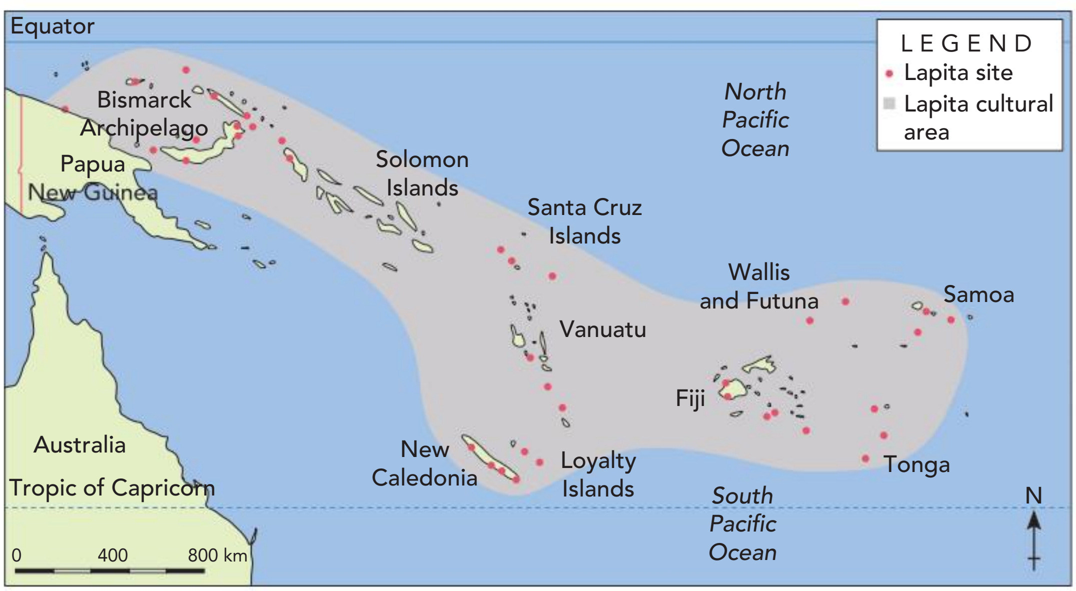
artefacts
objects, small or large, that have been made or changed by people

DNA is a genetic code inside the nucleus of every cell in the human body. Each person's DNA is slightly different. We inherit our DNA from our parents: half each from our biological mother and father. By comparing the DNA of different people across the world, scientists can tell how closely or how distantly they are related.

As a result of DNA testing of Polynesian peoples, most historians now accept that the ancestors of the Polynesians came from South-East Asia and from China more than 6000 years ago. The ancestors of the Polynesians (and Melanesian) peoples were called the Lapita. From South-East Asia and China, they made their way south, settling first in what is now Indonesia. They then settled on the Bismarck Archipelago, a group of islands north of New Guinea. The pottery of the Lapita people has been found in sites across Polynesia, and indicates the movement of people from Melanesia to Polynesia.

Quiz me!
A quick quiz on theories about Polynesian expansion

SITES WHERE LAPITA POTTERY HAS BEEN FOUND



Source: Oxford University Press/Encyclopedia Britannica

Source 13 The Lapita people originally settled on the Bismarck Archipelago.

Source 14 An example of Lapita pottery

KEY CONCEPT
Evidence

The sweet potato

One of the greatest puzzles in the debate about Polynesian origins has come from one of their foods, the sweet potato. Most Polynesian foods are of South-East Asian origin, supporting the idea that the Polynesians came from the west. But sweet potatoes come from Peru.

So how did the sweet potato arrive in Polynesia? The ocean distance between South America and eastern Polynesia is vast, so it seems highly unlikely that the sweet potato arrived because of accidental drifting of plants or seeds.

Even more surprisingly, research has shown that the first islands to have sweet potato were not the ones closest to Peru, such as Rapa Nui. Instead, sweet potato probably arrived first in the Marquesas Islands.

Several theories exist. Some scholars suggest that the sweet potato arrived in Polynesia because of trade, either with Peruvians or with Chinese explorers. Both of these ideas have little evidence to support them. More commonly accepted is the idea that the Polynesians sailed east to Peru and returned with the sweet potato around 1000 years ago.

For more information on this key concept, see page 201 of 'The history toolkit'.

Source 15 Kumara is the Māori name for this variety of sweet potato.

Document
Pacific region: Blank map

Source 16 An example of a Māori carving

16.3 CHECK YOUR LEARNING

Review and understand

1 **Identify** three reasons why many historians think the Polynesians spread into Polynesia from the west.

2 **Describe** the key points of Thor Heyerdahl's theory that the Polynesians originally came from South America in the east. Is there enough evidence to support this theory? Explain your answer.

Apply and analyse

3 **Explain** why the existence of the sweet potato in Polynesia is such a mystery for historians. How does it challenge accepted theories of Polynesian expansion?

4 **Summarise** why the comparison of languages was useful for historians trying to work out where the Polynesians came from.

Evaluate and create

5 **Research** a traditional Māori story – or a story from another Polynesian culture – about their ancestors first arriving on the island they made home. Consider the evidence this story provides for historians. Does it tell us anything about the beliefs of the people, the voyages their ancestors made, or contacts with other peoples?

6 On a blank map of the Pacific region, mark the islands that were settled by Polynesians. (There is a blank map available on your obook pro.) Then show the direction of travel of the people who first settled Polynesia. Do the same for the opposing theory about the origin and spread of the Polynesians. In groups, **discuss** the evidence for each theory.

16.4 Polynesian journeys across the Pacific

In this topic, you will:

» examine the importance of navigation to establishing settlements in Polynesia.

Worksheet
Navigating using the stars

The story of how Polynesian people settled the Pacific region is one of history's epic tales of exploration and adventure. The Polynesians were skilled boatbuilders, navigators and sailors who saw the ocean as an important part of their world. They had many techniques for making their astonishing sea voyages. They closely observed the position of the stars, the presence of birds, the direction of the wind and the shape of the waves.

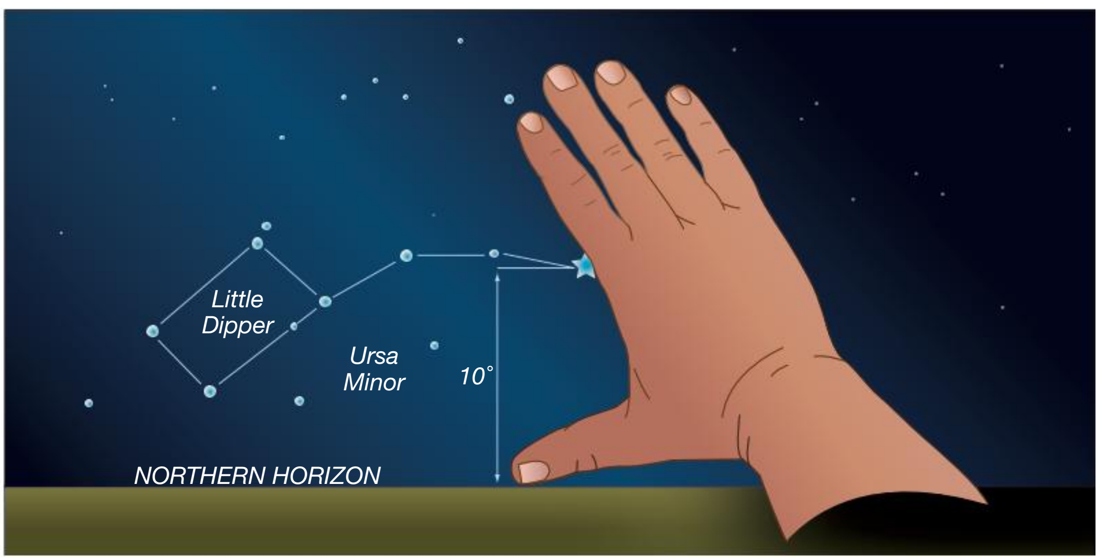
Navigation

Without modern compasses or satellite technology, the Polynesians found their way across the Pacific. What we know about traditional navigation comes in part from early European observations of Polynesian sailors. We also rely on Polynesian oral traditions for information about how they achieved their journeys.

Using the stars

The Polynesians used the stars to tell them where they were and which direction they should go in. Navigators knew by heart the positions of important stars in relation to their homelands. They also knew how the patterns of the stars would change with the time of year, or as they travelled to new places.

Stars were also useful for finding latitude (the north–south position of a point on the Earth's surface). Measuring the height of the star Polaris or the Southern Cross above the horizon using their hands, Polynesian navigators could tell roughly how far north or south of the Equator they were (see Source 17).



Source 17 Estimating latitude by placing a hand against the horizon to measure the height of the star Polaris

See, think, wonder
Look at Source 17.
- What do you see?
- What do you think?
- What do you wonder?

Using birds, wind and waves

Sighting a bird would tell Polynesian navigators that they were near land. If it was a sea bird, the distance could be as much as 100 kilometres, but other birds were only seen closer to home. Polynesian navigators could also tell in which direction land lay, because at sunrise birds generally fly away from land to hunt out at sea. At sunset they usually fly home, towards land.

Wind and waves also gave them clues about nearby land. The nineteenth-century English missionary William Wyatt Gill recorded that the Cook Islanders recognised 32 different winds that regularly appeared from particular directions. Using a wind compass could help navigators find their way. However, this method was not as reliable as navigating by the stars.

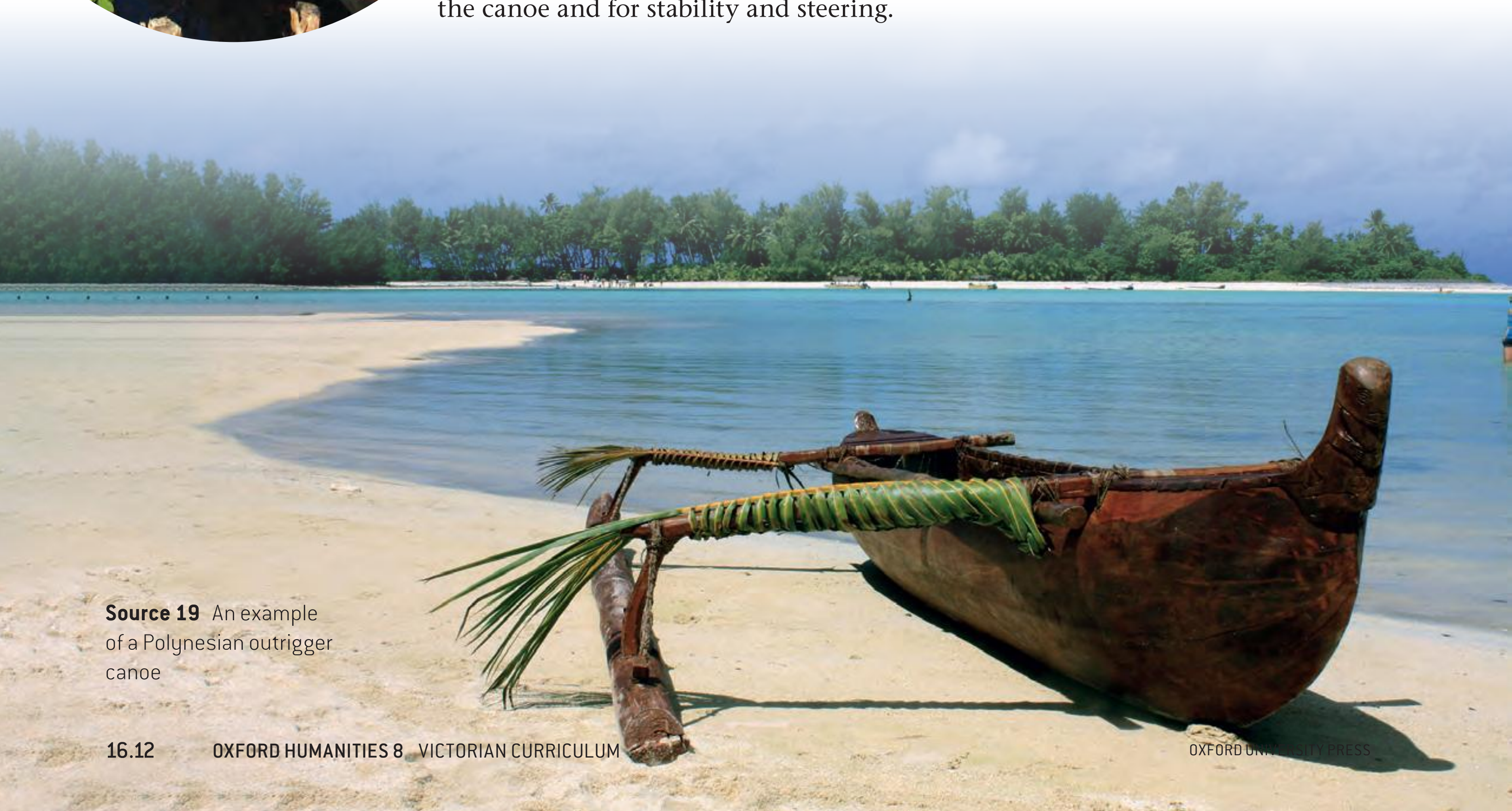
Wave patterns change near islands, and this also helps with navigation. A long ocean wave will bend around an island and some of the wave will bounce back off the shore. This disturbs the regular wave pattern of the ocean. The larger the island is, the greater the disturbance of the wave pattern. By closely observing the shape of the waters, experienced Polynesian navigators could detect land tens or even hundreds of kilometres away.

Source 18 An example of a dugout canoe

Boats

The Polynesians used many types of vessels to cross the waters of the Pacific Ocean. Rafts were widely used to transport goods near coastal areas. But the most important type of craft for sea voyages was the canoe.

The simplest canoes were dugouts, which were made by hollowing out a log. Other canoes were made by joining planks together with plaited grass or fibre and waterproofing them with sap or coconut fibre. Sails could be made by weaving together palm leaves. Paddles were used both to propel the canoe and for stability and steering.



Source 19 An example of a Polynesian outrigger canoe

An **outrigger**, or float, could be added to a canoe to improve stability. Likewise, joining two dugouts together made them less likely to capsize. Outriggers were usually connected to the main hull using crossbeams, and platforms could be built across the width of the boat to provide extra space for people and goods.

For longer voyages, or when larger numbers of people needed to be carried, the Polynesians used large double-hulled canoes. The largest of these were more than 30 metres long and could carry up to 300 people. This was useful for military purposes, such as attacking nearby islands. When Captain Cook visited Tahiti in 1774, he saw an enormous fleet of these canoes getting ready to raid their neighbours in Mo'orea. He estimated that there were about 160 double war canoes plus many smaller craft, carrying almost 8000 people in total.

To travel further, large canoes would carry fewer people and more supplies. An ocean-going double-hulled canoe with a small crew could travel hundreds of kilometres at sea.

outrigger
a wooden structure that is fixed to the side of a boat or ship in order to keep it steady in the water

Quiz me!
A quick quiz on Polynesian journeys across the Pacific

Source 20 An example of a simple Polynesian double-hulled canoe

Source 21 Replicas of Polynesian ocean-going double-hulled canoes; similar vessels would have been used by the early voyagers to cross the Pacific Ocean.

16.4 CHECK YOUR LEARNING

Review and understand

1 **Identify** four techniques that Polynesian navigators used to help them find land.

2 What is an outrigger? **Outline** how an outrigger works.

3 **Describe** three different types of Polynesian sea vessels.

Evaluate and create

4 Choose one of the Polynesian navigational methods. **Create** a presentation explaining how the method would have been used on Polynesian voyages. Include diagrams and images.

16A

RICH TASK

Quizlet

Revise the key terms you have learnt so far.

Origin myths of the Māori

Myths and legends are passed down through the generations. Myths are a way to share people's origins, their religious beliefs and their way of understanding the environment.

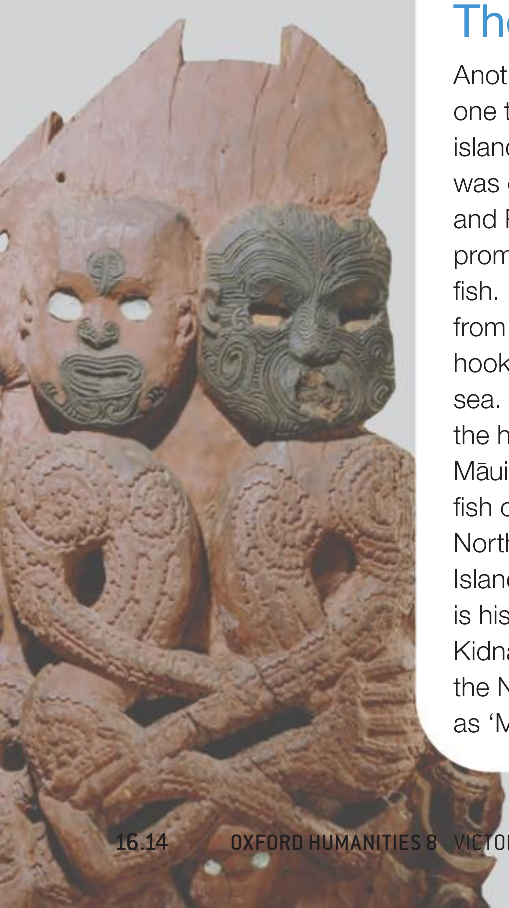
Many Māori myths feature gods performing incredible feats. But there are also Māori myths about the creatures around them and their importance to their lives. A number of myths feature whales and sharks. Whales and sharks were portrayed as guardians and often saved those in the sea from drowning. Sharks were an important part of the Māori diet and shark bone was used for carving. These myths in turn came to influence the arts and provided motifs that were used and easily understood by everyone in a tribe.

Two of the most important myths for the Māori were their creation myths – the legend of Rangi and Papa, and the legend of Māui.

The legend of Rangi and Papa

This legend tells the story of how day and night were formed. The Māori believed that the original creators were Rangi, who was the Sky Father, and Papa, who was the Earth Mother. In the beginning, Rangi and Papa clung together and their children lived in darkness. The children decided that Rangi and Papa needed to be parted. After great struggle, the children separated their parents and day was separated from night. Rangi cried at the parting, creating the oceans. The children of Rangi and Papa continued to argue. Their fighting caused the storms and the disruptions of the Earth, such as earthquakes and volcanic eruptions.

Source 22 A representation of Rangi and Papa, the Sky Father and Earth Mother in Māori mythology



The legend of Māui

Another traditional Māori legend, this one tells the story of the formation of the islands of Aotearoa (New Zealand). Māui was one of the grandchildren of Rangi and Papa. Māui decided to go fishing and promised to bring back a huge catch of fish. He prepared a special hook made from a magic jawbone. Smearing the hook with his blood, he threw it into the sea. Something immensely strong took the hook and nearly capsized the canoe. Māui pulled up the line, drawing a great fish out of the water. The fish became the North Island of New Zealand. The South Island is Māui's canoe and Stewart Island is his anchor stone. His hook is Cape Kidnappers headland in Hawke's Bay, on the North Island; the cape is also known as 'Māui's fish hook'.

Source 23 An illustration of Māui pulling up the North Island of New Zealand using a magic jawbone as a hook

KEY SKILL
Asking questions & conducting research

Identifying and locating relevant sources

Being able to locate relevant primary and secondary sources using the internet is an important historical skill. However, you need to keep in mind that not all information you find on the internet is necessarily true, accurate, reliable or useful. So, in addition to being able to find material online, you need to be able to evaluate its reliability, credibility and usefulness.

Use the following steps to apply this skill:

Step 1 Identify key words related to your topic and type these into a search engine, such as Google. (Do not type in sentences or questions.)

Step 2 Add further relevant key words to refine your search if you cannot find what you want.

Step 3 Look beyond the first page of results. The best results do not always appear first.

Step 4 Assess the reliability of each site by asking yourself the following questions:

- Who is the author or creator? If it is an individual, do they have their credentials listed (for example, a degree or a title)? If it is an organisation, is it a reputable one, such as a government or university department?
- What is the purpose of the website? Is it trying to inform, persuade or sell?
- Is the site objective? Is the author's point of view biased?
- Is the information accurate? Can the information be verified if you cross-check it with other sources of information?
- Does the site contain spelling mistakes or grammatical errors? (If so, this often indicates that the site is not particularly reliable.)
- Is the information current? Can you find evidence of recent updates?

For more information on this key skill, refer to page 203 of 'The history toolkit'.

Practise the skill

1 Conduct **research** online to locate and identify sources related to Māori origin myths.

2 Make a **list** of all the websites you visited and the sources you gathered.

  a Which of these sources do you think are the most reliable and relevant? How can you tell?

  b Which of these sources do you think are not reliable or relevant? How can you tell?

Extend your understanding

1 Do some more **research** on Māori mythology. Then find out about some of the myths or legends of another Polynesian society.

  a On a scale of 1 (not very) to 5 (very) how similar are the stories of these societies?

  b **Create** a poster showing the similarities and differences.

Source 24 The Disney film *Moana* (2016) tells the legend of Māui, as he helps Moana learn how to navigate the ocean.

16.5 Polynesian societies

In this topic, you will:

- explore the distinct and unique features of Rapa Nui society.
- understand the social structure of Rapa Nui.

There were many Polynesian societies, including those in Hawaii, Samoa, the Marquesas, Tahiti, the Cook Islands, Tonga, Rapa Nui and New Zealand. Many of these societies continue today, with traditional ways of life adapting in response to the modern world. In this topic we will look at one of these societies – Rapa Nui – in greater detail.

Common features of Polynesian societies

Polynesian societies developed in many similar ways. In topic 16.3 on page 16.8, we saw how Polynesian languages are closely related and contain many comparable words.

Source 1 Traditional Polynesian tattoo tools

Tattooing and *ta moko* (see page 16.30) – using needles, chisels or a comb dipped in dye – were practised nearly everywhere in the Polynesian Triangle. Tattoos and *ta moko* often displayed a person's rank, family history or achievements. Different areas of the body were marked, depending on whether a person was male or female.

Polynesians also shared many beliefs about gods and the creation of the world. Most Polynesian societies believed there were many gods. One of the most commonly known gods in Polynesia was Tangaloa (known as Kanaloa in Hawaii and Ta'aroa in Tahiti). According to some myths, Tangaloa created the universe out of darkness.

Source 2 A sketch made by French explorer Dumont D'Urville in the 1800s, showing a traditional Tongan tattoo

The society and culture of Rapa Nui

Polynesian people first settled Rapa Nui around 300 CE. It was then one of the most isolated settlements on Earth – located more than 2000 kilometres from the nearest inhabited Polynesian island and over 3000 kilometres from the coast of South America. Rapa Nui is only about 25 kilometres long and 12 kilometres wide. When Dutch Admiral Jacob Roggeveen arrived at Rapa Nui on Easter Sunday in 1722, he renamed it Easter Island.

The challenge for any historian studying Rapa Nui society is a lack of information. When Europeans first saw Rapa Nui it was already in dramatic decline. The population had become very small – apparently after a period of civil war and **cannibalism**. However, by studying the oral traditions and artefacts of the islanders, it is possible to piece together an understanding of the Rapa Nui way of life. The focus of a great deal of the study of Rapa Nui has been on the giant stone statues constructed there, called moai.

cannibalism
when a human eats another human's flesh

The moai

More than 800 moai have been found on Rapa Nui. It is believed that carving, moving and erecting these huge statues was a feature of islander life for about 300 years, from 1200 CE. The Rapa Nui people obtained the stone to make most of the statues at Rano Raraku, a volcanic crater. They carved the moai at Rano Raraku, and then transported them to the coast, where they set them on stone platforms facing inland. Archaeologists suggest that the Rapa Nui people used a combination of rollers, sleds and ropes to move these huge statues. The largest moai is almost 10 metres high and weighs 75 tonnes.

clans
groups of people linked and united in their aims and behaviours by the knowledge (or a belief) that they share common ancestors

Most of the statues found on Rapa Nui are still in the quarry at Rano Raraku, where they were waiting to be moved. Some were simply left unfinished (see Source 3).

It is thought that the moai represented the ancestors of the different **clans** on Rapa Nui, and that they were placed to watch over the clans and their lands. But our understanding of the role of these statues is incomplete because there are no written records of the time before Europeans arrived. Also, later generations of islanders appear to have deliberately ruined the statues – perhaps as a rejection of their own past culture.

Source 3 Unfinished moai at the Rano Raraku quarry on Rapa Nui

Social organisation and grouping

The island population was divided into social classes: the chiefs, priests and warriors were the leaders, and the common people provided the labour force.

In many Polynesian societies, including the Rapa Nui people and the Māori of New Zealand, the leaders of the society were the ***ariki***, who belonged to a **hereditary** ruling class. In Rapa Nui society, the *ariki* claimed to be direct descendants of Hotu Matu'a. According to legend, Hotu Matu'a was a god-like figure and the first to settle the island of Rapa Nui, arriving with his extended family in two great canoes.

ariki
a member of a noble or chiefly rank in many Polynesian societies

hereditary
inherited; passed down from one generation to another

Source 4 Some of the moai on Rapa Nui

Source 5 Nineteenth-century illustrations of Rapa Nui people

Each family or household was linked to an extended clan through a complex system of social obligations, which involved the exchange of goods, labour and wives. The Rapa Nui people did not use money. The *ariki* organised the labour force and collected taxes in the form of produce and goods. They also supervised trade between the various clans or tribes, and were responsible for keeping the peace and maintaining the food supply. In some cases, this involved controlling a central store of food to be used when food supplies were low.

The labour force was made up of farmers, fishermen, craftspeople and warriors. The common people lived in small, round-walled houses, built on stone foundations. Sweet potato was the main crop on the island. It was a vital food source because it provided high yields, even in poor soil.

The Rapa Nui people had no metal tools. They used stone axes, stone fish hooks and bone needles, and made tools – such as spear points, scrapers and knives – from obsidian (volcanic glass).

The carving, moving and placement of the moai required a well-organised social structure. Some sections of the community had to ensure a surplus of food to feed the important stonemasons, tool-makers and engineers who were responsible for creating and putting up the moai.

Traditionally, marriages were arranged by the fathers of the bride and groom. Many marriages ended in divorce, and both men and women could break their marriage ties for almost any reason, and then remarry.

Explore it!
A virtual field trip to Rapa Nui

The roles for men and women were strictly defined. Men were responsible for planting the garden, fishing and building. Women harvested crops and handled domestic chores.

The decline of Rapa Nui

Rapa Nui society was devastated by clan warfare around 1680. This led to the final breakdown of its traditional structure. The population may once have been as high as 15 000, but by the time Europeans arrived, there were only 2000 to 3000 people living on the island. Contact with Europeans then ravaged the remaining population. Europeans not only brought deadly diseases such as smallpox (to which the Rapa Nui people had no immunity), but also introduced the slave trade.

16.5 CHECK YOUR LEARNING

Review and understand

1 **List** three features that most Polynesian societies had in common.

2 **Describe** the role of the *ariki* in Rapa Nui society.

Apply and analyse

3 **Summarise** the social organisation of Rapa Nui. In your summary include the relationship between the *ariki* and Hotu Matu'a.

Evaluate and create

4 According to Rapa Nui legend, the moai were once alive and walked to their current locations.

a Conduct **research** into the theories that archaeologists have to explain how the moai were transported.

b **Discuss** the methods used to test these theories. Which theory do you think is most likely to be correct, and why?

16.6 Māori society

In this topic, you will:

- » distinguish between the key social groups and structure of Māori society.

Māori society developed on the islands of New Zealand around 1000 years ago and has its own distinctive culture. The Māori call New Zealand 'Aotearoa', meaning 'land of the long white cloud'. Aotearoa is surrounded by dangerous seas and was probably one of the last areas to be settled by the Polynesians. Historians believe that the Māori probably arrived in Aotearoa between 950 and 1130 CE. The Māori have strong oral traditions about this discovery and settlement.

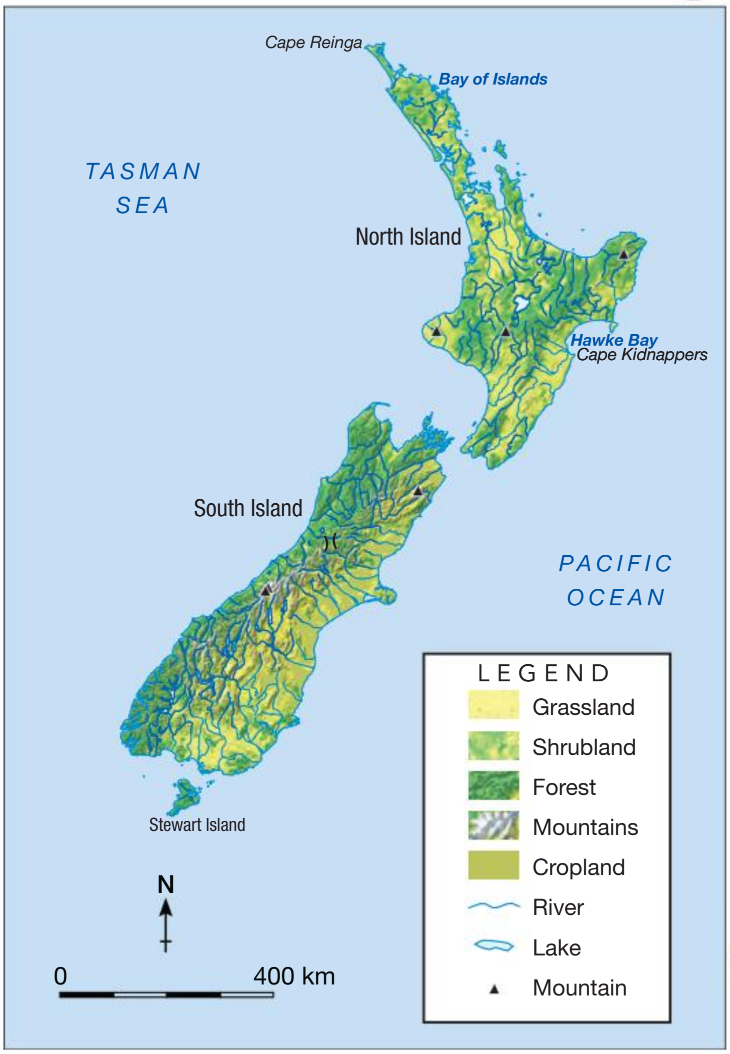
The Māori account of settlement

Māori tradition tells of Chief Kupe travelling to Aotearoa in about 950 CE. According to the legend, Kupe travelled in a canoe called *Maataa-hourua* from a land called Hawaiki. He landed near modern-day Wellington at a place he called Whanganui-a-tara. When Chief Kupe first saw the islands, it is believed that he said: '*He ao, he aotea he Aotearoa*' ('It is a cloud, a white cloud, a long white cloud').

waka
a Māori canoe; it can be small and used for fishing, or large and used for war

Legend says that after the discovery, two more Polynesian explorers – Toi and Whatonga – followed in 1150. Then there was a voyage of settlers in 1350 known as the 'Great Fleet'. The Great Fleet was made up of eight canoes, each known as ***waka***. Modern Māori trace their ancestry to these settlers in song and oral traditions. Many modern historians question the Great Fleet story, but archaeological evidence does point to the arrival of the Polynesians around 1280.

AOTEAROA (NEW ZEALAND)



Source 6 Source: Oxford University Press

Source 7 Wi Huata tells the history of his family going back 50 generations using a *rākau whakapapa*.

The importance of ancestry

Genealogy (the study of family history) is important to the Māori because each tribe traces its ancestry back to a *waka* of origin. Māori genealogy is known as *whakapapa*, which means 'placing the people in their layers'. A special carved genealogy staff called a *rākau whakapapa* is used to recite the history of the people (see Source 7). The *rākau whakapapa* is about a metre in length and covered in knobs. Each knob on the staff represents a different generation, and serves as a reminder to the person reciting the genealogy.

Social organisation and grouping

Māori society was organised around the *iwi* (tribe), which traced its descent to one of the original *waka* (canoes) of the Great Fleet. The main group within the *iwi* was the *hapu* (sub-tribe). The *hapu* was usually made up of approximately 500 people organised in several related family groups. Each *hapu* was independent and had established land boundaries. Rank and leadership within traditional Māori culture was based on a person's relationship to the ancestors. Māori society was made up of three main classes: *rangatira*, *tutua* and *taurekareka*.

The *rangatira*, or ruling class, was made up of the most important families. An elder within the *rangatira* ensured that the *hapu* survived, and that its land and resources were protected and defended.

Analyse this!
Rangatira Tāmati Wāka

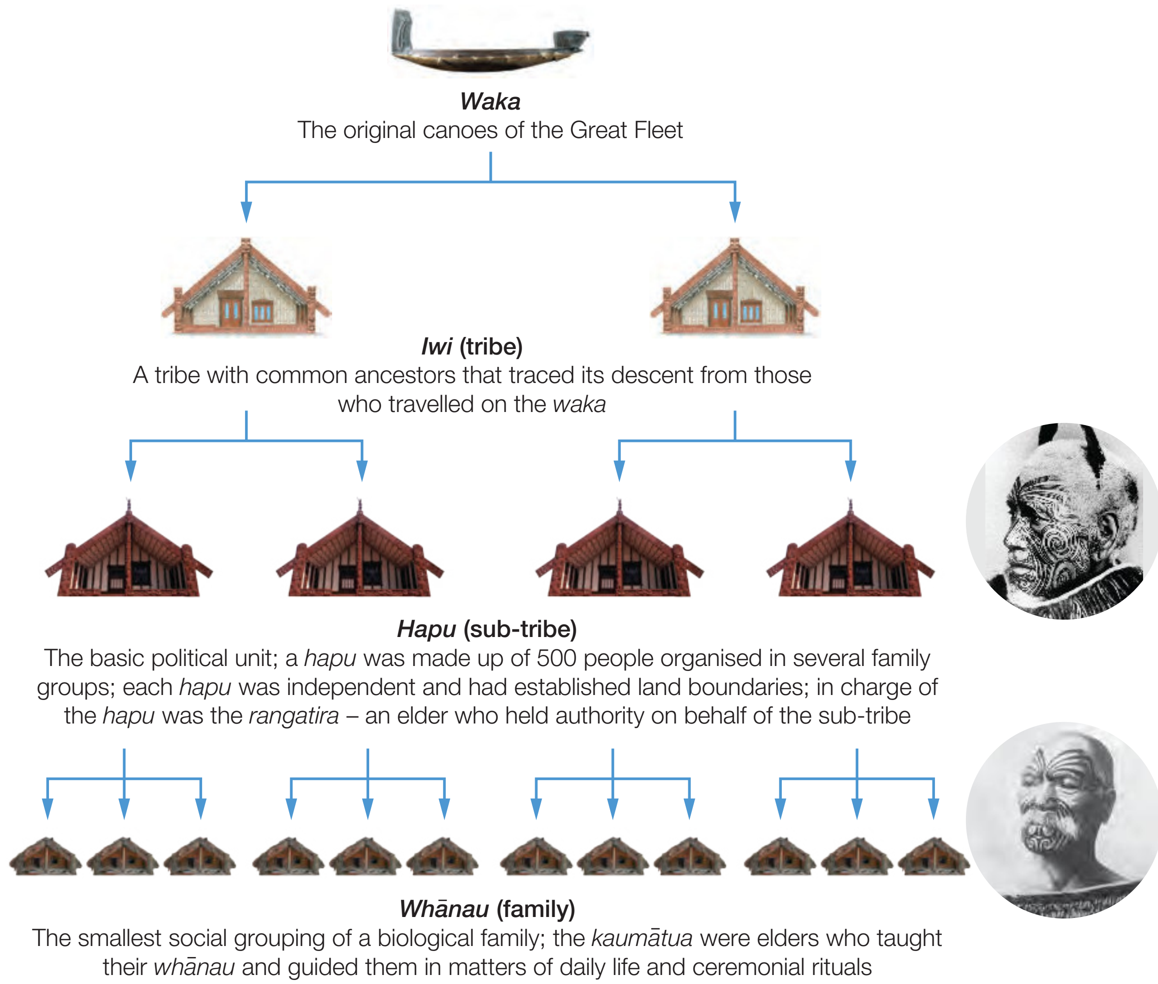
The *ariki* was the leader of the *rangatira*. He was the first-born son of the most senior family that could trace its ancestry back to the founding *waka*. While the *ariki* were the clear leaders, their authority came from their family. The *ariki* were expected to listen to the opinions of all members of the tribe and to prove their leadership in war, diplomacy and the wise treatment of the people. These decisions were reached at a *marae* (a public meeting) held in or near the *whare runanga* (meeting house).

Source 8 A painting of Māori Tāmati Wāka Nene, created by Lindauer Gottfried, 1890

The *tutua* were the largest class in Māori society. They were not as senior in rank as the *rangatira*, but they were the most productive group. Many people in this class had specialised skills, and economic wealth depended on them.

The *taurekareka* were slaves who had been captured in war. They carried out all the menial tasks for the tribe, but they were not prisoners. Tribal beliefs stated that once they were captured, slaves were considered dead, so it made little sense for them to escape. These slaves could often marry into the tribe and their children would be free.

Within this social structure and at differing levels there was a fourth class called *tohunga*. This group consisted of people who had shown talent or skill as a child. They became the priests or the specialists who built houses or canoes, or who carried out tasks such as fishing or carving. The *tohunga* were also the educators – telling and passing on the tribal history.



Source 9 The structure of Māori society, including the *iwi*, *hapu*, *rangatira*, *whānau* and *kaumātua*

16.6 CHECK YOUR LEARNING

Review and understand

1. **Identify** what Chief Kupe is known for, in Māori oral tradition.
2. **Describe** the function of a *rākau whakapapa*.

Apply and analyse

3. **Summarise** the significance of the Great Fleet in Māori tradition.
4. **Examine** Source 6. Write a paragraph identifying the locations where you would have expected most Māori settlements to be, based on the vegetation.

Evaluate and create

5. **Create** your own hierarchical diagram (similar to Source 9) to convey the main classes in Māori society. Include a description of their roles.
6. In small groups, **discuss** to what extent family relationships in Māori society were more or less important than they are for you in your life.

16.7 Daily life in a Māori village

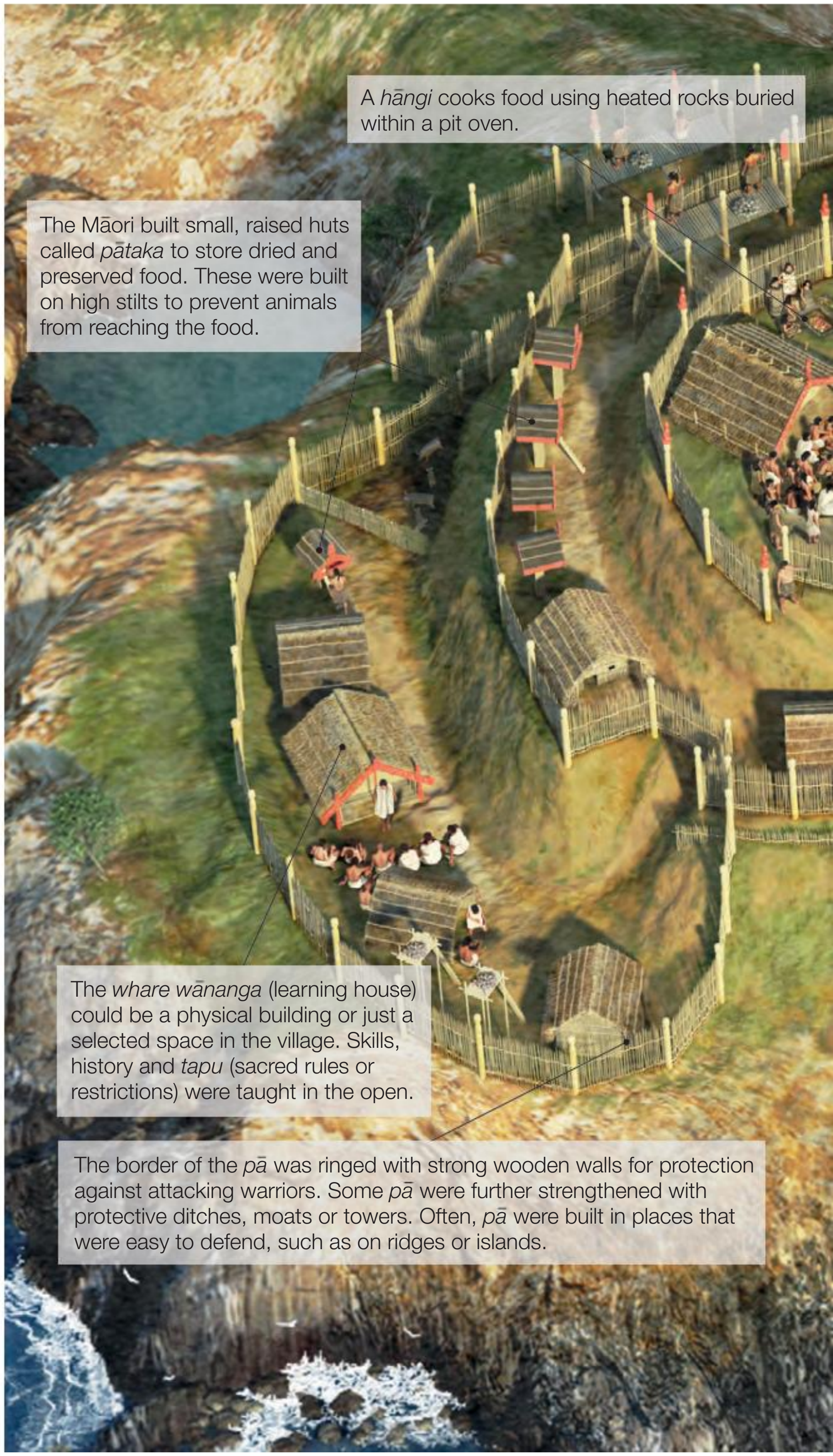
In this topic, you will:

- develop an understanding of the way of life in Māori society.

The focus of daily life in traditional Māori communities was on getting food. Everyone in the village, including children, worked together. Food was prepared and eaten together in the village, or *pā*. Māori farmed much of their food, but they also hunted and gathered food from the land and sea. Birds, fish and native vegetables were added to their staple food, kumara (sweet potato). Diets also varied between regions. On Stewart Island, for example, the mutton bird was plentiful; whereas people in other areas caught eels or collected shellfish.

The *hāngi* was a method of cooking. To make a *hāngi*, the cooks would first dig a large pit. They would light a fire and heat stones until they were hot, and then arrange the stones in the bottom of the *hāngi* pit. The food was wrapped in leaves or put in baskets to protect it from burning, and then placed on the hot stones and covered over with earth. The *hāngi* was left buried for around three hours. When the *hāngi* was 'raised', the food was ready to share.

Interactive
A traditional Māori *pā*



Source 10 A modern artist's impression of a traditional Māori *pā*

A host might welcome a visitor using the *hongi*, a traditional Māori greeting where two people press their nose and forehead together.

16.7 CHECK YOUR LEARNING

Review and understand

1 **Identify** the typical features of a Māori *pā*. **List** as many as you can.

2 **Outline** what might happen at the *marae*.

3 **Describe** how to prepare a *hāngi*.

Apply and analyse

4 Using the information in Source 10, write a paragraph to **summarise** life in a Māori *pā*.

Evaluate and create

5 In small groups, **create** a newspaper called the *Pā Times*.

Your newspaper might include articles about life in the *pā*, upcoming events and news about members of the village. Some suggestions for articles might be:

- a notice of an upcoming *hāngi* feast
- a story about a social scandal among the *rangatira* or the *taurekareka* (or both)
- advertisements for services by *tohunga* canoe-builders or carpenters.

16B RICH TASK

Quizlet

Revise the key terms you have learnt so far.

Māori warrior culture

Traditional Māori society became very warlike. A growing population led to competition for resources which, in turn, led to an increase in warring between tribes. Conflicts could break out over land or if one tribe insulted another. After an insult or a defeat, the injured party was obliged to seek revenge and restore their *mana* (status). People prepared themselves for battle using special rituals, and a dance called the *haka*.

To scare the enemy, Māori warriors would perform a *haka* that called on Tumatauenga (the god of war). This *haka* used loud cries, the waving of weapons and fierce facial expressions, such as grimaces, tongue-poking and bulging eyes. Throat-cutting gestures and other movements would be used to show the enemy what was going to happen to them. A different *haka* could also be performed in the *pā* to retell the stories of past victories.

Once ready for war, the chief would lead groups of 70 or 140 warriors (the number that could travel in a war canoe) out to fight. They would often attack at dawn, using the natural bush as cover to carry out surprise raids. The raiders would try to kill all the enemy to prevent any revenge attacks. Fighting was hand-to-hand and fierce, using clubs made from wood, bone or greenstone.

After battle, cleansing rites would be performed. Tribes could make peace with one another by arranging marriages between people of chiefly rank.

Source 11 An illustration of a fortified Māori *pā* on Rotorua Lake, created by George French Angas in 1847

Source 12

9 October 1769, Poverty Bay, New Zealand

I went ashore … manned and armed and went to the side of the river, the natives being got together on the opposite side. We called to them in the Georges Island language, but they answered us by flourishing their weapons over their heads and dancing, as we supposed the war dance …

31 October 1769, Cape Runaway, New Zealand

[F]ive canoes came off to us, in one of which were upwards of 40 men, all armed with pikes and so on. From this and other circumstances it fully appeared that they came with no friendly intention … I ordered a grapeshot [small iron balls fired together from a cannon] to be fired a little wide of them. This made them pull off a little …

Extracts from Captain James Cook's *Endeavour* journal, written during his first voyage of 1768–71, relating two of his first encounters with Māori people.

Source 13 Paddlers from different *waka* perform a *haka* on Waitangi Day, New Zealand's national day.

KEY SKILL
Analysing sources

Analysing primary sources

The primary sources that historians use to understand the traditional Māori way of life tell different stories. It is the job of historians to examine these sources and come to a conclusion about their usefulness and reliability. It is important to identify who created each source and the reason it was created. That way you can identify any potential bias.

Step 1 Evaluating reliability: To determine the reliability of a source, you need to identify whether it is biased. Being biased means having an unbalanced or one-sided opinion. To recognise bias in a source, ask yourself:

- Who created the source?
- Why was the source created?
- Is there a possibility of bias?
- What message does the source convey?
- What is included and what is excluded?
- What can the source tell me about life at the time that it was created?

Step 2 Evaluating usefulness: To evaluate the usefulness of a source, ask yourself:

- What question am I investigating?
- Is the source reliable?
- What messages is the source conveying – both explicit and implicit?
- What is the source saying or showing that will help me to answer my historical question?
- What additional information would I like that would help me to answer my question?

For more information on this key skill, refer to page 213 of ‘The history toolkit’.

Practise the skill

1 **Examine** Sources 11, 12 and 14 carefully and complete a copy of this table in your notebook.

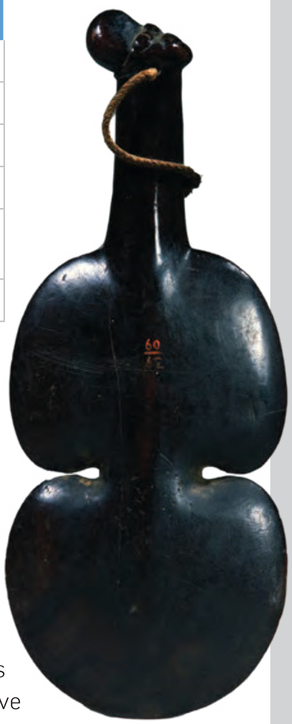
	Source 11	Source 12	Source 14
Who created the source?			
When was the source created?			
Why was the source created?			
What does the source suggest about the Maori?			
What evidence does the source provide that the Maori were a warlike people?			
Do you think the source is reliable? Why or why not?			

2 **Summarise** the information you have gathered above in a short paragraph titled ‘The Maori: A warrior people’.

Extend your understanding

1 Study the illustration of the *pā* on pages 16.22 to 16.23. Imagine you are a chief planning to raid this *pā*. **Describe** how you would organise your attack. Make sure you include information about:

- which direction you would come from
- what you would do to overcome the *pā*’s defences.



Source 14 This is an eighteenth-century example of short wooden ‘stabbing’ club, called a *kotiate*, which was used by Māori in close hand-to-hand combat. Māori chiefs often held it while they gave speeches.

16.8 Managing the environment

In this topic, you will:

» explore the causes and effects of Polynesian settlements on the environment.

Think, pair, share *

- Think about the ways living on such a small island would have impacted the lifestyles of the people of Rapa Nui.
- Discuss your ideas with a partner.
- Share your thoughts with the class.

The islands and atolls of Polynesia have a limited number of resources. As Polynesian settlements grew, environmental management was vital to survival, with unsustainable practices threatening the ability of humans to live there. The inhabitants of Rapa Nui experienced the hardships of living unsustainably after logging all the trees on the island. This is still noticeable on Rapa Nui today (see Source 1).

The Māori were more closely linked to their environment than the later European arrivals. However, as the extinction of the moa shows, they also had a huge impact early in their settlement of New Zealand before they learnt to adapt and protect the environment.

Overuse of Rapa Nui's natural resources

Rapa Nui once had over a million giant palm trees and other types of trees and vegetation. But by the time the first Europeans saw the island in 1722, most of the trees were gone. As Dutchmen Jacob Roggeveen recounted: 'We counted as sand the withered grass, hay, or other scorched and burnt vegetation, because its wasted appearance could give no other impression than of a singular poverty and barrenness.' Some historians think that the history of Rapa Nui can be seen as a warning about ruining the environment through **deforestation**.

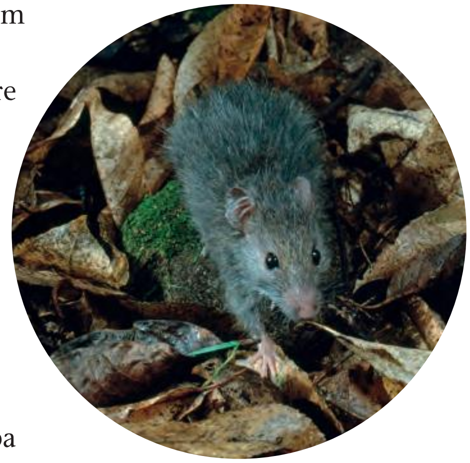
deforestation
the action of clearing a wide area of trees

Timber was used by the Rapa Nui people as fuel for fires, to build canoes and houses, and possibly to make rollers, sleds and thick rope for moving the moai. As the Rapa Nui people cut down trees to obtain timber, they gradually destroyed the ancient forests. This deforestation also caused soil to blow or wash away, and then streams began to disappear.

Source 1 The vast grasslands of Rapa Nui are all that is left after deforestation.

Evidence found by archaeologists uncovered pollen from five different palm species. Charcoal from ancient fires matched another 16 extinct species, indicating that there had once been diverse forests present on Rapa Nui. There is evidence that the Polynesian rat, which was brought to the island with the first settlers, also contributed to the destruction of the forests. Rats ate the seeds of palm trees before they could grow.

The flow-on effects of deforestation were noticed by the Dutch arrivals in 1722, who saw that the Rapa Nui people's canoes were small and leaky. **Middens** have provided evidence that food sources began to dwindle, as the Rapa Nui people could no longer travel out into the ocean to catch porpoise and other large fish. Shellfish became smaller in size due to overharvesting. This led to the extinction of at least six land birds, as the Rapa Nui people became more desperate for food. The island had once been a breeding haven for 25 species of seabirds due to its lack of predators, but populations were dramatically reduced after Polynesian settlement. The Polynesian rat became the only growing food source on the island.



Source 2 A Polynesian rat

middens
deposits of waste containing shells, animal bones and other refuse that indicates the site of a human settlement

Deforestation did not automatically mean the end of Rapa Nui society. The Rapa Nui, like other Polynesians, were not totally dependent on wildlife or palm trees for food. They also cultivated sweet potato, raised and ate chickens, and caught seafood. The gradual disappearance of the forests over a period of 400 to 500 years meant that people were able to adapt.

Māori management of the environment

The Māori believed that all living things were descended from gods. These gods were part of the environment, and were found in the rivers, mountains and lakes. Geographical features were thought to contain *mana* (spiritual essence or power). Each tribe was responsible for maintaining the *mana* of its environment. These beliefs affected the way the Māori managed their environment – one of their most significant achievements.

The use of *tapu*

The word *tapu* has many meanings in Māori. Sometimes *tapu* means 'sacred', but it can also mean that something is forbidden. If an item is *tapu,* it cannot come into contact with a person, or the gods might become angry. People could be *tapu* – though generally only men, or possibly a woman of the highest rank.

Source 3 The Māori believed their gods were part of the environment, and that they were found in rivers, mountains and lakes.

The chief and his food were *tapu*. A lesser person in the tribe could not touch him and would be punished by death if they did. His house was also *tapu,* and could only be entered – particularly by a woman – after a special ritual was carried out. Other people who were *tapu* included the healer or priest, along with their homes and possessions. Areas such as burial grounds were *tapu*.

Tapu was also the word for the rules that were developed to protect sacred places, people and objects.

KEY CONCEPT
Cause & effect

Extinction of the moa

One early source of food for the Māori was the moa, a large flightless bird. There were originally 24 species of moa, ranging in size from that of a turkey to one that was 3.7 metres high. All moa were herbivores and lived on twigs, shrubs, leaves and tree fruits.

Unfortunately for the moa, they were just too useful. They were easy to hunt and therefore became easy prey for the early Māori settlers. Their bones also made good tools and implements. The moa were hunted into extinction soon after the arrival of the Māori.

Other species that were hunted to extinction in New Zealand included the flightless goose, the adzebill (another large flightless bird), swans and pelicans. Sea lions and elephant seals were also hunted in large numbers. But as time went on and these ready food sources started to disappear, the Māori moved from hunting to farming and storing food, as well as conservation of other wild food resources.

Like other societies, the Māori had to balance their needs with those of the environment. When resources came under pressure, the Māori learnt from their experiences with the moa and used special *tapu* (rules), called *rāhui*, to protect the environment.

For more information on this key concept, refer to page 200 of 'The history toolkit'.

Source 4 A skeleton of a moa, estimated to be 5000 years old

Analyse this!
A tohunga being fed by a child

Source 5 This painting shows a *tohunga* being fed by a child. Some *tohunga* were so *tapu* that they needed others to feed them, as food was believed to pollute their *tapu*.

The role of *tohunga* (priests)

The priests' most important role was to see that *tikanga* (customs or rituals) were correctly observed. They were healers of both physical and spiritual ills, and they performed the appropriate rituals when the tribe was farming, fishing, hunting and going to war. Importantly, this included the placing and lifting of *tapu*.

Rāhui and sustainability

As their populations grew and resources declined, the Māori developed ways to more actively manage their environment. One way they managed resources sustainably was through a particular type of *tapu* known as *rāhui*. *Rāhui* involved banning the use of particular environmental resources for a specified time.

For example, fishing might be forbidden in a particular lake in order to give the fish a chance to breed, or an area of land might be set aside so that plants could recover.

After declaring a *rāhui*, the chief would set its limits. He would mark it with a post or describe the features of the landscape that served as its borders. Other *rāhui* were based on time rather than space, with hunting of particular animals or birds forbidden during certain times of the year.

Source 6

> The conservation *rāhui* was used to protect the products of the land and water … [the] chief Tukuha … set up a *rāhui* post at Te Rautāwhiri.
>
> The post remained in the same position, but whenever the chief wanted to *rāhui* the eels of his part of the Rangitaiki River, he would 'hang one of his old garments' on it. That would signal a complete ban on that one resource, eels. In this instance, the name of the place, Te Rautāwhiri (the leaves twisted on), indicates that it was used by custom as a place to signal a *rāhui*.
>
> A description of *rāhui* by Māori anthropologist Hirini Moko Mead, 2003

The system of *rāhui* meant that the Māori could use the natural resources available to them without depleting them, meaning they would still be available for future generations. This was a great achievement in early conservation and is something that Western societies are now looking at. In fact, *rāhui* is still used in New Zealand today to protect the numbers of native fish, shellfish and birds.

Template
Futures wheel

16.8 CHECK YOUR LEARNING

Review and understand

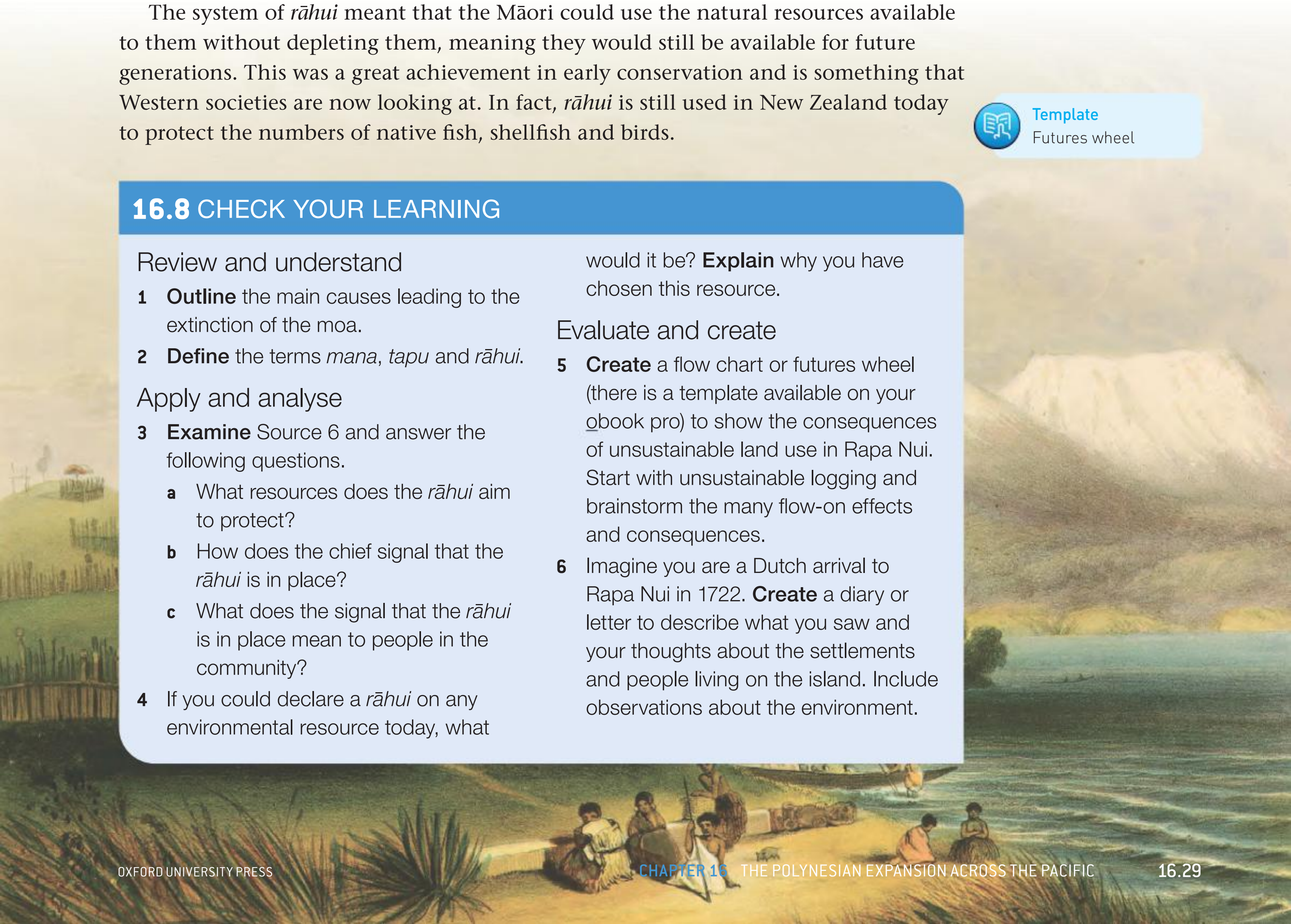
1. **Outline** the main causes leading to the extinction of the moa.
2. **Define** the terms *mana*, *tapu* and *rāhui*.

Apply and analyse

3. **Examine** Source 6 and answer the following questions.
   a. What resources does the *rāhui* aim to protect?
   b. How does the chief signal that the *rāhui* is in place?
   c. What does the signal that the *rāhui* is in place mean to people in the community?
4. If you could declare a *rāhui* on any environmental resource today, what would it be? **Explain** why you have chosen this resource.

Evaluate and create

5. **Create** a flow chart or futures wheel (there is a template available on your obook pro) to show the consequences of unsustainable land use in Rapa Nui. Start with unsustainable logging and brainstorm the many flow-on effects and consequences.
6. Imagine you are a Dutch arrival to Rapa Nui in 1722. **Create** a diary or letter to describe what you saw and your thoughts about the settlements and people living on the island. Include observations about the environment.



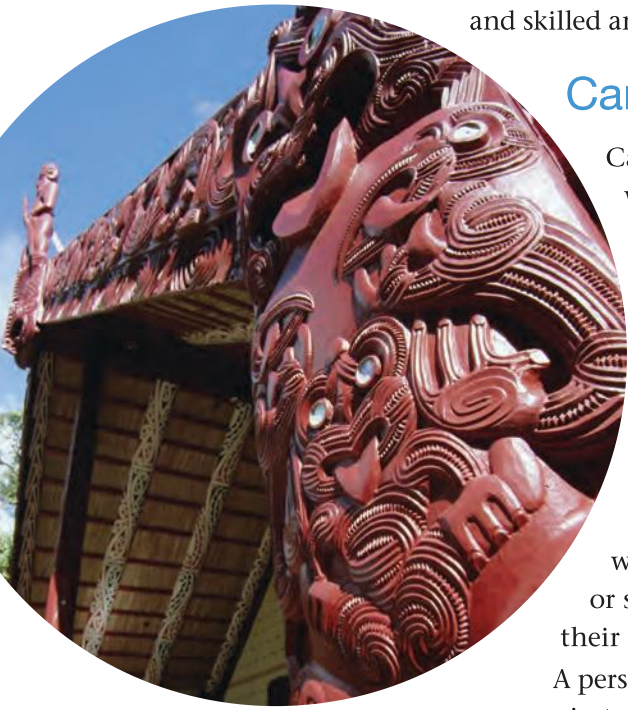
16.9 Polynesian arts

In this topic, you will:

» understand the significance of art in representing Polynesian beliefs and culture.

The beauty and importance of Polynesian art can most clearly be seen in their carving, weaving and *tā moko*. These arts use intricate, detailed patterns and motifs requiring high levels of skill to reproduce – making them a significant achievement. They were common across all levels of Polynesian society, communicating important information about spiritual matters, ancestry and tribal identity.

Polynesian culture was an oral culture, but stories were not just passed on by storytellers – tribes lived surrounded by their histories, both in their carvings and in their tattoos. For these reasons, the creation of art was also governed by the rules of *tapu*, and skilled artists were well respected and held high positions within the tribe.



Source 7 A detail of the carving on the *whare rūnanga* (meeting house) in the town of Waitangi

Carving

Carving was probably the most significant art form, and carvings in wood were the most important to the tribe. Carvings on canoes and within the *whare rūnanga* (meeting house) held the stories of the tribe's history, told with familiar motifs and symbols. The shapes used held meaning and provided a link to ancestors or spirits.

Tā moko

In traditional Māori society, *tā moko* is the permanent marking of the body and face. It is different from tattooing in that the skin is carved rather than punctured. *Tohunga-ta-moko*, or *moko* specialists, were highly respected. The patterns or *moko* illustrated a person's rank or status, and a person without *moko* had a very low position within their tribe.

A person's head was the most important area for *moko* because it communicated specific things, such as social standing. Initially, the *moko* specialist would cut into the facial skin using a bone chisel. Then he would dip the chisel into a pigment made from burnt Kauri gum or vegetable caterpillars, and tap it into the wounds. This process could be very painful. Swelling and even temporary loss of sight was common. Afterwards, the wearer was left with long, coloured grooves on their skin.

Both women and men wore *moko*, but men usually had more. Men generally received *moko* on their faces, buttocks and thighs; women would only have them on their lips, chins and nostrils. Undergoing *tā moko* was an important step in leaving childhood behind and entering the adult world.

Source 8 A Māori chief with facial *moko*

Quiz me!
A quick quiz on Polynesian arts

Weaving

Weaving was done by the women of the tribe with flax. Items such as cloaks, skirts, floor mats and baskets were created. Weavers would use different types of flax, depending on the desired colour or use of the item.

Tapa cloth

Barkcloth is a material derived from the inner bark of trees, and is referred to as *tapa* in Polynesia. The art form of *tapa*-making was considered a sacred knowledge that only women could hold. The process of making the cloth involved stripping bark, soaking it in water, pounding the strips into cloth, and beating pieces together until the fibres fused to form large sheets.

Plants, roots and seeds were then used to form ink and dyes, which were painted decoratively onto the cloth using symbolic motifs and patterns. These geometric shapes, lines and curves are very significant and distinctive to Polynesian culture. The patterns on a *tapa* cloth are a form of symbolic language, with certain designs depicting gods, myths and legends. The *tapa* was to represent the sacred connection between man and nature.

Tapa cloth was primarily used for clothing and ceremonial purposes, such as wall hangings or flooring in meeting houses. It was used to wrap a newborn baby, as a wedding dress and also at a funeral in place of a coffin. Exchanging *tapa* cloth between families or clans would reinforce a relationship or the closeness of their bond.

Today, the use of these sacred designs by businesses is of concern, as they could trademark and restrict the usage of certain spiritual patterns that have been used for centuries. Over time, this could result in a loss of culture.

For more information on this key concept, refer to page 201 of 'The history toolkit'.

Source 9 A modern-day wedding using clothing made from *tapa* cloth

KEY CONCEPT
Significance

16.9 CHECK YOUR LEARNING

Review and understand

1. Why were skilled artists held in high regard in Polynesian societies?
2. Men and women were involved in different arts. **Identify** which of the arts were the domain of women.

Apply and analyse

3. **Analyse** the positive and negatives impacts that businesses could have on Polynesian culture.

Evaluate and create

4. Think about how the Polynesians used design in carving and *tapa* cloth to show their relationships with their ancestors. **Create** a design on a piece of paper that represents who you are and where you have come from. (The design does not need to be for a carving; it could be a pattern to go on a T-shirt or flag.)

Source 10 A carved Māori greenstone *tiki*, traditionally worn around the neck

16C RICH TASK

Quizlet
Revise the key terms you have learnt so far.

Canoe-building

Canoe-building was an important and sacred skill for Polynesian peoples. Expert carpenters were highly regarded, and in many Polynesian societies the title of 'boatbuilder' was passed down from father to son. Having a large canoe built was expensive, and often canoe-builders were part of a chief or king's staff. There were also complex rituals involved in building canoes.

Source 11

Four hundred men were employed in the building of a certain canoe at Pua Ma'u, working under the direction of four [*tohunga*]. The work was done where the tree was felled and where a decorated house was erected for the workmen. Workmen and [*tohunga*] were fed by the chief, twenty men being employed in this work. The place was *tapu* to women and to strangers. Any intruder from another valley would be killed and eaten. When the canoe was finished a great feast was held at the place of manufacture, the workmen's house being decorated with ferns and wildvines.

A description of canoe-building in the Marquesas, from E. S. Craighill Handy, *The Native Culture in the Marquesas*, Bayard Dominick Expedition 1920–21, Vol. 9, Bernice P. Bishop Museum, 1923, p. 155

Source 12

Canoe building was one of the industries of ancient Hawaiians, and it is still carried on to this day. This is how it is done: when a man desires to go up to the mountain forests to get a tree to build a canoe, he must first prepare a pig, red fish, black fish and various other things as offerings to propitiate [pacify] the forest deities. When these things are ready he comes home and invites dreams in his sleep. If they are good dreams, he will go up to the forests; but if they are unfavourable, he won't go.

When he arrives at the place where the koa tree selected for his canoe stands, he kindles a fire … to cook the offerings. When all the offerings are cooked, prayers are offered to the canoe-building gods … then he eats some of the food and throws some to the gods. When all these things have been attended to, the tree is ready to be cut.

A description of canoe-building in Hawaii in A. Fornander, *Fornander Collection of Hawaiian Antiquities and Folklore*, Vol. 5, Bernice P. Bishop Museum, 1916, pp. 610–14

Source 13

The war canoes were very *tapu*; every step in their construction was accompanied by incantations said by the priests, part of whose special functions it was to act as naval architects.

Extract from Elsdon Best, *The Maori Canoe*, A. R Shearer, 1925, pp. 62–3

Source 14 A canoe being built using traditional methods

KEY SKILL
Analysing sources

Locating, comparing, selecting and using information from a range of sources as evidence

When conducting a historical inquiry, it is important to locate, compare, select and use information from a range of sources in order to answer your key inquiry question. By doing this, you can be sure that the evidence you gather from these sources is fair, balanced and accurate.

The simplest and most effective method to compare sources is to use a source evaluation chart. This kind of chart can help you quickly decide which sources provide the most useful, relevant and reliable evidence. To create a source evaluation chart, follow these steps:

Step 1 Create a table that is four columns wide and has as many rows as required – this will vary depending on how many sources you are comparing.

Step 2 List your inquiry question at the top of the table, as well as any possible hypotheses you may have developed during your research.

Step 3 In column 1, list the name of the source and where you found it. In column 2, list the type of source – primary or secondary. In column 3, list all the positive things (pros) and negative things (cons) about the source. For example, the source may have been written by a very reputable historian (pro); but it may be short and not include many details (con). In column 4, list the details of where you found it, such as the internet address, or book title and author details.

Step 4 Once you have completed your source evaluation chart, you will be in a good position to make some decisions about which sources provide reliable evidence and which do not. This will then help you answer your inquiry question.

For more information on this key skill, refer to page 213 of 'The history toolkit'.

Practise the skill

1 **Compare** the information provided in Sources 11 to 15 by creating a source evaluation chart as outlined above. For an example of this type of chart, log onto your obook pro.

2 Based on your analysis of the available information, answer this inquiry question: 'How sacred was the skill of canoe-building to the Polynesian peoples?'

Extend your understanding

1 What does the description in Source 11 tell you about the amount of work required to build a new canoe?

2 With reference to Sources 11 and 12, **explain** why you think women and strangers were banned from witnessing canoe-building in some Polynesian societies.

Source 15 A Māori war canoe or ***waka taua***; traditionally, war canoes were often painted black and red – black represents death and red means *tapu*.

Template
A source evaluation chart

16 CHAPTER REVIEW

Review questions

16A How did Polynesians spread across the Pacific and where did they settle?

1 **Outline** how DNA evidence has improved our understanding of Polynesian societies. (1 mark)

2 **Summarise** how Polynesians used the natural world in their expansion across the Pacific. (3 marks)

3 **Discuss** the east–west debate over Polynesian expansion according to the evidence. Decide on your own opinion and give reasons as to why you came to this conclusion. (6 marks)

(Total: 10 marks)

16B How was society organised in Polynesian villages?

1 **Compare** the similarities and differences between the social structure of the Māori and Rapa Nui peoples. (4 marks)

2 **Describe** the role and features of the *whare wānanga, whare rūnanga* and *pātaka*. (6 marks)

(Total: 10 marks)

16C What developments influenced life in Polynesia?

1 **Summarise** common features of Polynesian arts. (3 marks)

2 **Analyse** the cause and effect of *rāhui* on the environment. (4 marks)

3 'The Rapa Nui were more invested in building moai than ensuring their own survival.' **Determine** (decide) if you agree with the statement, and provide a reason as to why or why not. (3 marks).

(Total: 10 marks)

Review activity

Read Sources 16 to 18, then answer the questions that follow.

Accidental versus intentional migration

Source 16

> [I]n losing sight for two or four days of the land, [they] do not know, nor can determine their situation … the instruments of navigation of these Indians are their own eyes, or their guess of small distances. Since to what might be alleged that they direct themselves by the sun, moon, and stars? It may be replied, that the sun is not visible by night, the mutability [changing nature] of the moon is well known, and, in short they are not always present, nor in the same place, nor without clouds before stars, moon, and sun. But were all this possible (which it is not) yet their voyages must be so short as has been said.

Extract from Portuguese navigator Pedro Fernandez de Quiros, 1597

Source 17

> [T]hese people sail in those Seas from Island to Island for several hundred Leagues, the Sun serving them for a Compass by day, and the Moon and Stars by night. When this comes to be proved, we shall be no longer at a loss to know how the Islands lying in those Seas came to be peopled.

Extract from Captain James Cook, July 1769

Source 18

> When you go, lay the bow of the canoe to the Cloud Pillar that lies south-west. When night falls, steer towards the star Atua-tahi. Hold to the left of Mangaroa and travel on. When day breaks, again sail towards the Cloud Pillar and continue on.

Extract from Māori folklore, based on the navigation instructions of the legendary Chief Kupe

1 For each source, **describe** whether it suggests the Polynesian migration happened by accident or was intentional. Refer to each source to support your answer. (6 marks)

2 **Summarise** the perspectives held towards the Polynesians in Sources 16 and 17. Provide examples to support your answer. (6 marks)

3 Create a table like the one shown, and **outline** the arguments in these sources that support the two possible reasons for migration. (4 marks)

Accidental migration	Intentional migration

4 **Classify** these three sources in order of usefulness (from most useful to least useful) for understanding Polynesian migration. Provide reasoning for your classifications.) (4 marks)

(Total: 20 marks)

Check your Student obook pro for these digital resources and more:

Student book questions
Chapter 16

Key skill worksheet
Communicating & reflecting: Chapter 16

Quizlet
Play a game of Quizlet on the Polynesian expansion across the Pacific.

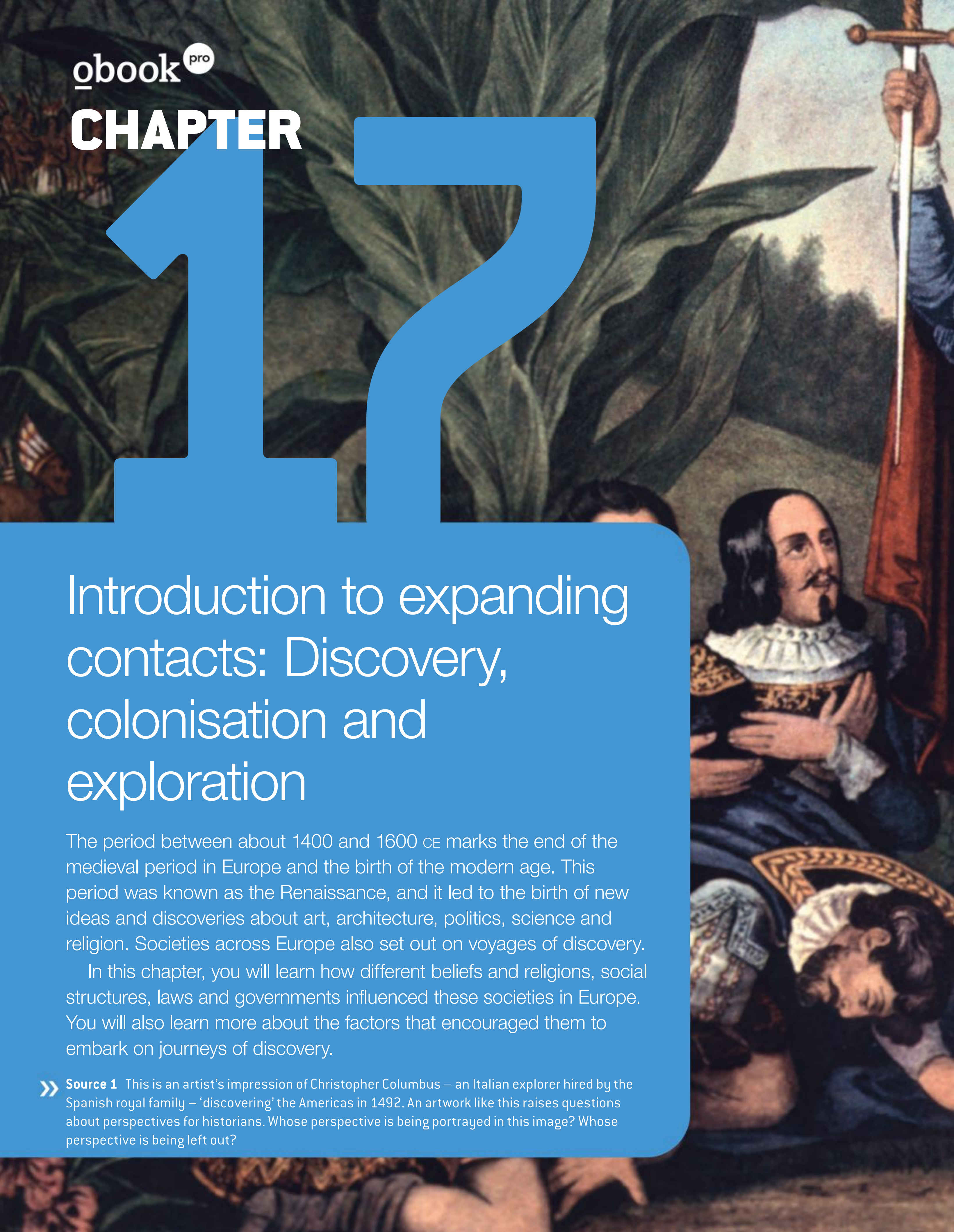
Chapter review quiz
Chapter 16

CHAPTER 17

Introduction to expanding contacts: Discovery, colonisation and exploration

The period between about 1400 and 1600 CE marks the end of the medieval period in Europe and the birth of the modern age. This period was known as the Renaissance, and it led to the birth of new ideas and discoveries about art, architecture, politics, science and religion. Societies across Europe also set out on voyages of discovery.

In this chapter, you will learn how different beliefs and religions, social structures, laws and governments influenced these societies in Europe. You will also learn more about the factors that encouraged them to embark on journeys of discovery.



Source 1 This is an artist's impression of Christopher Columbus – an Italian explorer hired by the Spanish royal family – 'discovering' the Americas in 1492. An artwork like this raises questions about perspectives for historians. Whose perspective is being portrayed in this image? Whose perspective is being left out?

17A

What caused societies in Europe to begin a period of discovery, colonisation and exploration?

17B

What were the key factors leading to discovery, colonisation and exploration?

Expanding contacts: Discovery, colonisation and exploration

This unit offers a choice of two topics:

- Renaissance Italy
- The Spanish conquest of the Americas (available on obook pro).

You must choose *at least one* of these topics for study.

17.1 The where and when of expanding contacts: discovery and exploration

In this topic, you will:

» identify the key places that were explored and developed during the age of discovery, colonisation and exploration.

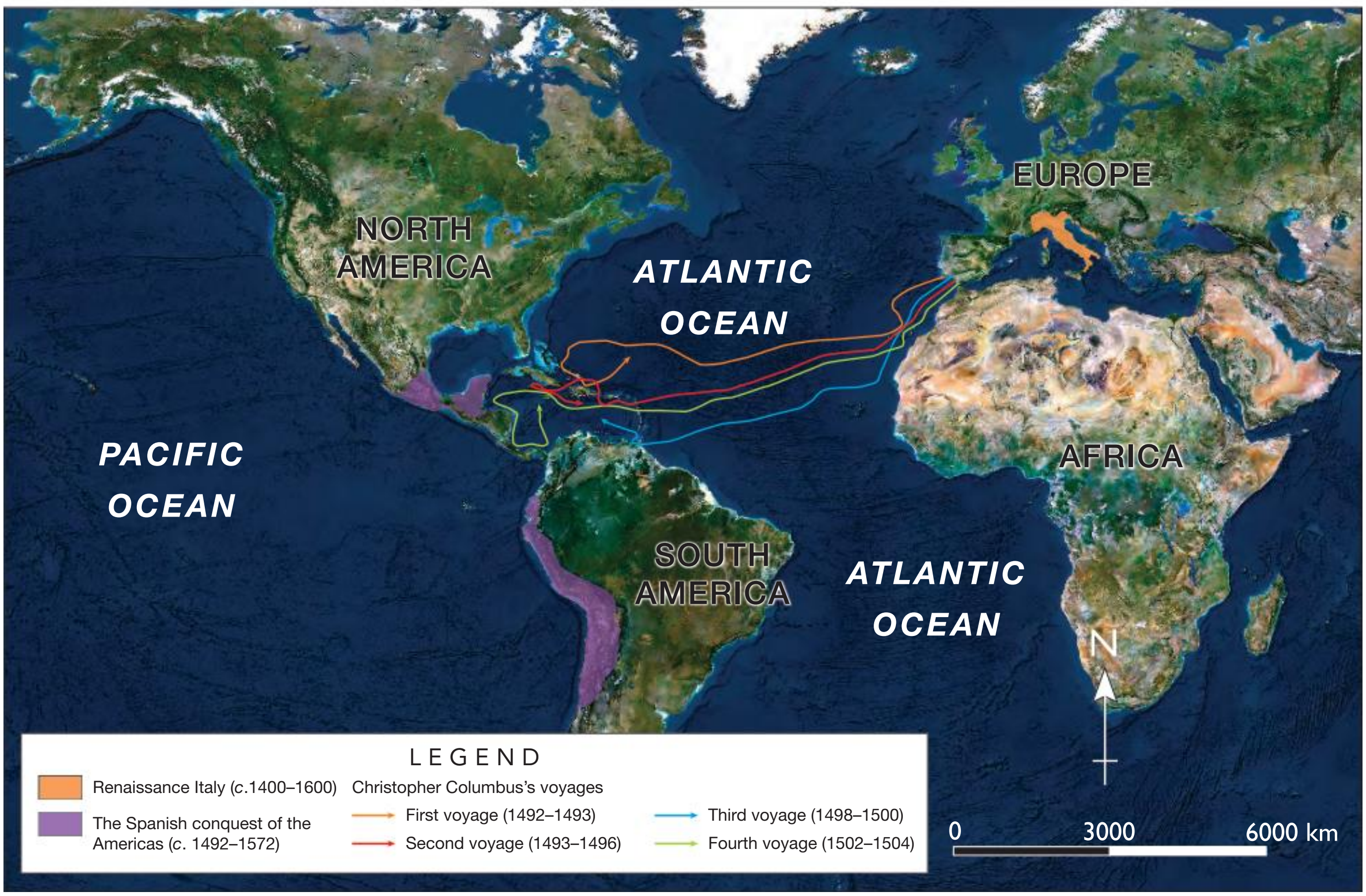
Renaissance
a period in Europe's history between the late twelfth and sixteenth centuries that saw a revival of culture and learning; a French term meaning 'rebirth'

In this unit, you will be learning about a number of different civilisations and events that took place across Europe and led to a period of discovery, colonisation and exploration. To help you get a better understanding of these civilisations and events, it helps to look briefly at some of the factors that were common to them and think about how their development was linked.

The satellite image of the world in Source 1 shows key civilisations and events that you may be learning about in this unit:

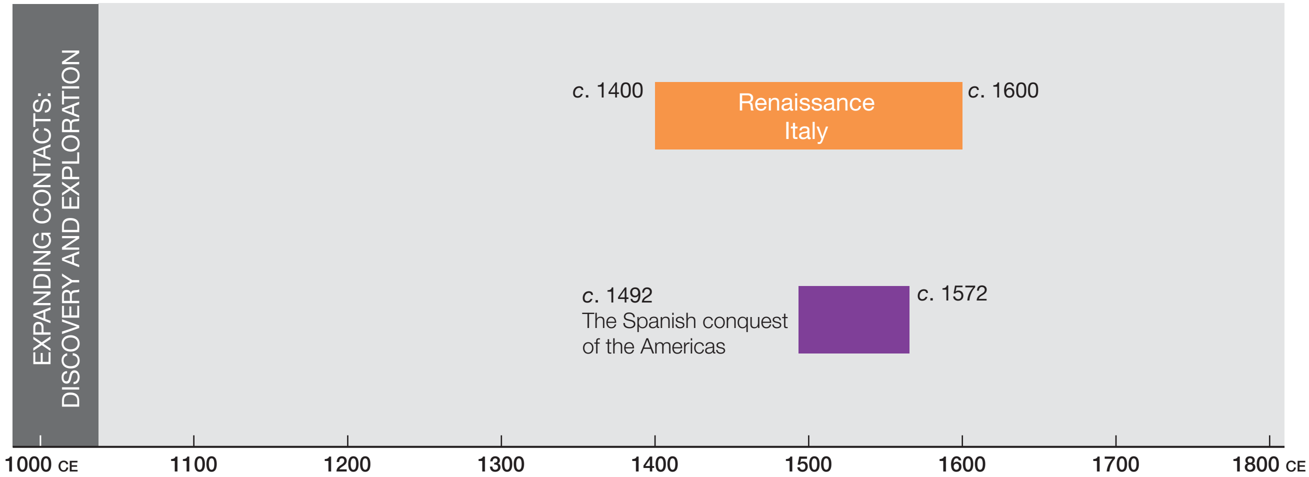
- the location of a group of separate city-states in Italy where the **Renaissance** started; these city-states were independent walled cities (sometimes including surrounding farmland) that governed themselves and had their own rulers

KEY EVENTS AND CIVILISATIONS OF EUROPE'S AGE OF DISCOVERY AND EXPLORATION



Source: Oxford University Press

Source 1 This satellite image of Earth shows key civilisations and events that took place during Europe's age of discovery and exploration.



Source 2 This timeline shows the key dates of Europe's age of discovery and exploration.

- the routes of the four voyages taken by explorer Christopher Columbus from Spain to the Americas; Columbus was an Italian hired by the Spanish royal family to discover new lands and wealth
- the areas of South America that were taken by Spanish **conquistadors** and colonised by Spain; before the arrival of the Spanish, there were two dominant empires there:
  - the Aztec Empire – in the southern part of what is now Mexico
  - the Inca Empire – along the western side of South America, stretching from what is now Ecuador in the north to Chile in the south).

The dates for this period of discovery and exploration are shown in the timeline (Source 2).

Source 3 This lithograph from an 1892 painting shows Spanish conquistador Hernán Cortés in battle, Tlascala, modern-day Mexico, 1519.

conquistadors (pronounced con-kees-ta-dors) a Spanish word for soldiers or conquerors

Quiz me! A quick quiz on the where and when of expanding contacts

17.1 CHECK YOUR LEARNING

Review and understand

1 What is a 'city-state'?

2 **Identify** the job of Christopher Columbus, and who gave him this job.

3 **Identify** the locations of the Inca Empire and the Aztec Empire before the Spanish arrived.

4 Look carefully at Source 1 and complete the following tasks:

  a **Identify** how many voyages Columbus made during this time.

  b In what direction did Columbus set sail from Spain?

  c What ocean did he sail across to reach the Americas?

Apply and analyse

5 **Explain** what is meant by the Spanish word 'conquistador'. What does this word tell you about the attitude of the Spanish towards local peoples living in the Americas at the time?

17.2 Key factors leading to the age of discovery and exploration

In this topic, you will:

- identify the belief systems that led to the age of discovery and exploration
- describe the structure of societies throughout the age of discovery and exploration.

Scientific revolution

Belief systems and religions were among the main reasons for Europe's age of discovery and exploration. Towards the end of the medieval period in Europe, religious teachings and the authority of the **Catholic Church** still influenced almost every aspect of daily life. In fact, religious beliefs and values were often among the main reasons why **societies** in Europe decided to do the things they did – like go to war and expand their power and control. A dedication to Christian beliefs – specifically the belief that their actions were the will of God – was a very powerful motivator for some European rulers. However, from around 1400 onwards, people began to question the authority of the Church, and a number of significant changes took place.

Catholic Church
the only Christian church in Europe until the Protestants started breaking away from Rome in the sixteenth century

societies
groups of people who organise themselves to best survive in their environment

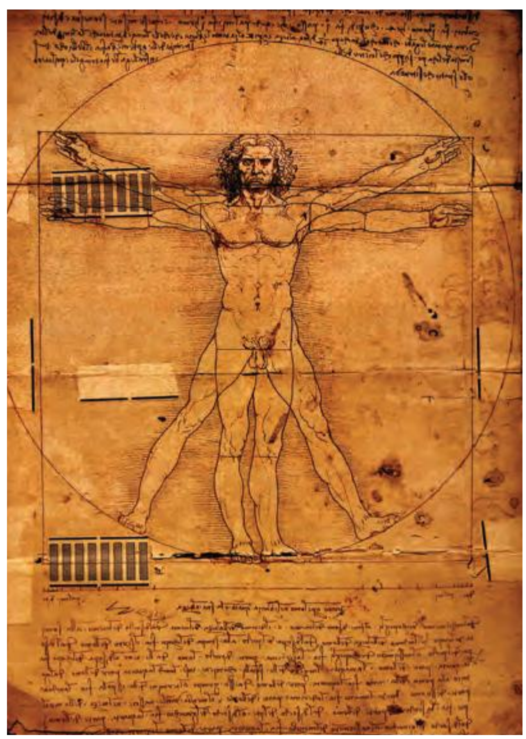
Belief systems and religions

Renaissance Italy

During the medieval period in Europe, the country we now know as Italy was made up of a collection of independent cities known as city-states. Each of these city-states had separate rulers and was independent. There were big differences in the way each of these city-states was ruled, but their rulers and people all had one thing in common – the belief in a Christian god.

Hundreds of years before the formation of these city-states, in around 394 CE, the Roman **emperor** Constantine had converted to Christianity and made it the official religion of all people living in the Roman Empire. From this time onwards, the Roman Catholic Church began to control many aspects of life in Italy. The spiritual leader of the Church – the Pope – was based in Rome. From around 1400 though, people in many different city-states began to question the authority of the Church.

emperor
someone who rules an empire; an empire is a group of countries and/or areas often speaking different languages and having different cultures, but centrally ruled

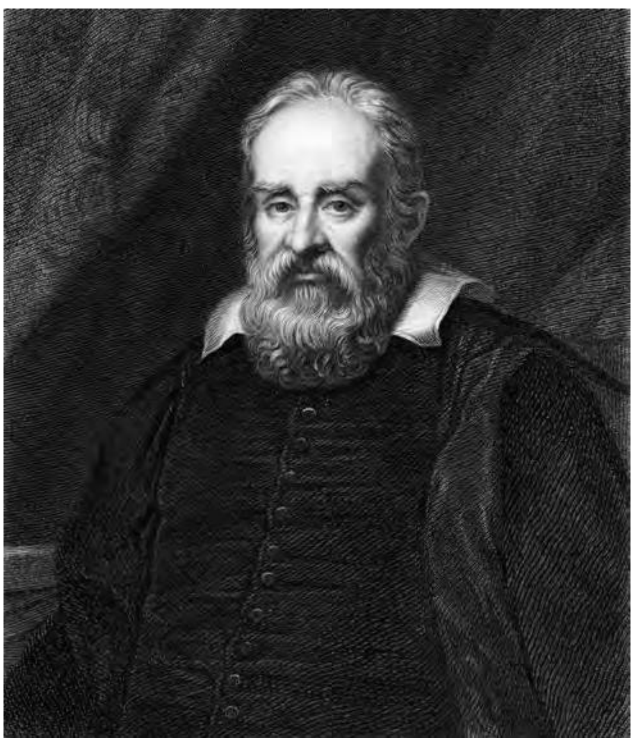


Source 1 During the Renaissance period, the study of art, law, philosophy, science and music began to challenge the teachings and long-held authority of the Church. Leonardo da Vinci is perhaps the most famous thinker of the Renaissance. In this drawing of the Vitruvian Man, he examined the relationship between geometry and the human body.

Although people still had a strong faith in God, they became more critical of the amount of power and wealth controlled by the Church. Some people became interested in seeking the answers to spiritual questions through the study of art, philosophy, science and music. This period became known as the Renaissance – a French word meaning 'rebirth'. The Renaissance period across the Italian city-states eventually led to a number of other movements such as:

- *humanism* – a group of philosophies centred on the importance of human beings, values and evidence, rather than gods, religions and supernatural matters
- the *Scientific Revolution* – a change in thinking among sixteenth- and seventeenth-century European scholars (academics) that placed a new focus on the laws of science and the natural world rather than the spiritual world
- *the Enlightenment* – a school of French-inspired thinking that spread through Europe in the eighteenth century; its view was that reason, tolerance and equality should replace superstition, cruelty and injustice
- *the Reformation* – a movement that began in Europe in the sixteenth century when the scholar-monk Martin Luther publicly challenged the Catholic Church; it shifted the balance of power in Europe away from dominant control by the Church.

Each of these movements changed or reduced the power and influence of the Church in their own way.



Source 2 Galileo Galilei was one of the key thinkers of the Scientific Revolution. He proved the theory that the sun was the centre of the universe.

Source 3 As part of the Reformation, Martin Luther challenged the Catholic Church, and went on to establish the Lutheran Church.

The Spanish conquest of the Americas

Black Death
a deadly plague that spread across Asia, Europe and Africa during the fourteenth century

Silk Road
a network of trade routes stretching west from China to the Mediterranean Sea; it was the main means by which silk was introduced to the West

As populations slowly recovered from the horrors of the **Black Death** in Europe, the search for new trade routes began. By this time, the Mongol Empire had broken apart and existing overland trade routes, such as the **Silk Road**, were no longer safe to use. Without the security and stability of Mongol rule, travellers and merchants traversing land were now being regularly attacked and robbed. As a result, a new generation of European explorers began to set sail across uncharted oceans. By the early fifteenth century, an age of exploration and discovery had begun.

In 1492, explorer Christopher Columbus sailed west seeking a safer and more direct passage to Asia. The Catholic king of Spain, Ferdinand II, funded the voyage hoping to gain control of the spice trade. On this first voyage, Columbus found the area now known as the Bahamas, beginning the Spanish conquest of the Americas.

Before the arrival of the Spanish, there were two dominant empires in the Americas – the Aztec Empire and the Inca Empire. At this time, the spiritual beliefs of both the Aztecs and the Inca influenced all levels of their societies. The Aztecs believed that nature and human activities on Earth were controlled by many different gods and spirits. Many of these gods were greatly feared by the Aztecs, so they made offerings to please them. For example, in order to keep the sun shining and the earth fertile, most people performed blood-letting ceremonies in their homes – cutting themselves and letting their blood drip onto the earth. In addition to this, the Aztecs believed that it was necessary to perform public human sacrifices to please the gods. Large, tiered temples were built specifically for this purpose. The beating hearts of victims were cut out of their chests and their bodies were thrown down the steep stairs of the temple.

Source 4 Machu Picchu, an Incan citadel located high in the Andes Mountains in Peru, is a popular tourist destination in modern times.

Source 5 This image of an Aztec religious ceremony by a Spanish artist shows the beating heart of a human sacrifice being offered to the sun god. When the Spanish arrived in the Americas in the fifteenth century, they regarded both the Aztec and Inca people as godless savages. They saw it as their religious duty to convert them to Christianity.

The Inca believed that their ruler, known as the Sapa Inca, was the direct descendant of the sun god, Inti. He had absolute power over his subjects. Like the Aztecs, Inca beliefs were closely tied to nature. The first Inca ruler was believed to be a god who was sent to Earth to teach humans how to farm, use weapons and worship. The Inca also made offerings to the gods; however, human sacrifices were extremely rare. Instead, animals were sacrificed. The Sapa Inca would also offer golden cups of maize (corn) beer, cocoa leaves and holy bread to the sun god.

When Spanish conquistadors arrived, they saw both the Aztecs and the Inca as primitive barbarians. The Spanish brought very strict Catholic beliefs with them to the Americas and set about converting the indigenous peoples. They saw this as not only their duty to God, but also their right as cultured and educated people. Spanish missionaries built permanent settlements to educate the indigenous peoples and 'save their souls'.

In addition to converting the indigenous peoples to Christianity, the Spanish enslaved large sections of the population, **plundering** the cities and murdering anyone who resisted them. Many indigenous people believed their own gods had abandoned them. They saw the Spanish conquest and devastating loss of life from European diseases as a sign of this. As a result, large numbers converted to Christianity.

plundering
stealing, often using violent force

Some Spanish missionaries saw how terribly indigenous peoples were being treated and called for an end to slavery.

Governments, laws and social structures

Renaissance Italy

As we have seen, during the medieval period in Europe, the Italian Peninsula was divided into a number of independent city-states. Each one had its own ruler and government. These city-states had formed over time as a result of marriages, political alliances (agreements) and conflicts. As a result, each developed its own system of government. For example, some were ruled by kings, others were ruled as **republics**, and others were ruled by the Pope. These city-states often changed borders and there were many changing political alliances between the Church, ruling families and merchants (who formed powerful organisations known as **guilds**). Source 6 outlines some key city-states in Italy.

republics
systems of government in which the power lies with a group of elected officials rather than a king or queen

guilds
groups of people all working in the same trade (e.g. butchers, tailors, cobblers) who band together in support of their common interests

Source 6 City-states of the Italian Peninsula during the fifteenth century

Name of city-state	Features of government
Kingdom of Naples	The only city-state to officially have a king
The Papal State	Rome – governed by the Pope as head of the Roman Catholic Church
Duchy of Milan	Ruled over by a duke
Two republics: Florence and Venice	Governed by elected representatives: • a council called the *signoria* in Florence • a leader (elected for life) and a council in Venice

During the Renaissance, wealthy citizens in some city-states showed off their money and power by becoming supporters (known as 'patrons') of artists and intellectuals. Because of this support, thinkers and scholars did not have to take ordinary jobs; instead, they travelled around Italy, studying ancient ruins and rediscovering ancient Greek and Roman texts.

Source 7 During the Renaissance period, the Italian Peninsula was divided into several city-states. This fifteenth-century woodcut shows one of those city-states, Florence, at the height of the Renaissance.

Italian merchants and bankers brought back exotic goods from their travels, as well as ideas from ancient classical texts they found preserved in the great libraries of ancient cities such as Constantinople in Turkey. Also, when Constantinople fell to the Ottoman Empire in 1453, many Greek scholars – who had been based there – fled and found safety in Italy. The ideals and values of ancient classical philosophers, politicians, poets and writers inspired and encouraged the thinkers of Renaissance Italy. Scholars studied and discussed these ideals, and applied them to their own world, influencing governments, laws and social structures.

The Spanish conquest of the Americas

The Spanish conquest of the Americas had a huge impact – not only for people in Spain and the Americas, but for those all around the world. For the indigenous peoples, the Spanish conquest had a devastating effect on societies in the Americas – almost completely destroying the Aztec and Inca cultures.

The populations of both societies were nearly wiped out through the battles they fought against the Spanish and by the spread of diseases the Spanish brought with them from Europe (such as smallpox), to which they had no immunity.

Source 8 This artwork, painted in 1519, shows Aztecs being massacred by Spanish soldiers.

The consequences of so many deaths were drastic. People's faith in their traditional religions and leaders was severely weakened. The deaths also had economic impacts. The Aztecs and Inca lost vast numbers of skilled citizens, such as craftspeople and farmers. There were severe labour shortages, and it became difficult to grow and harvest crops to feed the population.

While it was devastating for the Aztecs and Inca, the Spanish conquest of the Americas was a hugely positive development for Spain. The riches discovered in the Aztec and Inca Empires created huge wealth for the Spanish king, and the success of the conquests made Spain a powerful force in Europe.

In addition to being rich sources of precious metals such as gold and silver, Spanish colonies in the Americas provided slaves and labour; but because so many indigenous people in the Americas had died from disease or battles with the Spanish, slaves were brought from Africa to work on plantations and in mines. This was the beginning of the transatlantic slave trade that would continue until the nineteenth century.

Conquest and colonisation also allowed the Spanish king to gain more wealth through taxes. By colonising the Americas, the Spanish continued to make money by taxing the local population, rather than just taking their treasures and leaving.

New World
a term that started being used by Europeans in the late 1400s for the new lands (the Americas) being discovered

The **New World** (as it became known) was also an important source of crops for Spain and for Europe. Many crops that we take for granted around the world today had never been seen in Europe until they were brought back from the Americas. These included chocolate, tobacco, potatoes, tomatoes, bananas, chilli, corn, turkey, pumpkin, rubber, avocado, peanuts, vanilla and pineapple. Some of these crops, such as tobacco, were extremely valuable in monetary terms. Others, such as potatoes, were valuable for improving the nutrition of Europeans. Potatoes could yield more calories per acre than anything Europeans had grown before, providing a great source of energy. In addition, foods such as tomatoes and chillies were rich sources of vitamins. In the Mediterranean, such foods enriched diets and improved the health of the population.

Quiz me!
A quick quiz on key factors leading to the age of discovery and exploration

These improvements in health and nutrition helped to trigger population growth in Europe. They were critical to the advancement of European civilisations after this time.

Source 9 European explorers brought back many crops from the Americas, including potatoes, tomatoes, bananas and avocadoes. These crops are now common all around the world.

KEY CONCEPT
Evidence

Empathy and evidence

Evidence is the information gathered from historical sources. Evidence can be gathered from primary sources (objects created at the time being investigated) or secondary sources (accounts about the past that were created after the time being investigated).

When examining historical evidence, it can be useful to look at it with **empathy**. Empathy is an appreciation of the different situations people face, and it can help us understand the motivations of individuals or groups of people.

Look closely at Source 10. This painting depicts the landing of Christopher Columbus in San Salvador on 12 October 1492. This source was painted by a European painter approximately 300 years after the scene shown in the painting took place.

Using empathy, we might consider the circumstances of the painter, and the impact these circumstances have on this painting as a historical source. Some

empathy
appreciation of the circumstances people faced in the past, and the motivations, values and attitudes behind their actions.

questions we might ask about the painter include: What was the painter's motivation in depicting this scene? What values was the painter likely to have? What attitude might he have had towards the group of indigenous people shown? What attitude might he have had towards Christopher Columbus? How might these motivations, values and attitudes have influenced the way the he painted this scene, given that he wasn't there at the time?

For more information on this key concept, refer to page 201 of ‘The history toolkit’.

Source 10 An oil painting titled *First Landing of Christopher Columbus*, created by German painter Frederick Kemmelmeyer in the seventeenth century

17.2 CHECK YOUR LEARNING

Review and understand

1 What is the meaning of the word ‘renaissance’? In your own words, **describe** what happened during the Renaissance period in Italy.

2 **Identify** three philosophical and scientific movements that rose from the Renaissance period in Italy.

Apply and analyse

3 **Explain** what motivated people in Europe to look for new trading routes by sea, rather than by land.

4 a **Summarise** the effect that the Spanish colonisation of the Americas had on the Aztec and Inca peoples.

b Can you think of another example of a European power colonising a country with similar effects?

c It is often said that history is written by the victors. With a partner, **discuss** what this statement means and how it might relate to the experience of the Aztec and Inca peoples after being colonised.

CHAPTER 18

Renaissance Italy

The Renaissance was a period of great change that began in Italy around 1400. The term 'renaissance' comes from a French word meaning 'rebirth'. Over time, it came to describe a historical period that promoted a culture of learning.

The work of ancient philosophers, poets and writers from Greece and Rome inspired thinkers during the Renaissance period. Renaissance scholars studied these ideas and gave them new life by applying them to their own world. They also developed exciting new theories and inventions that changed our approach to art, music, architecture, science, politics, literature, religion and technology. These new theories and inventions had one common theme – the belief that humans were the centre of the universe. Although the Renaissance period began in Italy, over time these new ideas spread across Europe and the world.

By around 1600, the Renaissance period was coming to an end and the modern world was born.

Source 1 Festivals and pageantry in Florence are still important traditions, originating from the time when this cultural capital was the heart of the Renaissance.

18A
Why did the Renaissance develop?

18B
How was society organised during the Renaissance in Italy?

18C
What were the greatest achievements of the Renaissance and how did they influence the rest of Europe?

18.1 Renaissance Italy: A timeline

Andreas Vesalius, considered to be the founder of modern anatomy

1397
Giovanni de Medici moves to Florence. He becomes involved in Florentine public life and begins supporting the arts, laying the groundwork for the Medici family's rise to power.

1434
The Medici family – a powerful family of bankers, politicians, monarchs and religious figures – gain control of the ruling council in the Republic of Florence.

1450
Johannes Gutenberg, a German goldsmith, invents the printing press. It allows information to be spread to a wide population.

1390 CE | 1410 | 1430 | 1440 | 1450 | 1490

1413
Filippo Brunelleschi develops the geometrical theory of 'perspective', changing the nature of art dramatically.

1436
The dome of Florence Cathedral is completed; it is designed by one of the most important architects and engineers of the Renaissance, Filippo Brunelleschi.

1455
The Italian League is formed between the five big city-states, providing protection and peace for 40 years.

1452
Leonardo da Vinci, a renowned intellectual in many fields – including painting, engineering, music, anatomy, biology and sculpture – is born near Florence.

The *Mona Lisa*, believed to have been painted between 1503 and 1506

Source 1 A timeline of some key events during the Renaissance

Sequence this!
Key events in Renaissance Italy

1498
The Medici family flee Florence after losing their power. They will return in 1512, and their dynasty will continue until the eighteenth century.

1500

1501
The city of Florence commissions Michelangelo's sculpture of David. It is completed in 1504.

1508
Commissioned by Pope Julius II, Michelangelo starts painting the walls and ceilings of the Sistine Chapel in the Vatican. His work is completed in 1512.

1510

1513
Italian historian, philosopher and politician Niccolò Machiavelli writes *The Prince*. Desiderius Erasmus, a Dutch theologian and priest, publishes 'In Praise of Folly', an essay criticising established religion.

1517
Martin Luther publishes his 95 theses.

1519
Leonardo da Vinci dies. He leaves behind paintings such as the *Mona Lisa* and *The Last Supper*.

1520

1527
The imperial army attacks the city of Rome after Pope Clement VII refuses to pay a ransom. The city is taken in just over 12 hours in what would become known as the 'sack of Rome'. This symbolises the beginning of the decline of Renaissance Italy.

1528
Baldassare Castiglione publishes *The Book of the Courtier.*

1540
Nicolas Copernicus, a mathematician and astronomer from the kingdom of Poland, publishes a book outlining his radical theory that the sun is the centre of the universe, not the Earth. Andreas Vesalius, a Belgian anatomist and physician, publishes *On the Structure of the Human Body.*

1550

1558
Elizabeth I becomes Queen of England.

1590
Shakespeare writes his first play, *The Two Gentlemen of Verona.*

1610
Italian physicist and astronomer Galileo Galilei develops the first telescope capable of observing the moon and planets. In 1632, he goes on to publish a book confirming Copernicus' theory that the Earth revolves around the sun.

1610 CE

A painting of Galileo explaining his observations about the moon

Desiderius Erasmus, a Dutch theologian, was critical of established religions.

18.1 CHECK YOUR LEARNING

Review and understand

1. **Identify** who commissioned Michelangelo to paint the Sistine Chapel.
2. Who were the Medici family and why were they important?

Apply and analyse

3. **Examine** the painting of the *Mona Lisa*. What do you think it shows about the subject's nature and personality? Refer to features of the painting in your answer.

Evaluate and create

4. Copernicus' theory that the sun rather than the Earth was the centre of the universe caused him to be criticised and ridiculed. As a class, brainstorm why he received this response.

18.2 Causes of the Renaissance

In this topic, you will:

» examine the social, economic and political changes that caused the Renaissance.

The **Renaissance** was a complex movement that began in the late Middle Ages. It was a time of great change and progress, and a number of Italian thinkers in the late fourteenth century declared it a new age of learning, literature, art and culture. Historians now think the Renaissance began as early as 1340, though it was not acknowledged as a historical period until the eighteenth century.

The Renaissance did not develop from a single cause, but its many developments all shared a common theme – that humans were the centre of the universe. This was a shift away from the beliefs of Christianity that dominated during the medieval period.

Renaissance
a period in Europe's history between the late twelfth and sixteenth centuries that saw a revival of culture and learning; a French term meaning 'rebirth'

Crusades
a series of wars fought by Christians and Muslims between 1096 and 1291 CE over control of the Holy Land

The revival of trade and the growth of towns

During the Middle Ages (also known as the medieval period), people in Europe did not know much about the world around them. However, the **Crusades** in the twelfth and thirteenth centuries introduced Europeans to Asian and Middle-Eastern products, including spices, silks, perfumes and pottery. Improved land and sea routes to the East were opened up, better and stronger ships were built, and skills in navigation improved. These influences led to a great increase in trade.

It was not only new products that were brought to Europe, but also new ideas. Trading centres in Italy flourished and a merchant class grew, making their money from transporting and selling goods. More people began to move into towns, where they could share skills and ideas. These changes paved the way for other social and cultural changes, as the Renaissance unfolded.

secular
not connected to religious or spiritual matters

manuscripts
in the medieval sense, documents written by hand (usually by monks)

The Black Death

In 1347, a plague known as the Black Death reached Europe, killing up to one-third of the population. The disease was spread by fleas carried by rats, and it was probably brought from the east on trading ships. The Black Death had a devastating effect on the population in rural areas, leading to a decline in food supplies. Many of those who survived the plague moved to the developing towns. The death and suffering experienced during the Black Death also led some people to question the teachings of the Catholic Church. This contributed to the more **secular** approach to life that developed during the Renaissance.

Source 2 This manuscript image was drawn in 1349, during the Black Death. It shows people carrying coffins of those who had died.

The printing press

In the Middle Ages, monks were among the few people who could read and write. Monasteries housed rare **manuscripts** that monks had copied by hand. Most of the manuscripts – written in Latin – were religious. Learning was mostly controlled by the Church.

This changed in 1450 when a German goldsmith, Johannes Gutenberg, invented the printing press. Now, new and classical texts could be mass-produced. The invention of printing was probably the most important factor contributing to the spread of Renaissance culture and ideas across Europe. Printed books encouraged people to learn to read and gain more knowledge.

The fall of Constantinople

In 1453, the city of Constantinople in modern-day Turkey was invaded by the Ottoman Empire. Greek scholars – who had kept classical learning alive in Constantinople during the Middle Ages – fled to Italy, taking with them documents and manuscripts from ancient Greece and Rome. These scholars contributed to the revival of interest in classical learning that influenced much of the culture of the Renaissance.

All of these influences led to the development of the vibrant and creative period known as the Renaissance. As the movement spread, the ideas and inventions inspired more and more expression and development.

Source 3 An artist's impression of Johannes Gutenberg in his workshop showing his first sheet of printed text

Source 4 The Piccolomini Library at the Cathedral of Siena houses a wide range of books and manuscripts. It was a Renaissance ideal to have a library attached to a place of worship that promoted learning and artistic expression.

Key skill worksheet
Analysing cause & effect: The Renaissance period

18.2 CHECK YOUR LEARNING

Review and understand

1 In your own words, **define** 'Renaissance'.

2 **Describe** the role that the fall of Constantinople played in the revival of classical learning.

3 How did the Black Death come to Europe?

Apply and analyse

4 **Explain** the changing perspective towards religion that fuelled Renaissance thinking.

5 **Summarise** why the invention of the printing press was so important.

Evaluate and create

6 Examine all of the influences on the emergence of the Renaissance covered in this topic. List them in order of importance, and write a short paragraph to **justify** (give reasons for) your choice of the most important one.

See, think, wonder

Look at Source 4.
- What do you see?
- What do you think?
- What do you wonder?

18.3 City-states of Renaissance Italy

In this topic, you will:

» explore the political organisation of Renaissance Italy into city-states

» analyse the economic growth and cultural development of city-states in Renaissance Italy.

mercantile connected with trade, merchants and commercial or business affairs

Italy became a powerful trading nation due to its central location within the Mediterranean Sea. Italy is located between four regions – Europe, Asia, the Middle East and northern Africa – and is mostly surrounded by coastline. This meant that many ports could be used for the transport of goods by sea.

As trade opportunities grew, **mercantile** cities became powerful enough to separate themselves from towns under the Holy Roman Empire.

The growth of city-states

Renaissance Italy was not a united country, but rather a group of over 30 city-states (the main ones are shown in Source 5). A city-state is a city and surrounding area that is self-governed. Some city-states were led by the Pope, some were led by kings, and others were influential republics (governed by elected officials) where wealthy families were in charge. Each city-state had the right to:

- form its own laws
- maintain an army
- manage its economy
- devise its own foreign policy.

MAIN CITY-STATES OF RENAISSANCE ITALY

Duchy of Milan (ruled by dukes): the city of Milan was situated at a crossroads on the main trade routes joining port cities on the coast to other parts of Europe. It prospered from both the silk trade and the wool trade.

Republic of Genoa (governed by an elected council and led by the *doge* – a chief elected ruler): it was a major trade route and grew its wealth from its strong banks. It was the birthplace of Christopher Columbus. Genoa and Venice had a bitter rivalry.

Republic of Siena (governed by influential families): Siena thrived from its banking, having the oldest bank in the world. It had a rivalry with neighbouring Florence.

Republic of Venice (ruled by an elected council led by the *doge*; this council was dominated by influential merchants): Venice was an important link between Western Europe and eastern trade ports, attracting traders from around the world. It was the birthplace of Marco Polo.

Republic of Florence (governed by an elected council, the *signoria*, which was dominated by influential families): the cloth-making industry and banking were important to its economy. The city of Florence was the cultural centre of Renaissance Italy, bustling with artists. Its population reached over 80 000.

The Papal States (territories around the city of Rome, governed by the Pope, who was also head of the Church): with the Vatican City at their heart, these territories became a hub for artists and scholars wishing to study the ancient classics. The concept of humanism flourished in the Papal States.

Kingdom of Naples (the only city-state to officially have a king): it had one of the world's oldest universities, and attracted scholars of the Renaissance. The kingdom split and reunified with Sicily for brief periods.

Source 5 Source: Oxford University Press

Influence of the Crusades

Most city-states were in northern and central Italy. The coastal towns in this region had developed as important trade and transport hubs during the Crusades. Soldiers travelling from Western Europe would seek accommodation there, and pay for travel by ship to the **Holy Land**. The towns also benefited from new ideas, produce and processes brought by soldiers as they returned from the East.

With exposure to the mathematical knowledge of the Middle East, northern Italy became a highly numerate (mathematically competent) society. Many city-states developed strong accounting practices to strengthen trade there. By the thirteenth century, the region was also one of the most literate societies in the world, with one-third of the population's men (and a small number of women) being able to read.

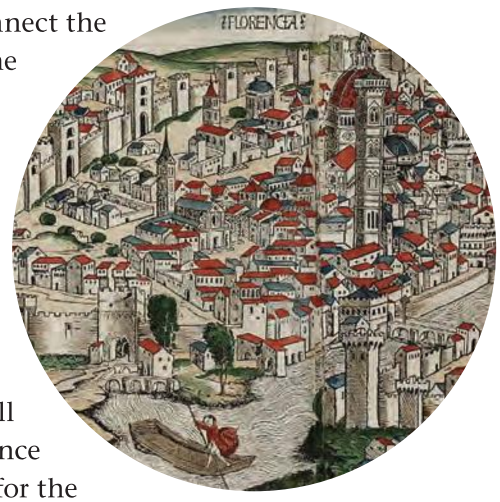
Holy Land
territory in the Middle East (now mostly made up of Israel and Palestine) that is important to the Christian, Jewish and Muslim religions

Silk Road
a network of trade routes stretching west from China to the Mediterranean Sea; it was the main means by which silk was introduced to the West

Trade

Italian port cities on the Mediterranean Sea were in the best position to connect the **Silk Road** to the rest of Europe. As a result, city-states such as Venice became rich and powerful. For a time, they had an almost exclusive trade of silk.

Trade rivalries, conflicts and even wars occurred between city-states as they competed for control over certain trading posts throughout the Mediterranean region. As a result, smaller city-states were sometimes overthrown by their larger neighbours.



Source 6 A 1494 woodcut by Hartmann Schedel of Florence, a major city-state during the Renaissance

Culture

Each city-state had its own character and culture. Those in the north-west were known for banking and their wool industry (Milan, for example, is still seen as a fashion capital of the world). In central Italy, the Republic of Florence became the hub for art and commerce. The Papal States were a destination for the growing interest in the humanities and the ancient classics found in Rome.

In the south, the Kingdom of Naples welcomed open debate and scholars to the imperial court. In 1224, a university was opened there. It became an important hub for knowledge, science and technological innovation.

18.3 CHECK YOUR LEARNING

Review and understand

1 In your own words, **define** 'city-state'.

2 **Identify** three elements of control that a city-state had over its territory.

Analyse and apply

3 **Explain** the significance of the geography of the Italian peninsula in establishing the city-states.

4 Which aspect of society in city-states do you think was most important: the influence of the Crusades, trade or culture? Give reasons for your answer.

Evaluate and create

5 Trace the map in Source 5. Conduct some **research** and add the following:

   a the location of the main city in each city-state

   b three additional annotations to show particular points of interest in Renaissance Italy (such as universities or Vatican City).

6 **Create** a concept map that shows the growth of the city-states. Include branches of each city-state's specialty trade products and cultural developments. Create a network by thinking about connections between various branches.

18A RICH TASK

Quizlet

Revise the key terms you have learnt so far.

The Italian League

In Renaissance Italy, certain city-states became major political and economic powers. As such intense rivalries, competition and even wars occurred between city-states, ongoing conflict made the formation of treaties and alliances necessary.

In 1454, Milan and Venice entered into the Treaty of Lodi to end a costly war and agree on their boundaries. Following this, three more city-states decided to unite in peace under the Treaty of Lodi, to form an agreement called the Italian League. This agreement stated that if one league member attacked another, the other city-states would provide military aid to fight the attacking city-state. This support was also required if a city-state was attacked by an outside force.

The creation of the Italian League brought 40 years of peace to Italy. In 1494, however, the terms of the league were broken when the Kingdom of Naples prepared to attack the Duchy of Milan. In response, Milan invited the French king to launch his troops against Naples. Venice and the Papal States persuaded the Spanish King Ferdinand to help resist the French, and Italy fell into war once again.

Republic of Venice | Republic of Florence | Duchy of Milan | Papal States (Rome) | Kingdom of Naples

Source 8 The coats of arms for the five main city-states in Renaissance Italy

Source 9 A view of Venice painted by Gaspar van Wittel in 1697, showing the famous Grand Canal

Source 7 A view of modern-day Venice

KEY SKILL
Communicating & reflecting

Creating and delivering an audiovisual presentation

Audiovisual presentations are a good way to communicate the findings of your research, using visual and audio sources to engage your audience. Follow these steps:

Step 1 Develop a key inquiry question (or questions) to explore. Make a list of points you will need to cover. If it is a group presentation, make sure that the workload is shared evenly.

Step 2 Gather your research. Find and collect a range of reliable primary and secondary sources that will help you answer your question. Make sure you record the reference details.

Step 3 Plan and create your presentation to address the key inquiry questions. Decide on the format; for example, PowerPoint, Prezi, a short film, a website or a talk supported by a poster.

If you are developing a slideshow, aim for a few short dot points of key information on each slide, which you will elaborate on by speaking. Make sure your slides are readable in terms of colour, backgrounds and font size.

Step 4 Deliver your presentation.

- Rehearse your presentation so that you can deliver it with confidence. Point to features within images, or explain maps and graphs in detail, before moving on to the next topic.
- Engage your audience by speaking slowly and clearly, and making eye contact. Pause for 10–20 seconds to allow the audience time to read your information and look carefully at images.
- Prepare for the worst by having a back-up plan in case technology lets you down.
- Finish strongly. Your presentation should finish on a high note.
- Encourage your audience to comment or ask questions at the end of the presentation.

For more information on this key skill, see page 218 of 'The history toolkit'.

Practise the skill

Follow the steps above to develop an audiovisual presentation on the significance of one of the five main Renaissance city-states, and the way of life there.

1 Develop a series of inquiry questions to guide your research. Some ideas to start from include:
   - geographical information – size, location, population, map
   - political framework – type of government, its structure, key rulers, legal matters, policies
   - interactions with other city-states – alliances, rivalries, agreements, wars
   - economy and society – produce traded, cultural developments, work, education

2 **Research** and collect a range of information from a variety of sources (such as pictures, music, videos, interviews and short quotes).

3 Rehearse your presentation and present your finished product to the class.

Extend your understanding

1 Work with other students who are studying the same city-state as you, and **create** a tourism marketing campaign. This is a great way to highlight the most significant features of a historical place and time. Explain why a tourist during this period should visit your city-state. Create a slogan or jingle that you think captures the essence of the city-state.

   Take a vote after the presentations to see which city-state would be the most popular destination.

2 Using empathy (see page 213 of 'The history toolkit'), imagine what it would have been like to live in one of the city-states. Write a diary entry or letter to capture aspects of daily life and features of the city-state.

18.4 The social structure of Renaissance Italy

In this topic, you will:

» distinguish between key social groups in Renaissance Italy.

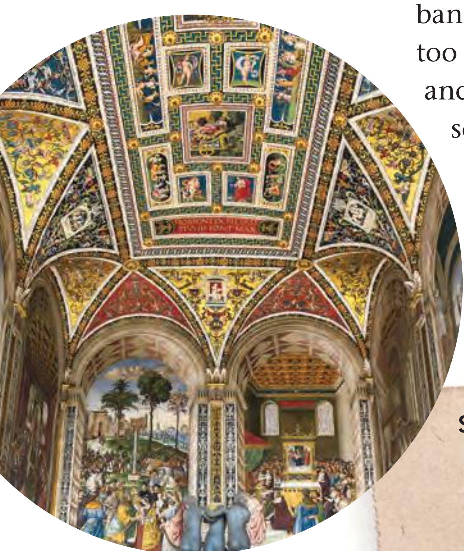
artisans
skilled workers in a specialised trade or craft

In Renaissance Italy, people's experience of everyday life varied greatly. Wealth, gender and whether they lived in a town or the countryside all influenced the way that people lived.

Life for the wealthy in Renaissance Italy

People of noble birth were at the top of the social scale and originally ruled the city-states. They were known as the *grandi* (great men). However, wealthy merchants and bankers also enjoyed great power and status – especially in the republics, where they too could govern the city-state. This allowed them to live well, explore new ideas and participate in the general revival of interest in ancient Greece and Rome. In some cases, merchants and bankers implemented their own absolute, hereditary leadership – keeping the power within the family, just as the nobles had before them. Rich merchants and **artisans** were known as *popolo grasso* (fat people).

Nobles and great merchants such as the famous Medici family (see page 396) lived in luxury. They owned beautiful and elaborate palaces known as palazzos, where artistic and cultural gatherings were held.



Source 2
Palazzos often had extravagant ceilings with detailed paintings and gold trimmings.

Source 1

[Palazzos] are heavenly rather than earthly things, and everyone is agreed that this house is the most finished and ornate that the world has had or may ever have, that it is without comparison. In sum, it is believed by everybody that there is no other earthly paradise.

Comments of a foreign visitor after a tour in the 1450s of Cosimo de Medici's palazzo in Florence, in Professor F. W. Kent, '"A Paradise Inhabited by Devils": Florence in Fra Angelico's Day' in *Readings: Renaissance Florence*, HTAV, 1998, p. 49

The fifteenth century was a time of palace-building, and many were constructed in the hope of challenging or outdoing the extravagance of rival families. The construction of massive palazzo in the heart of a city such as Florence, for instance, was a demonstration of a family's power.

Most wealthy families also had luxurious villas in the countryside, where they entertained guests at great feasts, with music and poetry.

Life for the middle classes

Skilled workers – such as bakers, carpenters, blacksmiths, tanners (leather workers), masons, armour-makers and shop-keepers – occupied the middle rung of society in Italian city-states. Their homes were smaller and their streets narrower than those of the wealthy, but many of them lived in reasonable comfort.

Worksheet
Daily life during the Renaissance

Life for the lower classes

Unskilled and semi-skilled workers lived in the poorer parts of Italian cities, where the streets were narrow and the air unhealthy. Workplaces such as dye works, tanneries and slaughterhouses were situated in areas where unskilled workers both lived and worked. Children of the poor would work alongside their parents, or go out to work themselves from the age of seven or eight.

This section of the population was known as *popolo minuto* (little people). They were also sometimes referred to as *ciompi*, after the wooden shoes that they wore. They had no political rights, but on several occasions they rioted in protest at their bad living and working conditions. In Florence, the Ciompi Revolt in 1378 achieved some rights for workers, but only for a few years. The revolt was crushed by the *popolo grasso* in 1381.

Source 3 This illustration by Tancredi Scarpelli (1866–1937) shows wool worker Michele di Lando, one of the leaders of the Ciompi Revolt.

Life for the rural peasants

Peasants working on the land provided food for the cities and towns. They produced grains, meat, fruit and vegetables, cheese and wine. They also raised sheep to provide the fleeces that made Florence such an important centre in the wool trade.

The living circumstances of peasants varied. Some were no better off than workers in the cities. They lived mostly in tiny cottages, which they shared with their animals. However, most peasants had access to better food and cleaner air, and often they had a stronger sense of community.

All members of a peasant family worked side by side. Children would start work as soon as they were strong and skilled enough.

Source 4 This 1565 painting by Pieter Bruegel shows haymaking in July, as part of a series depicting the 12 months of the year on a farm.

18.4 CHECK YOUR LEARNING

Review and understand

1 In your own words, **define** the terms *popolo grasso* and *popolo minuto*.

2 **Identify** which social group each of the following would belong to: a butcher, a farmer, a shop-keeper, a wool merchant and a noble.

3 **Describe** the role peasants played in the social and economic organisation of Renaissance Italy.

Apply and analyse

4 **Analyse** Source 1 by answering these questions:

a Is this a primary or secondary source? How can you tell?

b What does this source tell you about the values of people in Renaissance Italy?

c Does this source include different perspectives, or is it biased (one-sided)? Why or why not?

Evaluate and create

5 **Create** a labelled pyramid diagram that shows the different levels of power, occupation and status in Renaissance Italy.

18.5 Women and children in Renaissance Italy

In this topic, you will:

» understand the roles of women living in Renaissance Italy.

The lifestyles of women and children in Renaissance Italy varied enormously, depending on wealth, class and where they lived. For example, the jobs available to a woman depended on whether she lived in the town or country and what her social status was (see Source 5).

Education

Sons of craftsmen or skilled workers could become **apprentices** – learning a craft or trade from a master craftsman. Boys were also educated at church-run cathedral schools, or at grammar schools established by town councils. Boys of the nobility were often educated by a tutor at home.

Girls from wealthy families were educated in convent schools or by private tutors. They learnt reading and writing, singing, needlework and often a musical instrument. However, there was no expectation that their education would be used in public life.

Both male and female children of peasants rarely received a formal education, and most were illiterate.

apprentices
young people who work for an employer for a fixed period of time in order to learn the particular skills needed in their job

Source 6 Isabella d'Este is an example of a Renaissance woman who challenged traditional female roles. She was well educated and enjoyed her power and influence, acting as a regent (temporary ruler) for her son and becoming a patron of the arts.

Jobs for women in Renaissance Italy

- **Lower-class women**
  - In the countryside, they herded animals and worked alongside the men in the fields.
  - In towns and cities, they worked as seamstresses, dyers and food processors.
  - A highly respected and well-rewarded occupation for women anywhere was that of a midwife.
- **Upper-class women**
  - They did not hold paid jobs.
  - Once they were married, they were expected to run the household and manage the servants.

Source 5 The jobs women held in Renaissance Italy varied greatly depending on their social status and location.

Marriage

Nobles and merchants aimed to marry their daughters into suitable families. The daughters themselves had little say in the matter, and by the age of 16 girls were often married to considerably older men. A dowry of money and/or property would be paid to the husband's family upon marriage.

Boys from wealthy families were urged to marry girls from the same social class and their marriages were usually arranged. Marriage was about creating good alliances for the family that would hopefully improve their social status, rather than love.

It was a woman's duty to produce many children – especially a male heir – to ensure the family **lineage** was maintained. A family-centred ideology was promoted in Florence to build a strong and prosperous society. After Florence lost 80 000 citizens during the Black Death, its government encouraged women to have many children to boost the population. The average number of children born to a woman was between five and seven. Up to half of all babies died at or before birth, and up to 10 per cent of women died in childbirth.

lineage
the series of families that a person comes from

Lucrezia Borgia (1480–1519)

Lucrezia Borgia came from a powerful family. The Borgia family became infamous as scandals of adultery, theft, bribery and murder followed them during the Renaissance.

Throughout history, Lucrezia's story has been contested (disputed). There are many rumours about her involvement with murderous acts – for example, that she plotted murder with her family or that she wore a hollow ring to hold poison.

However, historians debate the extent to which this is true. While rumours about a beautiful but dangerous woman make for good storytelling, there is no evidence to prove any criminal behaviour by Lucrezia.

Even what Lucrezia looked like is debated! While the painting in Source 7 on the top is a popular one, only the one on the bottom is a confirmed portrait of her (when she was the Duchess of Ferrara).

For more information on this key concept, refer to page 201 of 'The history toolkit'.

Source 7 To this day, people continue to debate about Lucrezia's appearance.

KEY CONCEPT
Evidence

Worksheet
Sources on women

18.5 CHECK YOUR LEARNING

Review and understand

1 **Describe** how the lives of upper-class women were different from the lives of middle- and lower-class women in Renaissance Italy.

2 **Identify** three ways in which the education of boys and girls was different.

Apply and analyse

3 Historians have commented that women did not experience the same renaissance that men did. Use evidence from this topic to **explain** whether you agree or disagree with this statement.

4 **Determine** (decide) why the job of midwife was seen as an important one. Give two reasons to support your answer.

5 Portraits were often commissioned to present a symbolic image of a person – portraying certain character traits through the pose, facial expression, background scenery, clothing and items being held. **Compare** the two portraits of Lucrezia Borgia in Source 7. What impression does each portrait create, and how do they do this?

Evaluate and create

6 Research the life of Lucrezia Borgia. **Create** a biography of her life, including her achievements.

7 As a class, **discuss** the perspectives held towards women in Renaissance Italy. There are additional sources on your obook pro to help get this discussion started.

18.6 Society in Renaissance Florence

In this topic, you will:

- explore the influence of government in the Republic of Florence
- analyse the relationships between members of society and authority in the Republic of Florence.

Florence was one of the most prosperous and successful city-states in Renaissance Italy.

Commerce

It was a centre of commerce, where merchants traded woollen cloth, jewellery and metalwork for luxury goods from Asia, including spices, dyes, silks, pearls and precious metals.

All Florentine goods were crafted to a very high standard. This is in part because of the **guilds**, which were associations for the different types of merchants, artists and craftspeople. Their role was to educate apprentices, and make sure that goods and services were of a high standard and quality.

As merchants became more prosperous, they began to lend money to other traders, shipowners and business people. This led to Florence becoming the financial centre of Europe in the fifteenth century. The currency of Florence was the gold florin.

Source 8 The front and back of a thirteenth-century gold florin

guilds
groups of people all working in the same trade (e.g. butchers, tailors, cobblers) who band together in support of their common interests

patrons
people who devote some of their wealth, time and interest to developing the skills of others (usually in the arts)

Culture

Florence was also the cultural centre of Renaissance Italy with a very literate society. It was full of civic and religious rituals that unified the people. Budding artists, sculptors, writers and philosophers flocked to the city. There, they sought wealthy nobles to become their **patrons**. Famous artists such as Leonardo da Vinci and Michelangelo were based in Florence. Elaborate palazzos, grand cathedrals and public buildings sprung up around the city, funded by wealthy patrons.

Patriotism

The people of Florence were very patriotic, which means they loved their unique city-state. In fact, many suffered from 'Florentinitis', an obsession with all things Florentine! After completing a pilgrimage to the Holy Land, Florentine goldsmith Marco Rustichi wrote: 'On returning to my native city of Florence … after having seen and known many provinces and cities that are all over the world, I feel as if I had returned to paradise.'

Source 9 A view of modern-day Florence; the majority of buildings date from the Renaissance period. The skyline is dominated by the Florence Cathedral (*Duomo di Firenze*), designed by Brunelleschi, and the Palazzo Vecchio, which housed the *signoria*.

How power was distributed

Political power in Florence was held by wealthy wool merchants and bankers. Even though the city-state was a republic, several families dominated political life and influenced important decisions. These families included the Medici, the Strozzi and the Pazzi. Over the years, there were tensions and conflicts among these families (see page 396).

The political structure

The governing body of Florence was known as the *signoria*. It had nine members, called the *priori*, who were each elected for terms of two months. To be elected as *priori*, there were strict conditions. A person had to be:

- male and over 30 years of age
- part of the *popolo grasso* social class
- a member of a craft guild
- not in debt
- not related to other members of current *signoria*.

Out of all the men who met these conditions, a secretary called an *accoppiatori* would select a small percentage and place their names into a leather bag. The first eight names drawn out were chosen as *priori*. The ninth member was elected as the leader – or *gonfalonerie* – of the *signoria*. This position usually went to a member of a powerful family, often one of the Medici.

There were two other councils made up of bankers, merchants and landowners, and in times of war or famine, extra councils could be elected.

Although it seemed to be a democratic system, most of the population was excluded from the *signoria*. As one of the requirements to be elected was to be a member of the *popolo grasso* social class, the government was controlled by the richest merchant families. The *popolo minuto* and the *grandi* could not vote.

Interactive
Guilds of Renaissance Florence

Explore it!
A virtual field trip to the Palazzo Vecchio

The statue of David

Michelangelo's statue of David is one of the most significant works of art from the Renaissance period.

Taking on the project at the age of 26, Michelangelo spent two years sculpting the 5-metre-tall masterpiece out of one piece of marble. He used innovative techniques that had never been attempted before.

The statue of David was originally meant to stand on the roof of Florence Cathedral; however, the *signoria* and a committee of notable artists agreed it was too perfect to be placed so high. They voted for its location to be at the political heart of Florence, the Palazzo Vecchio.

It took four days to move the 5660-kilogram statue to the palazzo, and 40 men to slide it on wooden beams up some steps. Italian painter Giorgio Vasari captured its perfection, stating: 'This work has surpassed all other statues … no other artwork is equal to it in any respect, with such just proportion, beauty and excellence did Michelangelo finish it.'

For more information on this key concept, refer to page 201 of 'The history toolkit'.

KEY CONCEPT
Significance

Source 10 The entrance to the Palazzo Vecchio now has a copy of the statue of David, which was placed there in 1910.

Source 11 A painting of the Medici Villa of Poggio a Caiano in Tuscany by Giusto Utens; the villa was commissioned by Lorenzo de Medici in 1485.

The Medici family

The Medici family were bankers and merchants who had great influence in Florence during the Renaissance. At times, the Medici were considered the wealthiest family in Europe. Starting in 1434, they wielded power over the *signoria* for almost 300 years.

The Medici rose to power around the time of Giovanni de Medici (1360–1429). In 1397, he began the Medici Bank, which became the largest bank in Europe. His son Cosimo continued the family's rise to power by becoming the *gran maestro* (leader) of Florence.

Taking control of Florence

The Medici were devoted patrons of the arts. Cosimo funded the construction of many buildings such as libraries, churches and academies and oversaw the Treaty of Lodi in 1454.

This is also how the Medici spread their influence. By helping others financially, they formed many connections throughout the city. Using the art of persuasion (and pressure) on their neighbours, relatives, friends and even friends of friends, they had remarkable access to members of Florentine society.

Key skill worksheet
Determining historical significance: The Medici family

exiled
expelled from one's place of birth, usually for political reasons

Family connections

The Medici formed alliances with other prosperous families through marriage. For example, Catherine Medici became Queen of France in 1549 after marrying a French prince. All three of her sons became kings. As their mother, she was one of the most powerful people in Europe during the sixteenth century. The Medici also wielded power within the Catholic Church, with four members of the family becoming Popes.

Source 12 The Medici family commissioned *Adoration of the Magi* by Botticelli (1476) to show them as part of the nativity scene, making them appear as holy figures, with Cosimo de Medici almost touching the feet of Christ. It was a symbolic way for the Medici to promote their power.

Enemies

The Medici had many enemies, including the Pazzis. In 1478, members of the Pazzi family tried to kill Lorenzo and Guiliano de Medici. The Pazzi, together with the Archbishop of Pisa and the Pope, wanted to see the Medici removed from power in Florence.

Guiliano was killed, but Lorenzo survived. The Medici and their loyal supporters crushed the Pazzi family. They were banished from Florence and their wealth was confiscated.

The decline of the Medici family

In the late fifteenth century, the Medici were **exiled** from Florence after signing an unfavourable treaty with France. However, they still had influence in the region until the eighteenth century.

Significant individual: Lorenzo de Medici

Lorenzo de Medici (sometimes called Lorenzo the Magnificent) was the grandson of Cosimo de Medici. He ruled Florence though the peak of the Renaissance, from 1469 until his death in 1492. He is often regarded as the most brilliant of the Medici, and was seen as a generous leader while maintaining all power over Florence.

Lorenzo loved to embrace the festivities of Florence. He supported many artists, including Michelangelo and Leonardo da Vinci. He was a well-liked statesman, a skilled businessman and a talented poet. His interests covered all areas of Renaissance thinking, including philosophy, classic literature and science. As such, he was considered a 'Renaissance man'. This label captured the idea that the ideal man can do all things – physically, socially, politically and culturally.

Source 13 A portrait of Lorenzo de Medici by Agnolo de Cosimo, *c.* fifteenth century

Source 14

In peaceful times [Lorenzo] often entertained the people with various festivities, such as jousts, feats of arms, and representations of triumphs of olden times. He aimed to maintain abundance in the city, to keep the people united and the nobility honoured. He had the greatest love and admiration for all who excelled in any art, and was a great patron of learning and of literary men … Lorenzo took the greatest delight in architecture, music and poetry; and many of his own poetic compositions, enriched with commentaries, appeared in print. And for the purpose of enabling the Florentine youths to devote themselves to the study of letters, he established a university in the city of Pisa.

Extract from *History of Florence and of the Affairs of Italy*, written in 1521 by Niccoló Machiavelli, a famous writer of the Renaissance era; this book was dedicated to Pope Clement VII.

18.6 CHECK YOUR LEARNING

Review and understand

1 **Identify** the main sources of Florence's wealth.

2 **List** two famous artists who worked in Florence.

3 Why did people suffer from 'Florentinitis'?

Apply and analyse

4 A new *signoria* was elected every two months.
- a How do you think this might have impacted the stability of Florence?
- b Use a flowchart to **explain** the process involved when electing a new member of the *signoria*.
- c **Summarise** how the Medici family gained political control of the *signoria*.

5 Using the 5Rs, **analyse** the significance of the statue of David. See page 212 of 'The history toolkit' to help you get started.

6 **Examine** Source 14.
- a **Analyse** the source. Use the 'DAMMIT U' acronym (see page 216 of 'The history toolkit') to structure your response.
- b **Describe** the atmosphere created under the leadership of Lorenzo de Medici in Florence.
- c Based on what you have read, what do you believe was Lorenzo de Medici's greatest achievement or development?

Evaluate and create

7 Research one member of the Medici family and write a 200-word biography that explains who they were and when they lived. **Evaluate** the impact they had on Florence, the Renaissance and/or their family.

18B RICH TASK

Renaissance society

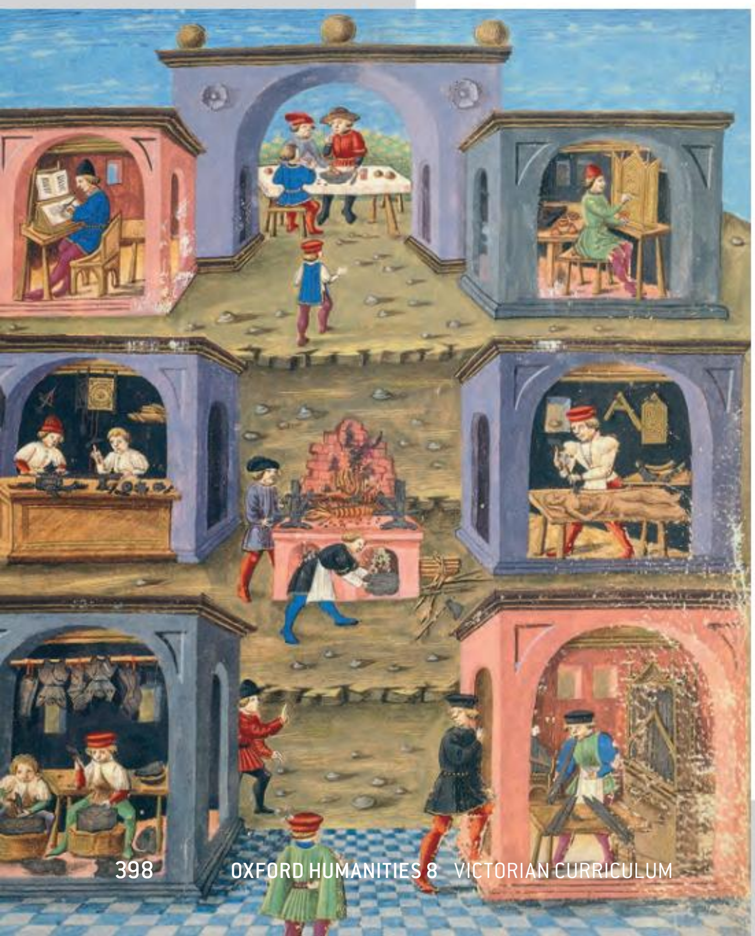
Quizlet
Revise the key terms you have learnt so far.

Age, gender, wealth, geography, education and experiences all had an effect on the way people lived in Renaissance Italy.

There are many primary sources from the Renaissance period, both written and visual. These sources have helped historians to develop a rich understanding of Italian society during the Renaissance. However, they must be examined carefully.

Source 16 *Care of the Sick* by Domenico di Bartolo; this fresco (wall painting) in the Santa Maria della Scala Museum, Siena dates from the early fifteenth century. It shows wealthy and well-dressed men visiting and tending the sick.

Source 15 *The Professions*, an illustration from a manuscript, *c.* 1470; it shows (clockwise from top left) a scribe, a painter, a sculptor, an organ maker, an armourer and a clockmaker. In the centre are a cook and a man serving food.



Source 17

By what mortals was this outstanding city founded? Recognize, men of Florence, recognize your race and your forbears. Consider that you are, of all races, the most renowned. For other people have as forbears refugees or those banished from their fathers' homes … But your founder is the Roman people – the lord and conqueror of the entire world. Immortal God you have conferred so many good things on this one city, so that everything … seems to rebound to Florence's benefit.

Extract from Leonardo Bruni,
Panegyric to the City of Florence, 1402

KEY SKILL
Analysing sources

Analysing primary sources

Primary sources are records produced during the period being studied. They may be written documents, such as letters, or visual sources, including paintings and buildings. The primary sources that historians use to understand Renaissance life tell a range of stories. It is the job of historians to examine these sources and come to conclusions about their usefulness and reliability.

It is important to identify, if possible, who created each source and the reason why it was created. For example, a struggling artist may write in glowing terms about a local nobleman. In reality, the nobleman might be a ruthless tyrant; but the struggling artist, hoping for patronage, may ignore the negative aspects of his character.

Step 1 **Evaluating reliability:** To determine the reliability of a source, you need to identify whether it is biased. Being biased means having an unbalanced or one-sided opinion. To recognise bias in a source, ask yourself the following questions:

- Who created the source and when?
- Why was the source created?
- Is there a possibility of bias?
- What message does the source convey?
- What is included and what is excluded?
- What can the source tell me about life at the time that it was created?

Step 2 **Evaluating usefulness:** To evaluate the usefulness of a source you should ask the following questions:

- What question am I investigating?
- Is the source reliable?
- What messages is the source conveying – both explicit and implicit?
- What is the source saying or showing that will assist me to answer my historical question?
- What additional information would I like that would help me to answer my question?

For more information on this key skill, refer to page 213 of 'The history toolkit'.

Practise the skill

1 Examine Sources 15 to 17 and **identify** the key ideas that each is conveying. How are these ideas conveyed?

2 Which source seems to you to be the most reliable? **Explain** why you think this.

3 Which source do you believe would have had the greatest impact at the time? **Explain** why you think this.

4 Whose voices have *not* been heard in this collection of sources? **Explain** why you think this is.

5 Using the internet or the library, locate another written and visual source that reflect additional aspects of life in Renaissance Italy. **Explain** how they add to your understanding of life in this period.

Extend your understanding

Choose one of the Italian city-states not dealt with by these sources; for example, the Papal States, Venice, Milan or Naples.

1 Select three primary sources that will help to give an impression of life in the city-state you have chosen.

2 For each source, **identify** one feature that helps you to understand an aspect of the city-state (for example, an image of St Peter's Basilica indicates the importance of Rome as the centre of the Catholic Church).

3 Of the sources that you have chosen, **explain** which you believe to be the most reliable and why. Support your answer with reference to the source itself, and who produced it, when, and for what audience.

18.7 Humanism

In this topic, you will:

- investigate the change in thinking during the Renaissance
- examine the influence of classical philosophy from ancient Greece and Rome.

humanism
a group of philosophies centred on the importance of human beings, values and evidence, rather than religion, gods and supernatural matters

New and creative approaches to philosophy, art, architecture, literature and science flourished during the Renaissance. A strong influence on this new creativity came from the revival of ancient Greek and Roman ideas.

One of the most significant influences on Renaissance culture was **humanism**. From the early years of Christianity, most writing and art was based on religion. Science was almost non-existent. Anything that could not be explained was regarded as the work of God.

As the Renaissance developed, there was an increasing emphasis on the role of human beings in the shaping of the world. Humanism emphasised the value of human abilities and achievements, particularly the ability to use reason and logic. Renaissance humanists still believed in God. However, they no longer accepted that the Church was all-powerful.

Key humanist thinkers

Key humanist thinkers analysed the behaviours and motivations of humans based on their observations.

Francesco Petrarch

Source 1 Francesco Petrarch was a leading humanist scholar.

Francesco Petrarch (1304–74) was a poet and scholar who had considerable influence on the development of the Renaissance in Italy. He believed that the rediscovery of ancient Greek and Roman ideas was going to provide a light to help people emerge from the 'Dark Age' of medieval society.

Baldassare Castiglione

Baldassare Castiglione (1478–1529) wrote *The Book of the Courtier* in 1528. It described the behaviour of the ideal courtier (who is most often a noble person who attends a royal court). The talents of the ideal courtier included knowledge, artistic talents and practical skills. He could speak well, sing, recite poetry, talk about classical literature, and paint. He was also an excellent sportsman, and aware of how to behave socially.

In *The Book of the Courtier*, Castiglione condemned people's ruder social habits, such as spitting on the floor, eating without utensils and wiping one's nose on a sleeve. According to him, the ideal courtier was confident, but modest, detached and calm. He was an excellent example of a 'Renaissance man'.

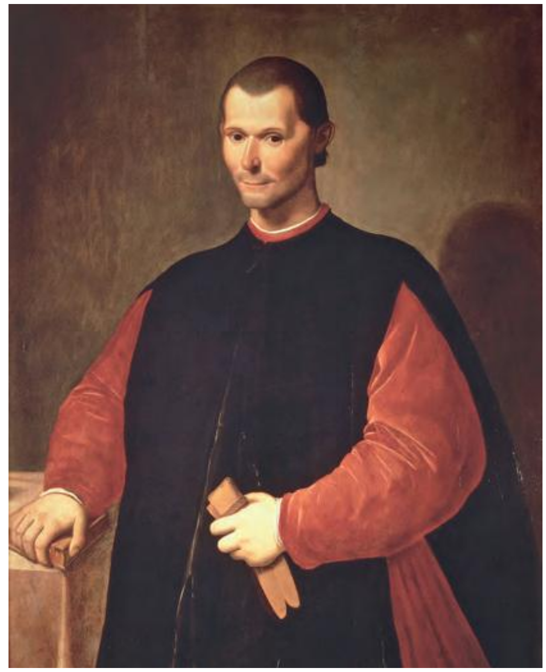
Source 2 A portrait of Baldassare Castiglione by Raphael

Niccoló Machiavelli

Niccoló Machiavelli (1469–1527) was a politician and writer in Florence. In 1513, he wrote *The Prince* – an instruction manual for men wanting to become rulers or leaders.

Machiavelli based his writings on the Medici family and other rulers of the time. The central message of *The Prince* was that a ruler needed to use deceit, cruelty and even murder his opponents to make sure he could keep his position of power. Machiavelli argued that if people feared their ruler, they were more likely to respect them. He recommended that a ruler use any means necessary to achieve what was good for his community.

Since the publication of *The Prince*, there has been disagreement as to Machiavelli's purpose. Many leaders have followed his message. This has led to the term 'Machiavellian' being used to describe cunning and manipulative people. Others have suggested that Machiavelli actually believed the exact opposite of the advice he gave – that he was trying to expose the oppressive and ruthless ways of many of the Renaissance rulers.



Source 3 Niccoló Machiavelli

Analyse this!
The Prince

Source 4 An extract from *The Prince*

> Everyone realises how praiseworthy it is for a prince to honour his word and to be straightforward rather than crafty in his dealings; [but] experience shows that princes who have achieved great things have been those who have given their word lightly, who have known how to trick men with their cunning, and who, in the end, have overcome those abiding by honest principles.
>
> Niccoló Machiavelli, *The Prince*, George Bull (trans.), Penguin Books, 1961, pp. 100–1.

18.7 CHECK YOUR LEARNING

Review and understand

1 **Identify** the key beliefs of humanism.

2 **Outline** Petrarch's beliefs about the revival of the Greek and Roman ideas.

Apply and analyse

3 Why do you think the emergence of humanist thinking may have led to a questioning of faith in the Church? **Explain** your answer.

Evaluate and create

4 Imagine that you are a novelist and you want to **create** a Renaissance courtier as one of your characters. Using the information about the ideal courtier in this topic:
- write a description of your courtier who fulfils all the qualities identified by Castiglione
- give your courtier a name
- describe his appearance (research 'dress of a Renaissance courtier')
- discuss his role in society.

5 Consider the two explanations for Machiavelli's views. Using the extract from *The Prince* (Source 4), state which explanation you support. **Justify** (give reasons for) your response.

6 In pairs, **discuss** the term 'Machiavellian'. Do you think it would be good if a leader was described in this way? Why or why not?

18.8 Renaissance art

In this topic, you will:

- discover how changes during the Renaissance period were represented in art
- explore the significance of art to the expansion of wealth and power during Renaissance Italy.

One of the features of the Renaissance was the beginning of new styles of painting, sculpture and architecture. During the Italian Renaissance, artists tried new approaches in terms of techniques, materials and subject matter. Many Renaissance artists already had expertise in painting, sculpture and architecture. This meant that developments in one area influenced the others.

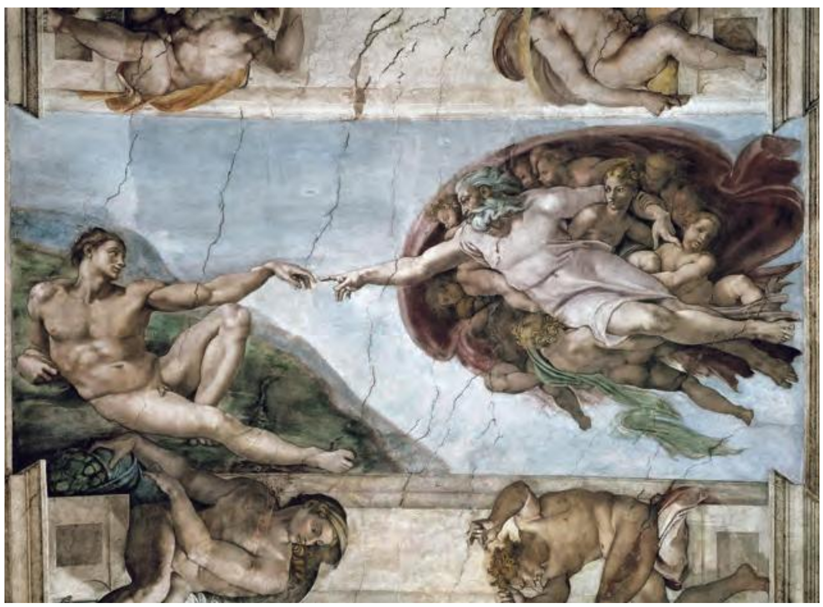
The changing role of the artist

Before the Renaissance, many artists and sculptors in Europe were little more than stonemasons, plasterers or craftspeople. They performed tasks such as painting furniture or making jewellery. Medieval art was mainly for religious purposes and was found in cathedrals, churches, monasteries and convents. But as wealth increased through trade, successful people became patrons of the arts. They gave money to artists so they could paint or sculpt artwork for them – a process called **commissioning**.

commissioning ordering and paying for the creation of a work of art, building, etc.

Many works of art were grand and imposing, demanding great skill and talent. Artists earned public respect and admiration. They began to sign their work and to create self-portraits. Often artists would include images of their patrons in paintings and sculptures, even in religious works (see, for example, Source 12 on page 396). The more confident artists also included themselves in the paintings they created.

Source 5 The dome of Florence Cathedral (*Duomo di Firenze*) was designed by Filippo Brunelleschi and completed in 1436. It is still an important landmark in Florence.



Source 6 *The Creation of Adam* – detail from Michelangelo's painting on the ceiling of the Sistine Chapel in the Vatican

The leading painters and sculptors of Renaissance Italy established workshops. In these workshops, paintings or monuments were crafted, materials were made and stored, and apprentices were trained. Often, a master painter would complete the most important parts of a work and let his students finish less important features.

New approaches to art

During the Renaissance, religious art continued to be popular, but works on different subjects also began to appear. Artistic styles and techniques were also influenced by the classical works of the ancient Greeks and Romans.

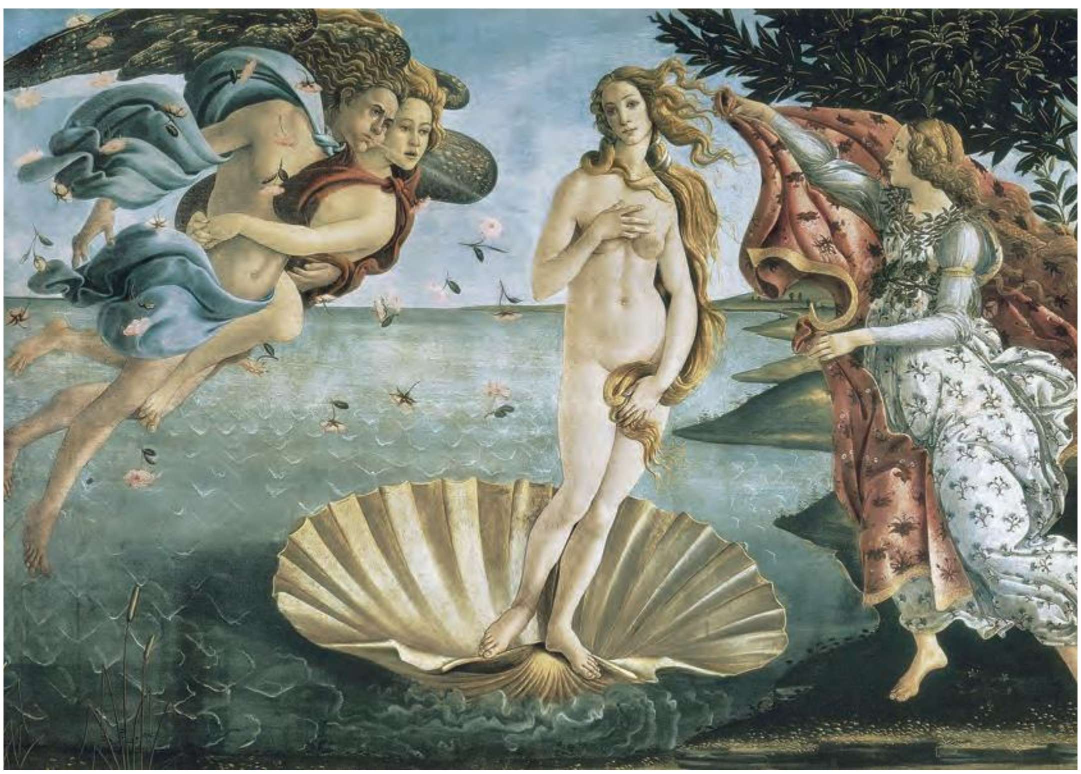
Source 7 Characteristics of Renaissance art

Realism	Focused on portraying the human figure in its most realistic and accurate form to show emotion, gesture and thought
Perspective	Created a 3D appearance, with parallel lines moving towards a focal point in the horizon to create depth
Secularism	Preferred to depict daily life and emotions in portraits, with less focus on Biblical or church settings
Classicism	Were influenced by Roman and Greek classics, including lifelike art and representations of pagan beliefs, especially nature worship
Humanism	Placed humans at the centre of the universe; individuals were often depicted, rather than groups or crowds
Depth	Used light and shadow to create depth, as well as a blue background, often sky
Symmetry	Focused on balance and proportion, particularly in the representation of human anatomy
Naturalism	Preferred to depict real objects, settings and landscapes with as little distortion as possible

pagan
a term sometimes used by people of Christian, Muslim and Jewish faiths to describe those who do not share their beliefs

One feature of Renaissance art was realism – an attempt to represent the human body as accurately as possible. Renaissance sculptors studied the human body (often dissecting corpses) in order to show bone structure, muscles and sinews accurately. They also believed in depicting the body unclothed or semi-naked. Sandro Botticelli was the first Renaissance artist to paint a full-length female nude (see Source 8).

Analyse this!
Birth of Venus



Source 8 Botticelli's *Birth of Venus*

perspective
a new approach to painting developed during the Renaissance, which involved making objects larger in the foreground and smaller in the background to suggest distance

Renaissance artists also used new techniques to show people and other objects in **perspective**. This meant they could paint things to look near to or far from the viewer, even if they were on the same canvas. The scenes that they painted looked realistic in terms of size and proportion. They also depicted the landscapes that existed around them, rather than the biblical settings of medieval paintings.

Source 9 Leonardo da Vinci's *The Last Supper* displays the elements of Renaissance painting – a religious theme, perspective and a view of the landscape in the background.

Analyse this!
The Last Supper

The importance of patrons

Patrons played a very significant role in artists' lives. Wealthy merchants and bankers commissioned monuments or works of art to beautify and glorify their towns and cities, and to enhance their reputations. They also often gave an artist or sculptor a place to live, and the necessary money, time and encouragement to travel, study and explore.

Powerful families, such as the Medici family, had their grand palazzos and country villas decorated with art. They also commissioned works of art to celebrate important occasions in family life, such as weddings, births and deaths.

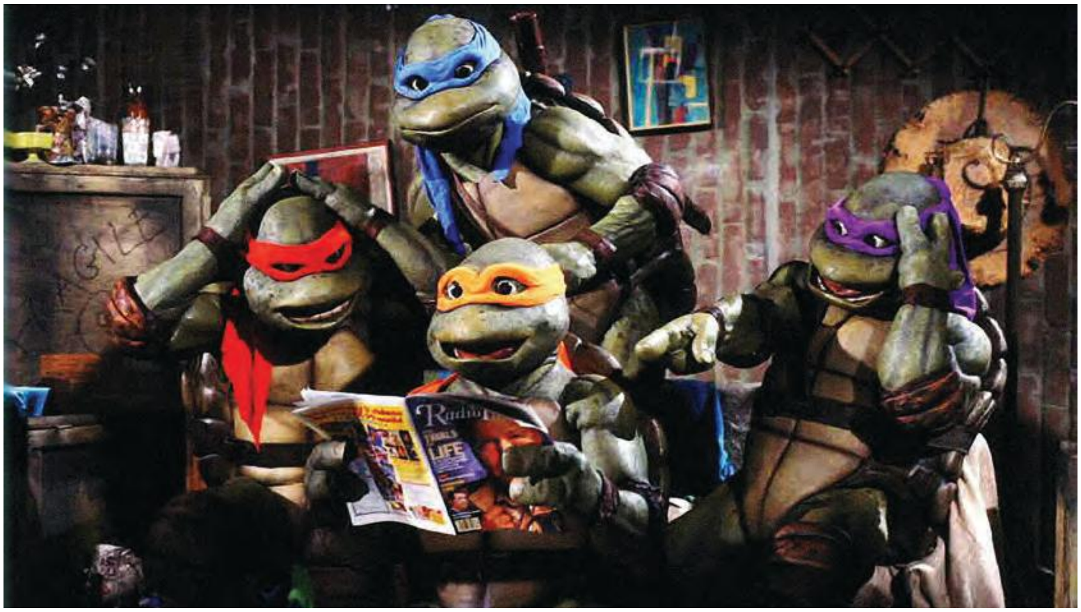
A painter would often flatter his patron by including the patron's family crest or even an image of his whole family in the work that had been commissioned.

Guilds and government bodies also commissioned artists to create works of art to beautify government buildings or rooms. For example, the statue of David by Michelangelo (see page 395) was commissioned by the city of Florence in 1501.

The Church as a patron

The Roman Catholic Church was by far the greatest patron of the arts in Renaissance Italy. The Church funded the building of cathedrals and churches, and commissioned statues and paintings for their interiors. Popes commissioned decorations for their homes, their own portraits, and even sculptures for their own elaborate tombs.

Michelangelo's most famous Church commission was the ceiling of the Sistine Chapel in the Vatican (see Source 6), painted between 1508 and 1512 for Pope Julius II. He also created the *Pieta* – a statue of Mary holding Jesus after he had been taken down from the cross. This statue, carved from a single block of Carrera marble, is regarded as one of the most beautiful and sensitive pieces of Renaissance art (see Source 11).



Source 10 The Teenage Mutant Ninja Turtles were named after four of the most famed Renaissance artists – Raphael, Leonardo, Michelangelo and Donatello.

18.8 CHECK YOUR LEARNING

Review and understand

1 What sorts of people acted as patrons of the arts in Renaissance Italy?

2 **Describe** the ways artists would sometimes flatter their wealthy patrons.

3 **Outline** three ways in which art in the Renaissance was different from earlier art.

Apply and analyse

4 Examine Michelangelo's *Pieta* in Source 11 – one of the most loved and admired pieces of Renaissance art. **Suggest** reasons why this statue is so revered (admired).

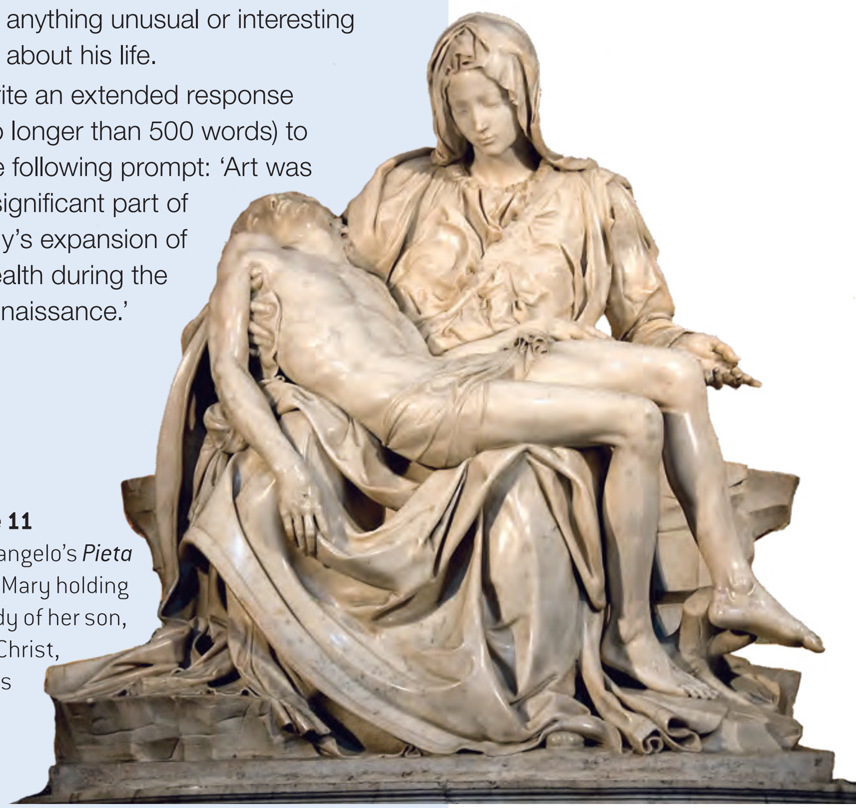
5 **Examine** the photo of the Florence Cathedral (*Duomo di Firenze*) in Source 5. What do you notice about the cathedral in relation to the surrounding buildings? What can you learn from this about attitudes and values in Renaissance Florence?

Evaluate and create

6 Imagine that you were a close friend of Leonardo da Vinci and you have been asked to deliver a eulogy (a writing or speech that is a tribute to someone who has died) at his funeral. Conduct some research and **create** a eulogy that covers:

- the main dates and details of his life
- his artistic career, patron, artistic style, famous artworks, etc.
- anything unusual or interesting about his life.

7 Write an extended response (no longer than 500 words) to the following prompt: 'Art was a significant part of Italy's expansion of wealth during the Renaissance.'



Source 11 Michelangelo's *Pieta* shows Mary holding the body of her son, Jesus Christ, after his death.

*** I used to think, now I think**

Reflect on your learning about the influence of art from Renaissance Italy and complete the following sentences.

- I used to think …
- Now I think …

What has changed in your understanding?

18.9 Renaissance science and technology

In this topic, you will:

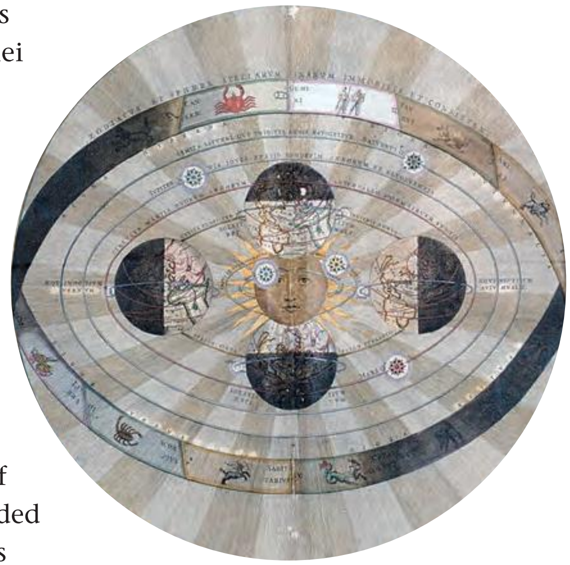
- explore how Renaissance developments in science and technology challenged the power of the Church.

Quiz me!
A quick quiz on Renaissance science and technology

During the Renaissance, many advances were made in science. Renaissance scholars were influenced by the humanist idea that people could make their own discoveries. They applied ancient Greek and Roman methods of reasoning to explain the natural world. This led to new theories, which conflicted with ideas promoted by the Church.

Key scientific thinkers

The work of four men in particular had a lasting effect on science and medicine. They were Nicolas Copernicus, Andreas Vesalius, Galileo Galilei and Leonardo da Vinci.



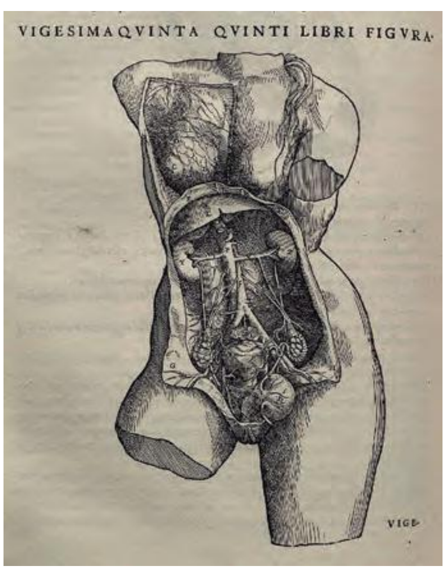
Source 12 A Copernican view of the solar system, showing the Earth and other planets revolving around the sun

Nicolas Copernicus

Nicolas Copernicus (1473–1543) was a Polish astronomer who studied the movement of stars and planets. He developed the theory that the sun was the centre of the universe, with the Earth, moon and planets revolving around it. Copernicus clashed with Church leaders who believed that the Earth was the centre of the universe. Any other suggestion was regarded as **heresy**. Because of the controversy over his theories, Copernicus delayed the publication of his book *On the Revolutions of the Celestial Spheres* until a few hours before he died, in 1543.

heresy
doing or saying something regarded by the medieval Catholic Church (and by some other faiths) as being in serious conflict with its teachings

Source 13 An anatomical diagram of a man's abdominal cavity, with the intestines removed to illustrate the organs; from Vesalius' *On the Fabric of the Human Body*



Andreas Vesalius

Andreas Vesalius (1514–64) is regarded as the founder of modern human anatomy – the study of the human body. He wanted to experiment on human corpses, but the Church did not approve. However, with the help of a local judge, he was able to obtain the corpses of criminals who had been executed. In 1543, Vesalius published a book on the structure of the human body that changed the course of anatomical studies: *On the Fabric of the Human Body.*

Galileo Galilei

Galileo Galilei (1564–1642) was born in Pisa. In 1608, the first practical telescope had been invented in Holland. Galileo worked to improve the magnifying power of the telescope, and two years later he was able to observe the Moon and planets.

Galileo discovered stars and four satellites of Jupiter, which he named after members of the Medici family. In return, Cosimo de Medici II appointed Galileo as professor of philosophy and mathematics in 1610.

Galileo's discoveries proved that Copernicus' theory about the Earth and the sun was correct. Like Copernicus, Galileo was accused of heresy. He was convicted in 1633 and placed under house arrest for the rest of his life. Still, he continued to work on problems of physics and mechanics. His controversial book *Two New Sciences*, which was put on the Church's 'List of Forbidden Books', was published in Holland in 1638.

Galileo's legacy is remarkable. His achievements in astronomy changed the way we understand the universe. He also helped to free the study of science from the restrictions of religion. This was a major development in human thought.

Leonardo da Vinci

Leonardo da Vinci (1452–1519) was the classic 'Renaissance man'. He was an accomplished painter and sculptor, a scientist, an engineer and an inventor. As a successful artist, he was given permission to dissect corpses in hospitals. This enabled him to study the human form and make detailed drawings of bones, muscles and internal organs. Leonardo was also fascinated by flight. He studied the flight of birds and tried to invent a machine called an 'air screw' that would enable humans to fly (see Source 15).

Source 14 Galileo standing trial before the Church for his beliefs, which went against the teachings of the Church

Source 15 A drawing of an 'air screw' in one of Leonardo's notebooks

18.9 CHECK YOUR LEARNING

Review and understand

1 **Identify** four significant scientific figures of the Renaissance period.

Apply and analyse

2 What do you see as the most significant scientific discovery of the Renaissance period? **Explain** your answer.

3 **Summarise** why new scientific experiments and theories led scientists into conflict with the Church. Give a specific example of when new ideas conflicted with the Church's teachings.

Evaluate and create

4 Examine Source 14. **Create** a thought bubble for each of the four characters in the painting.

5 You are on a panel that is to award the title 'Most significant Renaissance scientist'. The names on the short list are Copernicus, Vesalius, Galileo and Leonardo. Choose a scientist, conduct some research and create a biography on them. Include their main achievements and **justify** (give reasons for) why your scientist should receive the award.

18.10 The Northern Renaissance and the Reformation

In this topic, you will:

» understand the cause and effect of the Reformation in Europe.

Reformation
a movement that began in Europe in the sixteenth century when the scholar-monk Martin Luther publicly challenged the Catholic Church; it shifted the balance of power in Europe away from the Church

Key skill worksheet
Analysing cause & effect: The Reformation

By the sixteenth century, many of the themes, ideas and techniques of Renaissance culture had spread north into Germany, Austria, France and Holland. This became known as the Northern Renaissance.

More people began to question the authority and extreme wealth of the Catholic Church. Countries of Northern and Western Europe had never been as strongly tied to the Church as the Italians. Increasingly, they challenged the institution, and this ultimately led to a movement known as the **Reformation**.

Corruption in the Church

In the centuries leading up to the Renaissance, many people had become aware of the corruption in the Church. Renaissance Popes, in particular, are often referred to as 'Princes of the Church'. This is because they led lives of luxury and spent a great deal of money on grand monuments and palaces. Some Popes gave family members high positions as archbishops and cardinals.

THE EFFECT OF THE REFORMATION ON RELIGIOUS BELIEF IN EUROPE

Note: This map shows the modern-day borders of some countries

Source 16 Source: Oxford University Press

Challengers to the Church

A great number of Christians believed that Church leaders were failing to live according to their own teachings. Many people – including some members of the Church – demanded reform.

Desiderius Erasmus

One of the most influential reformers was the Dutch priest Desiderius Erasmus (1466–1536). His essay *The Praise of Folly* made fun of the way many Church people behaved. It became a bestseller because it played on people's anger about corruption in the Church. Still, Erasmus did not suggest that the basic teachings of the Church were wrong – only that its leaders needed to change their behaviour.

Martin Luther

Martin Luther (1483–1546) was a German monk and professor of theology (religious study) who also wanted to reform the Church. He criticised Church officials who used their positions to make themselves wealthy. Like Erasmus, Luther believed a person's faith in God was the key to salvation.

Luther launched an attack on the Church in 1517, following a scandal in relation to what he described as 'the selling of **indulgences**'. The Church taught that most people did not go straight to heaven, even if they had led good lives. They first had to spend some time in **purgatory**. However, time in purgatory could be shortened or even wiped away if a person earned an indulgence. Indulgences were initially earned through prayer and good works but, during the Renaissance, they could be bought in return for donations to the Church.

Source 17 Martin Luther posting his *Ninety-five Theses*, painted by Julius Hübner, *c.* nineteenth century

Unlike Erasmus, who wanted to work *with* the Church on reform, Luther called for a break from the Church. In 1517, he nailed a list of objections to the Catholic Church – called the *Ninety-five Theses* – to the door of a church in Wittenberg, Germany (see Source 17). Pope Leo X ordered him to withdraw the list but he refused. Luther went on to break from the Church of Rome and establish the Lutheran Church.

Other members of the Catholic Church gradually broke away from Rome and established new Christian religions. The people who supported these religions became known as Protestants, because their churches were founded on 'protest' against the established Church.

indulgences
ways that Catholics could shorten their time in purgatory and gain quicker entry to heaven

purgatory
a place where Catholics believed their souls had to suffer for a time, before they were cleansed and pure enough to enter heaven

18.10 CHECK YOUR LEARNING

Review and understand

1 **Identify** three examples of corrupt practices that caused people to become disappointed with the Church.

Apply and analyse

2 **Distinguish between** the attitudes of Luther and Erasmus to corruption in the church. Remember, when you distinguish between two things you need to explain how they are different.

3 **Analyse** Source 17 by answering these questions:
   a What does the painting show?
   b **Examine** the faces and attitudes of the people watching Luther. What attitude do you think they have towards Luther's actions? What features of the painting create this impression?

4 **Examine** Source 16.
   a **List** which modern countries became largely Lutheran countries following the Reformation.
   b Do you think this map helps us understand the concept of cause and effect? Why or why not?

Evaluate and create

5 In pairs, conduct further research on why indulgences became controversial during the Reformation. **Create** a dialogue between Martin Luther and Pope Leo X on the sale of indulgences. Each speaker should put forward two arguments to explain their view on the issue.

18.11 The culture of the Northern Renaissance

In this topic, you will:

- explain how the cultural developments of the Renaissance spread throughout the rest of Europe.

Many of the great works of art from Northern Europe by those who came after the Italian Renaissance show its influence. Rembrandt (1606–69), Rubens (1577–1640) and Albrecht Durer (1471–1528) were among the many who followed Italian techniques. They used ideas from the painters and sculptors of the Italian Renaissance, such as perspective and the realistic depiction of the human body.

However, there were differences. Much of the art and architecture of the Renaissance in Italy was funded by the Church. As the challenge to the Roman Catholic Church grew in northern Europe, art became more separated from religion.

The French King Francis I (1494–1547) encouraged many artists, including Leonardo da Vinci, to move to France. The influence of Renaissance Italy on France can be seen mainly through architecture. The magnificent Chateau de Fontainebleau (see Source 18), outside Paris, and the Louvre Museum are fine examples of the use of Italian Renaissance ideas in France.

Source 18 The design of the Chateau de Fontainebleau in France was influenced by the Italian Renaissance.

The English Renaissance

By the early sixteenth century, Renaissance ideas had spread to England, where they became very popular. The most significant advances there could be seen in poetry, music and drama.

King Henry VIII

King Henry VIII (1491–1547) was a true ‘Renaissance prince’. Well educated in the humanities, he also excelled at sport, wrote poetry, and composed and played music.

Henry clashed with the Roman Catholic Church when he wanted to divorce his first wife, Catherine of Aragon, to marry Anne Boleyn. As this was against the teachings of the Church at the time, Henry left the Roman Catholic Church, and made himself head of the ‘Church of England’. However, there was little change in the way that religion was practised.

Queen Elizabeth I

Henry’s daughter, Elizabeth I, who became queen in 1558, was tutored by a Renaissance scholar. Her successful reign was known as the English Renaissance, as it was a time of great stability and economic development. It was during the reign of Elizabeth that the Church of England was properly established as a separate religion.

Key skill worksheet
Asking questions & conducting research: The English Renaissance

Elizabeth was a strong supporter of the arts, and many members of the aristocracy acted as patrons for artists, musicians, dramatists and poets. One of the most significant patrons of the time was Robert Dudley, Earl of Leicester.

William Shakespeare

The most famous dramatist of the period was William Shakespeare. Shakespeare wrote up to 38 plays and numerous poems. He often wrote about English and Scottish history, and explored themes such as love, revenge, politics and family dysfunction.

A number of Shakespeare's plays were set in Italy, such as *Romeo and Juliet*, *The Merchant of Venice* and *Much Ado About Nothing*. They reflected the influence of the Italian Renaissance. By choosing Italy as a setting, Shakespeare was also able to express himself politically, without fear of censorship or imprisonment. His plays drew huge audiences at the Globe Theatre in London. A replica of the original Globe opened in London in 1997, and Shakespeare's plays are performed there regularly.

Source 19 Henry VIII, a true 'Renaissance prince', painted by Hans Holbein, 1540

Source 20 Queen Elizabeth I had a very distinctive and elaborate fashion sense, which aimed to communicate the confidence, wealth and status of England.

Source 21 William Shakespeare's plays were often set in Renaissance Italy.

18.11 CHECK YOUR LEARNING

Review and understand

1 **Identify** how Renaissance Italy influenced France and England.

Apply and analyse

2 **Explain** how the writings and actions of people such as Martin Luther and Desiderius Erasmus may have paved the way for Henry VIII's break with the Roman Catholic Church.

3 Using Sources 19 to 21, **analyse** how these portraits convey the strength of England. Look at the facial expressions, stance, objects being held and what the subjects are wearing.

Evaluate and create

4 Henry VIII has been described as a 'Renaissance prince'. Conduct some further research into the term and into Henry's life and achievements. In groups, **discuss** whether he deserves that title, considering the different evidence you have found.

5 **Research** one of Shakespeare's plays that is set in Renaissance Italy. Using your research, discuss how certain Renaissance values (for example, humanism) are present in the play.

18C RICH TASK

Quizlet
Revise the key terms you have learnt so far.

The evolving Renaissance

Historians often recognise the Renaissance as one of the most significant periods of change in human history. This change is further classified into three stages, based on when various cultural developments and humanist thinking were reached.

Source 22 Time periods of the Renaissance

The time period	The main features
The Early Renaissance (1400 to 1490)	• Cultural developments occurred mostly in Florence, sponsored by the Medici family. • Artists focused on humanism, naturalism and perspective in their works. • Musical works became more lively and shorter.
The High Renaissance (1490–1527)	• Cultural developments reached their peak. • Artists including Leonardo da Vinci, Raphael and Michelangelo created new artworks in Rome for the Pope. • A new understanding of science, anatomy and architecture developed.
The Late Renaissance (1520–1600)	• Cultural developments included literature from Machiavelli and Shakespeare. • A scientific revolution began, with works produced by Copernicus, Vesalius and Galileo. • Reformation gained support during this time as people questioned the practices of the Catholic Church.

Source 23 Construction of St Peter's Basilica in the Vatican started in 1506, during the High Renaissance. Michelangelo was the chief architect. Look at its enormous columns when compared to the size of the visitors!

The spirit of change, inventiveness and discovery that the Renaissance created inspired a new era known as the Age of Exploration. From the fifteenth century, Europeans began to expand their horizons – in particular, Prince Henry the Navigator, Christopher Columbus and Ferdinand Magellan. Developments in shipbuilding and navigation meant that longer journeys of discovery were now possible.

Source 24 *Orpheus Playing Among the Animals*, by Jacopo da Sellaio *c.* 1480, captures naturalism and a return to classic pagan beliefs in the Early Renaissance.

KEY SKILL
Sequencing events

Plotting events on a timeline

Timelines are a very important tool for historians. They allow the reader to quickly identify what happened when, and how much time went by between events.

Follow these steps when creating a timeline:

Step 1 Determine the type of timeline required; that is, horizontal or vertical.

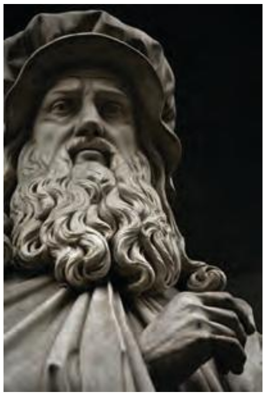
Step 2 Establish the total time span you need to cover with your timeline. Consider:

- the starting date of the timeline
- the end date of the timeline.

Step 3 Enter the most significant dates on the timeline, and provide key facts and information about the events that took place on each date. Be sure your written text is clear and concise.

Step 4 Make sure each event date is entered chronologically (in order) from left to right (for horizontal timelines) or top to bottom (for vertical timelines).

For more information on this key skill, refer to page 206 of 'The history toolkit'.



Source 25 A statue of Leonardo da Vinci

Practise the skill

1 Follow the steps provided to **create** a timeline of the three periods of the Renaissance (see Source 22). Represent each period using different coloured bars above the timeline and label them accordingly.

2 Add significant dates to your timeline for achievements such as artworks, books, policies and buildings. Be sure to provide a short description for each date. The table in Source 26 may help you to cover a wide array of people.

Source 26 Significant Renaissance men and women

Artists	Sculptors/architects	Writers/ philosophers
Leonardo da Vinci Raphael Sandro Botticelli	Michelangelo Donatello Filippo Brunelleschi	Niccoló Machiavelli Francesco Petrarch Desiderius Erasmus William Shakespeare Martin Luther
Scientists	**Bankers**	**Women**
Galileo Galilei Nicolas Copernicus Andreas Vesalius	Cosimo de Medici Lorenzo de Medici	Isabelle D'Este Catherine de Medici Lucrezia Borgia

3 Add a few relevant images to your timeline and give it a suitable title.

4 **Describe** the distribution of dates in regards to the three periods. In which period of the Renaissance are the most achievements? Why?

Extend your understanding

1 **Research** one individual who made a significant contribution during the Renaissance era and create a pamphlet about them, including:

- the 5Ws and H of history (who, what, when, where, why and how)
- their significance at the time and their legacy today
- your decision as to whether they were a true 'Renaissance man' or 'Renaissance woman'.

2 In the classroom, hold a special gathering for Renaissance men and women. Perhaps imagine you are at a party being held by the Medici family for the patrons and artists of Florence. As you meet and greet with other Renaissance men and women, share a few copies of your pamphlet and enjoy conversation about Renaissance topics, such as humanism, the Reformation, the city-states and the arts from the perspective of your character.

18 CHAPTER REVIEW

Review questions

18A Why did the Renaissance develop?

1. **Outline** the characteristics of one city-state. (2 marks)
2. **Explain** the cause and effect of trade on the development of the city-states. (3 marks)
3. **Summarise** the various factors that led to the development of the Renaissance. Rank these factors from most important through to least important. (5 marks)

(Total: 10 marks)

18B How was society organised during the Renaissance in Italy?

1. **Describe** the daily life of the *popolo grasso* and *popolo minuto*. (4 marks)
2. Which do you think would have brought a family more power and status: marriage or becoming a patron? **Justify** (give reasons for) your answer. (6 marks)

(Total: 10 marks)

18C What were the greatest achievements of the Renaissance and how did they influence the rest of Europe?

1. **Identify** how Machiavelli believed people should feel about their rulers. (1 mark)
2. **Explain** the impact of humanism on art during the Renaissance. (3 marks)
3. **Discuss** how the concept of cause and effect can be applied to explain why people started questioning the Catholic Church during the Renaissance. (6 marks)

(Total: 10 marks)

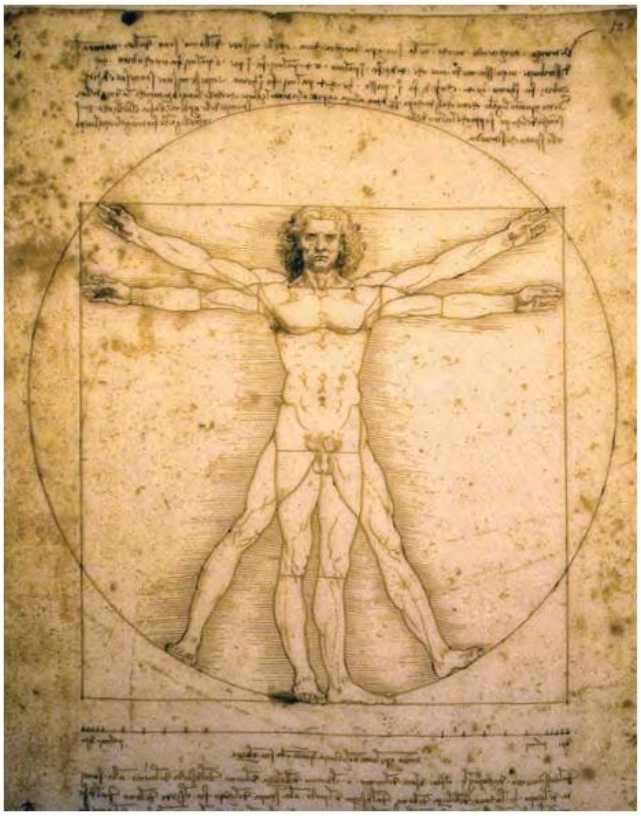
Review activity

Examine the sources and answer the questions that follow.

Humanism

Source 27

> Man who provides generally for all things, both living and lifeless, is a kind of god. Certainly he is the god of the animals, for he makes use of them all, rules them all, and instructs many of them. It is also obvious that he is the god of the elements for he inhabits and cultivates all of them.
>
> Finally, he is the god of all materials for he handles, changes and shapes all of them. He who governs the body in so many and so important ways, and is the vicar of the immortal God, he is no doubt immortal.
>
> Extract from Marsilio Ficino, *The Soul of Man*, *c.* 1474



Source 28 *Vitruvian Man* by Leonardo da Vinci, *c.* 1485

1 **Explain** how Leonardo da Vinci's work in Source 28 demonstrates that he was a 'Renaissance man'. (3 marks)

2 In Source 27, **explain** what is meant by the phrase 'god of all materials'. Provide an example based on your understanding of Renaissance society. (3 marks)

3 **Describe** the overall message and tone used in Source 27. (2 marks)

4 **Outline** the characteristics of Renaissance art that you can see in Source 28. (2 marks)

5 Which change during the Renaissance had the greatest impact on society:

- the challenges placed on the Church by science and humanism, or
- the cultural developments that inspired human progress.

Evaluate both of these points to decide which one you think had the greatest impact. Remember to talk about the strengths and weaknesses in each point. Use Sources 27 and 28 to support your response. (10 marks)

(Total: 20 marks)

Check your Student obook pro for these digital resources and more:

Student book questions
Chapter 18

Key skill worksheet
Communicating & reflecting: Chapter 18

Quizlet
Play a game of Quizlet on Renaissance Italy.

Chapter review quiz
Chapter 18

CHAPTER 19

The Spanish conquest of the Americas

Towards the end of the fifteenth century, a period of exploration began in Europe. Driven by a desire for wealth, power and territories, countries such as Spain sent explorers known as conquistadors (conquerors) in search of new lands and trade routes.

In 1492, navigator and explorer Christopher Columbus – an Italian hired by the Spanish royal family – found the islands now known as the Bahamas. This marked the beginning the Spanish conquest of the Americas.

When the Spanish arrived, there were two dominant empires in the Americas: the Aztec Empire and the Inca Empire. The Spanish saw these indigenous peoples as primitive, godless 'savages'; they enslaved them, and devastated their cultures.

Source 1 An artist's impression of the capital city of the Aztec Empire, Tenochtitlan, before the arrival of the Spanish in 1519; at this time, Tenochtitlan was home to around 200 000 people. By 1521, two years after Spanish arrival, the Aztec Empire had collapsed and Tenochtitlan had been destroyed.

19A

How were societies organised in the Americas before the arrival of the Spanish?

19B

Why did the Spanish colonise the Americas? How were they able to do so?

19C

What were the effects of Spanish conquest in the Americas and around the world?

19.1 The Spanish conquest of the Americas: a timeline

Sequence this!
Key events during the Spanish conquest of the Americas

1420 CE — 1490 — 1500 — 1510

1428
A triple alliance is forged between the cities of Tenochtitlan, Texcoco and Tlacopan. This cements the power of the Aztec Empire.

1492
Christopher Columbus arrives in the Americas, landing in the Bahamas, Cuba and Hispaniola in the Caribbean.

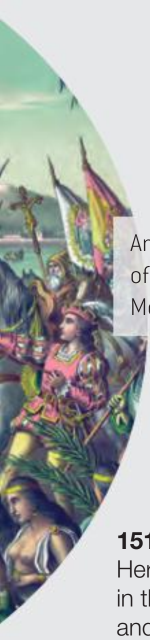
1494
The Treaty of Tordesillas is signed. In it, Pope Alexander VI grants all lands to the west of a line drawn through the Atlantic Ocean to Spain, and all lands to the east of the line to Portugal.

1502
Montezuma becomes the Aztec ruler.

1507
'America' is first named by the cartographer Martin Waldseemüller, in honour of the explorer Amerigo Vespucci.

Source 1 A timeline of some key events during the Spanish conquest of the Americas

An artist's impression of the arrival of Columbus in the Americas



An artist's impression of Cortés meeting Montezuma

The siege of Tenochtitlan

1517
Hernandez de Cordaba begins to explore the Yucatan Peninsula and Mexico's east coast.

1519
Hernán Cortés arrives in the Aztec Empire and enters the capital city, Tenochtitlan.

1520
Aztecs in Tecnochtitlan are massacred by the Spanish, and Montezuma dies. The Spanish are driven out of the city a few months later. A smallpox epidemic sweeps through the region in the same year, killing thousands.

1521
The Aztecs are defeated and Tenochtitlan is destroyed after a three-month siege by the Spanish and their allies.

1530
Francisco Pizarro makes contact with the Inca Empire.

1532
Pizarro returns with a small force and captures the Inca ruler. The Inca capital of Cuzco falls to the Spanish in the following year.

1572
The last Inca Empire is defeated by the Spanish, ending all resistance to Spanish colonisation in South America.

1520 | 1530 | 1570 | 1580 CE

19.1 CHECK YOUR LEARNING

Review and understand

1 **Identify** the Aztec leader ruling when Hernán Cortés entered the Aztec Empire.

2 **List** the names of the Spanish and other Europeans mentioned in the timeline and identify the key events in which they were involved.

3 **Describe** what the abbreviation 'CE' stands for. Why it is used? (See page 206 of 'The history toolkit'.)

4 **Describe** the purpose of the two zig-zag lines used on the timeline. (See page 207 of 'The history toolkit'.)

Apply and analyse

5 Use the timeline to **calculate** the length of the period between:

a the arrival of Cortés in the Aztec Empire and the capture of its capital, Tenochtitlan

b the arrival of Pizarro in the Inca Empire and the capture of its capital, Cuzco.

Evaluate and create

6 Select an individual from the timeline. Conduct some **research** and write a paragraph that explains their significance in the Spanish conquest of the Americas.

19.2 The major civilisations of the Maya, Inca and Aztec

In this topic, you will:

- » explain how human occupation of the Americas occurred
- » explore the key features of the three major civilisations.

'Out of Africa'
one model in the theory of how modern humans spread around the world; it hypothesises that modern humans developed in Africa before migrating outwards

ice age
a cooler period in the Earth's history when ice covered much of the northern hemisphere and sea levels were much lower than they are today

Quiz me!
A quick quiz on the major civilisations of the Maya, Inca and Aztec

According to the **'Out of Africa'** hypothesis, modern humans evolved in Africa and first left the continent around 200 000 years ago to find new hunting areas. They settled in the Middle East, followed by areas in Europe and Asia, as these locations were the closest.

Eventually, humans arrived in the Americas (see Source 2) after migrating from the Eurasian land mass eastwards, sometime between 40 000 and 15 000 years ago, during the last great **ice age**. They journeyed on a land bridge between Asia and North America that existed when sea levels were lower than they are in the present day. Some people moved eastwards and settled across the northern parts of North America. Others moved further south, into the most southern regions of North America and into Central America and South America. The three main civilisations in this region were the Maya, the Inca and the Aztec (see Source 3). Only two of these civilisations remained by the fifteenth century. These were the Aztec (in the region that is now Mexico) and the Inca (in the region that is now Peru).

THE AMERICAS

Source 2 Source: Oxford University Press

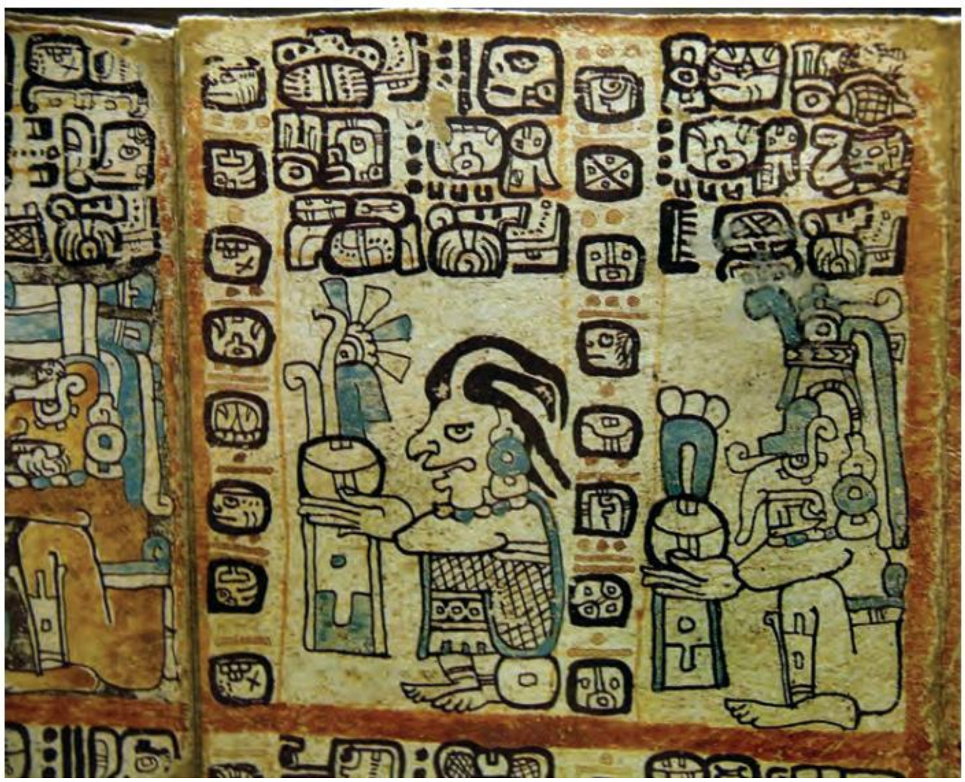
AZTEC, MAYA AND INCA CIVILISATIONS

Source 3 Source: Oxford University Press

Source 4 The ruins known as Mundo Perdido (which is Spanish for 'Lost World') in the ancient Mayan city of Tikal (in modern-day Guatemala)

The Maya

The Maya civilisation was the oldest of the three. It was at the height of its power between 250 and 900 CE, when the Maya ruled a large area of southern modern-day Mexico and northern Central America, centred around the Yucatán Peninsula. The Mayan people did not have one sole leader or capital city. Each of their cities had its own ruler, who governed independently. The Maya were skilled in arithmetic and astronomy, and had their own form of hieroglyphic writing, known as glyphs.



Source 5 An example of Mayan glyphs from the *Madrid Codex*, dating between about 900 and 1521 CE (from the Museo de América, Madrid); a codex is a bound ancient manuscript, similar to a book.

The Inca

The Inca were originally one of many tribes in the Andes Mountains of South America, in modern-day Peru. They conquered other tribes, and by 1493 CE the Inca Empire had become the most powerful in the Americas, with the city of Cuzco as its capital. Their territories extended for 4000 kilometres on the western coast of South America (see Source 3), including parts of modern-day Chile, Ecuador, Peru and Bolivia. To govern their empire, the Inca developed an efficient administrative system, an extensive network of roads, and strategically built stone fortresses. They excelled in working metals, such as silver, copper and gold.

The Inca built intricate cities and temples. One of the most famous examples of this is Machu Picchu, perched high on the top of a mountain (see Source 7).

Source 6 An example of an Inca *tumi* – an ornate ceremonial tool, with a distinctive curved blade, which could be used for sacrifices

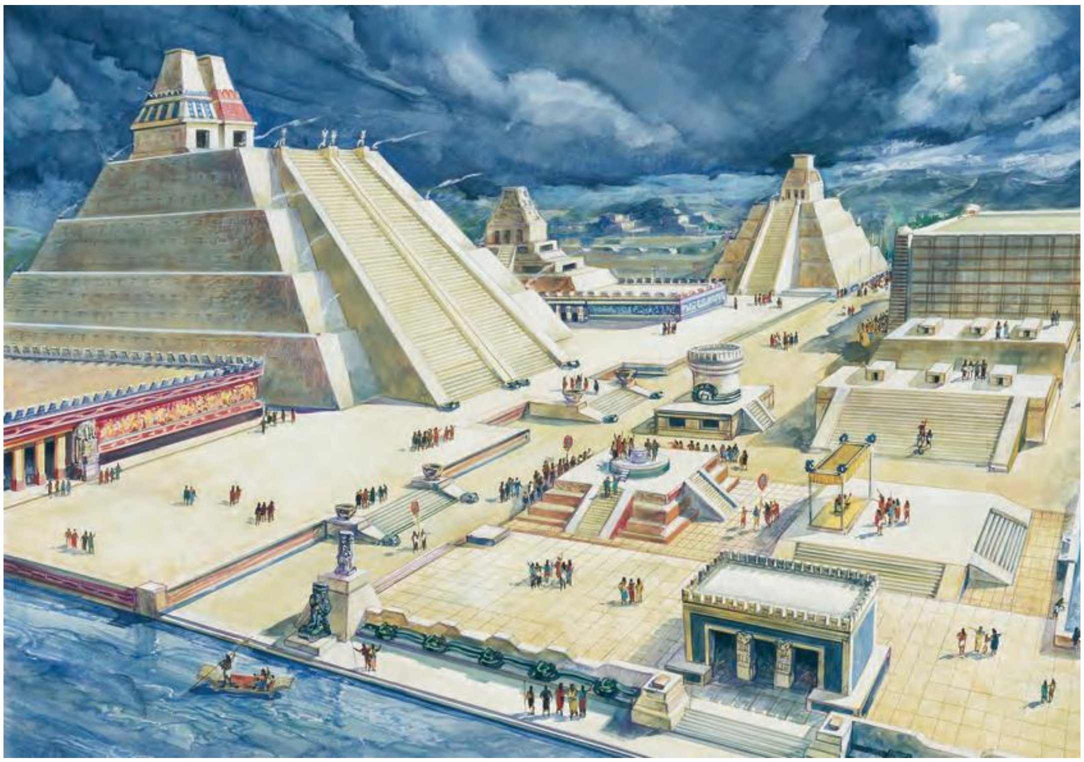
Explore it!
A virtual field trip to Machu Picchu

Source 7 The restored remains of Machu Picchu

The Aztecs

The Aztecs were a group that originated in the north of modern-day Mexico. Note that the word 'Aztec' can refer to the civilisation itself, the people, or just the ruling classes. The Aztecs were self-sufficient and highly skilled. By conquering rival tribes, they created an empire that stretched between the Pacific Ocean and the Gulf of Mexico (see Source 3). When the Spanish **conquistador** Hernán Cortés arrived in 1519, there were around 489 **city-states** in the Aztec Empire, ruled by the powerful ruler Montezuma II (also known as Moctezuma). The centre of Aztec civilisation was the capital Tenochtitlan, a city built on swampy islands in the middle of Lake Texcoco.

Source 8 The Aztec 'calendar stone', also known as the 'sun stone', was discovered in Mexico City in 1790. This massive circular monolith, with the Aztec sun god at its centre, dates from the early sixteenth century. Its hieroglyphics relate the mythology of the Aztec world.



Source 9 A modern artist's impression of the city of Tenochtitlan

conquistador
(pronounced con-kees-ta-dor) a Spanish word for a soldier or conqueror

city-states
independent settlements made up of an inner fortified city surrounded by houses; this built centre was surrounded by farmland that supported (e.g. with food) the urban centre

19.2 CHECK YOUR LEARNING

Review and understand

1 **Identify** the modern-day countries where the Maya, Inca and Aztec civilisations were located. (Hint: Refer to the map at the back of this textbook to help.)

2 **Describe** the journey that humans took to occupy the Americas.

Apply and analyse

3 **Distinguish between** the ways the Maya and Aztec civilisations were governed. Remember, when you distinguish between two things, you need to talk about how they are different.

4 **Explain** why the land bridge connecting Europe and North America no longer exists today.

5 **Examine** Source 7 and think about what type of skills would have been required to build the city of Machu Picchu. List these skills based on your observation, and explain how you came up with each one.

Evaluate and create

6 **Research** the geographical features of one of the three civilisations discussed in this topic. How did the environment influence daily life in this civilisation?

19.3 Key groups in Aztec society

In this topic, you will:

- distinguish between different social classes in Aztec society
- develop an understanding of the role of women and children in Aztec society.

Source 10 The Aztec emperor Montezuma

Aztec society was organised according to a strict **hierarchy**, and each person had a particular place and role to fulfil. There were five major social classes – the emperor, nobles, warriors, commoners and slaves – and there was little opportunity to move out of the class into which you were born. Older people were highly respected in Aztec society.

hierarchy
a social structure that organises people with the most important group on top and others ranked beneath in decreasing order of importance

emperor
someone who rules an empire; an empire is a group of countries or areas often speaking different languages and having different cultures, but centrally ruled

absolute ruler
an individual who governs with supreme authority, unrestricted by laws

tributes
something given as a mark of respect to someone important

Emperor

At the top of the hierarchy was the **emperor**. The emperor was an **absolute ruler**, who was selected as leader by a council of nobles. He was regarded by the people as a god, and was called the 'Great Speaker'. The emperor lived in a highly decorated palace and enjoyed a luxurious lifestyle. He ruled with the help of his noble officials, counsellors, judges and military leaders.

Source 11 An example of the long, feather headdress worn by an Aztec noble

Nobles

The nobility included high-level priests, military leaders, landowners, judges and heads of government. These ruling groups were privileged, and lived well compared to the ordinary people. Nobles could receive **tributes** from commoners.

Noble status was passed down from parents to children. Nobles lived on their own estates, and were the only class other than the emperor allowed to wear decorated capes and jewellery. The wealthy and those who were heroes of war dressed elaborately, with intricate headdresses (often made of feathers), necklaces, earrings and bangles made of gold, silver, copper and precious stones. Their body art included ornaments worn in holes in the ears and in split bottom lips. The nobility would show their wealth and dominance through extravagant feasts and expensive gifts to each other.

Warriors

Warriors were highly respected in Aztec society. Most males in Tenochtitlan were trained to be warriors, and left their families at puberty to go and live in the local warrior house. Women could not be warriors.

Warriors were expected to be very brave, and were taught that it was an honour to die in battle. There was a formal hierarchy within the warrior group based on how many live captives (who were later sacrificed to the gods) a warrior had taken in battle. Successful warriors could expect to receive gifts and riches, but for most it was a part-time profession. The majority of warriors had to practise another trade to support themselves.

Analyse this!
Aztec warriors

Source 12 A sixteenth-century illustration of Aztec warriors from the *Codex Mendoza*; the warriors carry wooden weapons and shields made from feathers, agave paper (made from a type of succulent), leather and reed.

Commoners

All commoners were grouped into **clans**. Members of each clan owned and farmed their land, and they were responsible for maintaining their local temples and schools, which every child attended. Commoners included farmers, craftspeople, merchants and low-level priests. They were expected to pay tribute to the nobles who owned the ***calpulli*** (neighbourhoods) that they lived in.

Commoners usually ate basic foods, including domestic animals such as turkeys, dogs and guinea pigs, and lived in simple homes. They were not allowed to wear cotton, wear cloaks longer than the knee, or wear sandals in the presence of people of higher rank. Commoners could sometimes become nobles through marriage or in recognition of their bravery in war.

clans
groups of people linked and united in their aims and behaviours by the knowledge (or a belief) that they share common ancestors

calpulli
in Aztec society, a neighbourhood within a city-state

Source 13 An illustration from the sixteenth-century *Florentine Codex* (see page 19.20) showing an Aztec commoner threshing amaranth grain (a food used by Aztecs in their religious ceremonies)

Slaves

Slaves were owned by nobles or wealthy merchants, and had few rights. Typically, people became slaves if they were criminals, could not pay their debts or had been captured in war. Slaves could marry with their master's permission and could also buy their freedom. Slave status was not passed down to children; the children of slaves were born free.

The role of men and women in Aztec society

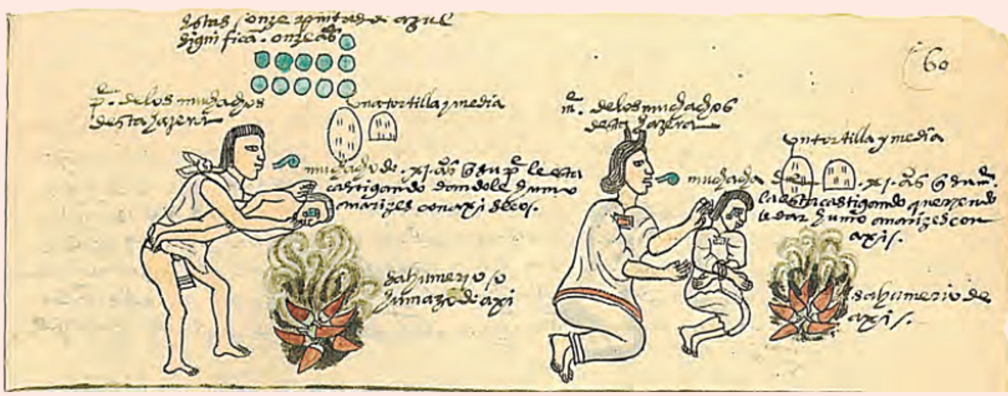
An Aztec family was made up of a man, his chief wife, his other wives, his children and other relatives such as his parents. Marriages were arranged with help from priests, who would consult the stars to check for suitable matches. Girls married at around 16 years of age and men at around 20. Both boys and girls went to school, although they were destined for very different lives. Women were expected to care for children, cook and weave cloth. They helped to tend home gardens and any other plots of land the family was given to work. They had almost no public role. Men, on the other hand, were expected to become warriors and seek glory by taking enemy captives.

KEY CONCEPT
Evidence

Aztec discipline of children

When looking at pieces of primary evidence, historians use empathy to recognise how people in the past felt. By using empathy, historians can develop an understanding of how certain issues, events or relationships impacted people.

For Aztec children, discipline was very strict, both at home and at school. Punishments included being speared with the sharp spines of a cactus, being left bound and naked in the dark in a cold puddle, or being bound and held over a fire to inhale smoke from burning chillies (see Source 14).



Source 14 Illustrations from the sixteenth-century *Codex Mendoza* (see page 19.20) give details of the Aztec discipline of children. Here, a boy is being forced to inhale dried chilli smoke for disobeying his parents.

Girls were awakened in the middle of the night to sweep the house, and had their fingers cut if they made a mistake in tasks, such as weaving. Historians suggest that the Spanish may have exaggerated these stories, but evidence tells us that discipline was definitely physical.

By applying empathy to the Aztecs' form of discipline, we can develop an understanding of how children were punished, and how this might have felt.

For more information on this key concept, refer to page 201 of 'The history toolkit'.

Source 15 More illustrations from the *Codex Mendoza* show that typical jobs for children in the Aztec Empire included fishing and weaving. Children also ground maize (corn) to make tortillas (bread).

19.3 CHECK YOUR LEARNING

Review and understand

1 **Identify** the groups of people who helped the emperor rule.

2 **Describe** the roles and responsibilities of the warrior class.

3 How did people become slaves?

Apply and analyse

4 **Distinguish between** a noble and a commoner. Remember, when you distinguish between two things, you should talk about how they are different.

5 Look closely at Source 14.

a **Describe** what the source is showing. Refer to specific parts of the source and use evidence to support your answer.

b **Explain** if this is a primary or secondary source. Use evidence to give reasons for your response.

c How reliable do you think this source is? Use evidence to **explain** your answer.

Evaluate and create

6 a Imagine that you are an Aztec child from a family of commoners. **Create** a diary entry about your daily life and the discipline you face. You could include information about housing, food, clothing, reasons for discipline and types of discipline.

b How does your diary entry use empathy to help imagine what life was like for the Aztecs?

19.4 Religious beliefs in Aztec society

In this topic, you will:

- » explore the polytheistic beliefs of the Aztecs
- » analyse the historical significance of human sacrifice.

polytheistic
relating to the belief in or worship of more than one god

Religion was a central part of Aztec society and dominated almost every aspect of daily life. The Aztecs were **polytheistic**, and worshipped many gods who they believed were responsible for things such as the sun, war, rain, crops, harvests, fire and the dead (see Source 16). Aztec gods were demanding, and had to be calmed through bloody offerings.

Source 16 The gods who were most important to the Aztecs

Huitzilopochtli	God of the sun and of war
Tlaloc	God of rain, agricultural fertility and water
Xipe Totec	God of springtime and new crops
Quetzalcoatl	God of nature, earth and air
Tezcatlipoca	God of the night sky; giver and taker of all life on Earth
Mictlantecuhtli	God of the dead
Xiuhtecuhtli	God of fire

Source 17 A drawing of the god Quetzalcoatl, the 'feathered serpent god', from the *Codex Borbonicus*

The Aztecs believed that their gods gave them life. For example, they believed that Huitzilopochtli battled with the forces of darkness every night so that the sun would come up the next morning. If ever he grew weak, the sun would not rise and the universe would come to an end, so people had to provide nourishment for him in the form of blood sacrifice. The Aztecs welcomed Tlaloc as a god who gave life and sustenance, but also feared him for his ability to send hail, thunder and lightning.

The Aztecs built temples to worship their gods. They were steep pyramid-shaped structures, with lots of steps to reach the top. The Aztecs believed the process of ascending the stairs was part of preparing oneself to please the gods.

Life after death

The Aztecs believed in life after death. They believed that the way someone died, rather than the way they lived, determined what would happen to them in the afterlife. If a person died a normal death, his or her soul would pass through the nine levels of the underworld before reaching Mictlan, the realm of the death god Mictlantecuhtli. However, warriors who died in battle and women who died in childbirth joined Huitzilopochtli. The dead were buried with goods of all descriptions for use in the afterlife.

Source 18 An Aztec *chacmool*

Analyse this!
An Aztec *chacmool*

Human sacrifices

Human sacrifices were performed in honour of the gods of the sun, rain and earth. The most common form of sacrifice among the Aztecs involved stretching the victim over a sacrificial stone. Four priests held the limbs of the victim, while another priest cut open the chest and took out the heart. The heart was placed in a ***chacmool*** (see Source 18) and the victim was then thrown down the steep temple steps. The body was picked up and part of it, such as the thigh, was given as a reward to the victim's captor to eat. Those who were sacrificed were considered to be fortunate, since they were guaranteed a place in the highest heaven reserved for warriors who died in battle.

Mass sacrifices

Sacrificial ceremonies could involve just one victim or many thousands at once. For example, when the Temple of Huitzilopochtli was completed in Tenochtitlan, up to 20000 people were sacrificed. The victims were prisoners from a group called the Huastecs, from the north-eastern part of what is now Mexico. In 1487, they had tried to revolt against the Aztec Empire but had been unsuccessful. As punishment, the Aztec warriors marched

chacmool
in Aztec society, a sculpture of a reclining human figure with a tray on its lap, used to hold sacrificial offerings

Source 19 A knife used by Aztec priests for human sacrifices

Source 20 An illustration of a ritual killing from the *Codex Magliabechiano*, showing victims being sacrificed on the steps of a temple

them back to Tenochtitlan, roped together by cords which ran through a hole in their nose or around their neck.

As they arrived, they were greeted by priests who informed them that they had the privilege of dying as offerings at the Great Temple, or *Templo Mayor*. There were four lines of prisoners that stretched the full length of the streets leading up to the temple. The victims were men, women and children, who cried and wailed as they walked to their deaths. They climbed, stumbled or were dragged up the steps of the pyramid.

When they reached the top, they were sacrificed by the priests. One body after another – after the heart was cut out – rolled down the steep steps of the pyramid. The priests became drenched in blood, and eventually the blood ran in rivers down the steps.

Source 21 This image shows the Road of Death leading to the Pyramid of the Moon, Teotihuacan (in modern-day Mexico). Life in the Americas before colonisation was so advanced that, by the time of the Aztecs, this ancient city was already abandoned and in ruins.

The 5Rs of historical significance

History is full of so many important events, people and discoveries that we could never study them all. Instead, we need to make a judgment about which ones are worthy of study. To do this, we must analyse how significant they are.

The 5Rs (see Source 22) are an easy way for us to remember what to look for when analysing the historical significance of aspects of the past. They stand for remarkable, resulted in change, revealing, resonates and remembered. The table in Source 22 contains some guiding questions that we can use when distinguishing between each of the 5Rs.

For more information on this key skill, refer to page 212 of 'The history toolkit'.

Practise the skill

1 Using what you have learnt about the importance of human sacrifice in Aztec religious beliefs, **analyse** the historical significance of this practice by working through each of the 5Rs (as outlined in Source 22).

Source 22

5Rs of significance	Guiding questions
Remarkable	What was the most notable thing about the event/ individual/group of people?
Resulted in change	What happened as an immediate result of the event or the actions of the individual/group of people (i.e. what were the short-term impacts)?
Revealing	What does the event/ individual/group of people tell us about the time period?
Resonates	How has the event/ individual/group of people had an effect on future generations (i.e. what were the long-term impacts)?
Remembered	How is the event/ individual/group of people remembered today? What evidence still exists?

KEY SKILL
Determining historical significance

19.4 CHECK YOUR LEARNING

Review and understand

1 In your own words, **define** 'polytheism'.

2 **Identify** what the Aztecs believed would happen if sacrifices were not made to Huitzilopochtli.

3 Why was the way Aztecs died important?

4 **Describe** the purpose of a *chacmool*.

Apply and analyse

5 **Summarise** the relationship that the Aztecs had with their gods. Why do you think they felt the way they did?

Evaluate and create

6 **Create** a diary entry reflecting on the sacrifice of the Huastec people, from the perspective of either a priest or one of the Aztec nobles watching the ritual.

7 The historical concept of cause and effect relates to why something happened, and what positive and negatives effects it created. In pairs, **discuss** the cause and effect of human sacrifice on:

a the Aztecs

b the Huastecs and other civilisations.

19.5 Life in Tenochtitlan

In this topic, you will:

- describe the location of Tenochtitlan and why the Aztecs settled there
- explain the key features of Tenochtitlan and the influence that it had on the daily lives of the Aztecs.

Quiz me!
A quick quiz on life in Tenochtitlan

Tenochtitlan was the capital of the Aztec Empire. It was founded around 1325 CE in the Valley of Mexico, now the site of modern-day Mexico City.

By 1519, Tenochtitlan was home to 200 000 inhabitants on an island of about 8 square kilometres. This was at a time when Spain's largest city, Seville, had a population of 70 000. Source 23 is an account from the Spanish conquistador Hernán Cortés. It shows us his first impressions of Tenochtitlan on his arrival that year.

Source 23

When we saw all those cities and villages built in the water … we were astounded … These great towns and pyramids and buildings rising from the water, all made of stone, seemed like an enchanted vision.

Extract from a letter from Hernán Cortés, describing his arrival in Tenochtitlan

The shape of the city

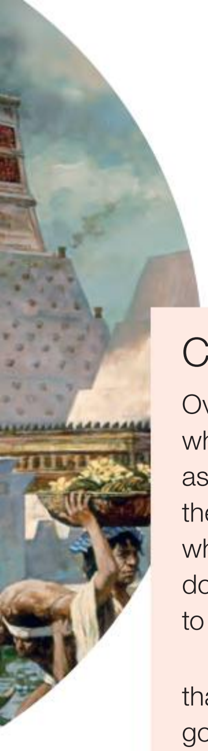
As the power of the Aztec Empire grew, the entire urban area of Tenochtitlan was carefully rebuilt in the fifteenth century. It was laid out on a grid pattern, with 'roads' running from north to south and from east to west. In Aztec mythology each of the four main points of the compass had important religious significance, with its own gods, rituals and colours. Because it mirrored the path of the sun, the east–west axis was the most important one.

chinampas
in Aztec society, human-made floating islands used for agriculture

Source 24 An illustration taken from a manuscript shows the *chinampa* system used by the Aztecs to construct the floating gardens for the city of Tenochtitlan.

The city was divided into four districts. Each district was composed of neighbourhoods called *calpulli*, inhabited by commoners such as craftspeople and farmers. It was possible to travel virtually anywhere in the city by boat. Many of Tenochtitlan's 'roads' were in fact canals, or waterway channels. Six major canals – and many smaller ones – criss-crossed the city.

As Tenochtitlan was built on a lake, the Aztecs living there had no real access to farmland. To fix this, they constructed human-made islands called ***chinampas***. A shallow part of the lake was fenced off and filled with mud until it rose above water level. This provided a bed on which to grow crops, such as maize (corn), tomatoes, potatoes, beans, chillies, peanuts, limes and avocadoes. Canoes took sewage from the city's public toilets to be used as fertiliser on the *chinampas*.



Source 25 An artist's impression of the marketplace in Tenochtitlan, with the *Templo Mayor* in the background

Creating *chinampas*

KEY CONCEPT
Continuity & change

Over time, some things stay the same, while others change. Historians refer to aspects of the past that have remained the same over time as 'continuities', whereas aspects of the past that do not stay the same are referred to as 'changes'.

A *chinampa* is a historical technique that has continued. *Chinampas* are a good example of sustainable farming, and still exist today in Mexico City. They are sustainable because they grow plants while conserving water, and they do not use large areas of land.

Some eco-friendly companies have used elements of the Aztecs' methods for constructing *chinampas* to create new farming innovations.

For more information on this key concept, refer to page 200 of 'The history toolkit'.

Source 26 Organic vegetable crops are grown on a *chinampa* in Mexico City today.

Commerce and tributes

In Tenochtitlan, the centre of commerce was the huge market square, where 60 000 people came each day to buy and sell. There was also a sacred precinct in the centre of the city, surrounded by a wall. Within this precinct were temples, public buildings, palaces and plazas. The Great Temple, or *Templo Mayor*, loomed over everything (see Source 25). The blood on its steps from human sacrifices was visible even from a great distance.

The Valley of Mexico did not have all the geographical requirements needed to keep a city the size of Tenochtitlan running. For example, there was very little land in the valley that could be farmed. Cotton could not be grown in the valley; nor could most food. For Tenochtitlan to survive, it relied on supplies from villages and societies outside the city. Some of the supplies were purchased through trade, but much of the city's wealth and many of its goods were brought in from other parts of the empire through the tribute system.

The populations that surrounded Tenochtitlan were forced to pay taxes as tributes. Each year, Tenochtitlan received 7000 tonnes of corn, 4000 tonnes of beans, 4000 tonnes of amaranth grain and 2 million cotton cloaks. Tributes also included huge amounts of feathers, precious stones and metals, cacao beans (the seed pod from which cocoa is made), tobacco and chocolate.

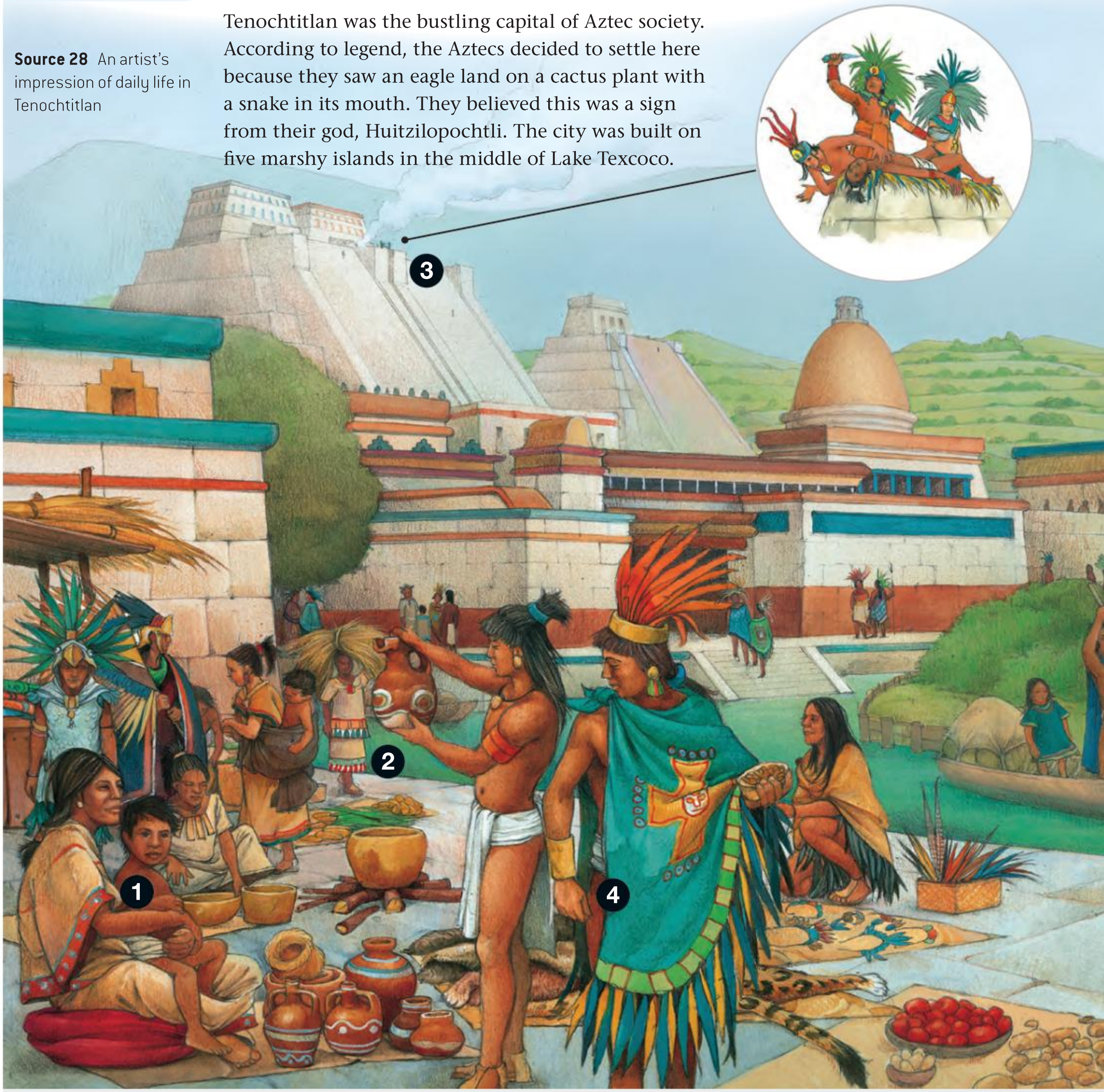
Source 27 The ruins of the *Templo Mayor*, the main temple in the great city of Tenochtitlan

Interactive
Daily life in Tenochtitlan

Daily life in Tenochtitlan

Tenochtitlan was the bustling capital of Aztec society. According to legend, the Aztecs decided to settle here because they saw an eagle land on a cactus plant with a snake in its mouth. They believed this was a sign from their god, Huitzilopochtli. The city was built on five marshy islands in the middle of Lake Texcoco.

Source 28 An artist's impression of daily life in Tenochtitlan



1. When children were young, they were educated at home by their parents. By law, all Aztec children were required to attend school when they became teenagers. This included slaves and girls, which was unlike many other civilisations at the time. Boys and girls attended separate schools. Boys typically learned a trade, such as pottery or farming, whereas girls learned about religion.
2. The markets were the lively centre of the city. Merchants travelled great distances to the markets, by foot or canoe, to sell goods such as feathers, rubber, animal skins and foodstuffs.
3. The *Templo Mayor* (Great Temple) dominated the city. Huge numbers of people – and sometimes animals – were sacrificed at an altar on top of this pyramid to please the gods.
4. Nobles dre
headdress
Clothing w
slave. For
cloth wrap
assisted th
around the

19.5 CHECK YOUR LEARNING

Review and understand

1 Where was Tenochtitlan located?

2 **Identify** Tenochtitlan's population in 1519. How did this compare to Spain's largest city?

3 **List** the geographical limitations of the Valley of Mexico.

Apply and analyse

4 **Explain** why the tribute system was necessary for Tenochtitlan's survival, and suggest what would happen if a group did not pay its tributes.

5 **Distinguish between** the clothing worn by commoners and the clothing worn by nobles. Remember, when you distinguish between two things, you need to talk about how they are different.

Evaluate and create

6 Conduct library and internet **research** into how the Aztec built *chinampas*.

a How have elements of the original Aztec *chinampa* method continued to exist today? What elements of this method have changed?

b Present the results of your research as a step-by-step guide to constructing a *chinampa*. Include labelled and annotated images.

c **Compare** the use of *chinampas* to the typical agricultural techniques used in Australia today. You may need to do some additional research to help you with this.

essed elaborately, with colourful clothing, jewellery and es. They also wore masks during rituals for the Aztec gods. ras important to nobles because they could trade it for a commoners, clothing for men was typically a length of plain ped around the body and knotted on one shoulder. This hem in carrying goods. Women wrapped a piece of cloth eir hips and legs (much like a skirt), and added a loose top.

5 A popular game involved the use of elbows, knees and hips to flick a rubber ball through a stone hoop on the wall. Sometimes the defeated team lost their lives as well as the game!

6 Maize (corn), the staple food of the Aztecs, was ground into a coarse flour to make tortillas (flat bread) to wrap around vegetables and meat.

7 A poor farming family's home on a *chinampa* (artificial island) was made of mud brick, and its roof was made of reeds.

19A

RICH TASK

Life in the Aztec Empire

In the sixteenth century, Spanish conquistadors created many illustrated accounts of daily life in the Aztec Empire so that people at home in Spain could gain a better understanding of traditional Aztec culture. Each of these accounts was bound together to make a special kind of book known as a codex (plural codices). These codices – including the *Florentine Codex*, *Codex Mendoza* and *Codex Magliabecchiano* – have provided valuable information to historians about how the Aztec people lived.

Quizlet

Revise the key terms you have learnt so far.

The *Florentine Codex* is a 12-volume work that was completed over the course of three decades, from 1549 to 1579. It was compiled by a Spanish priest, along with indigenous writers and illustrators. It includes more than 2000 painted illustrations, and documents the culture and religious practices of the Aztecs at the time of the Spanish conquests.

The *Codex Mendoza* was commissioned by Spanish rulers in 1541 to create a record of the Aztec Empire. Illustrations were drawn by indigenous artists, with explanations written by Spanish priests. The *Codex Magliabecchiano* (see Source 20 on page 19.14) was created as a religious document in the mid-sixteenth century.

Source 29 A view of the pyramids of Teotihuacan located in the Valley of Mexico, near of Mexico

Source 30

[Midwife's address to newborn boys:]

My precious son, my youngest one … heed, harken: thy home is not here, for thou art an eagle, thou art an ocelotl [a jaguar] … Thou belongest out there … Thou hast been sent into warfare. War is thy desert, thy task. Thou shalt give drink, nourishment, food to the sun, the lord of the earth. Perhaps thou wilt receive the gift, perhaps thou wilt merit death by the obsidian knife [be killed as a sacrifice to the gods].

[Midwife's address to newborn girls:]

Thou wilt be in the heart of the home, thou wilt go nowhere, thou wilt nowhere become a wanderer, thou becomest the banked fire, the hearth stones … And thou wilt become fatigued, thou wilt become tired; thou art to provide water, to grind maize, to drudge; thou art to sweat by the ashes, by the hearth [the floor of a fireplace].

Extracts from addresses given by midwives to newborn boys and girls, as described in the *Florentine Codex*

Source 31 Illustrations from the *Codex Mendoza* show punishments for children who disregarded instructions from a parent – being forced to inhale dry chilli smoke, and being forced to lie on damp ground with bound hands and feet.

KEY SKILL
Analysing sources

Determining the usefulness and reliability of sources

Primary sources are records produced during the period that is being studied or by someone with first-hand knowledge. They may be written documents such as letters, visual sources such as paintings or artefacts such as building remains. Historians examine these sources as evidence to help them determine what happened during a particular period of time. In doing so, they need to draw conclusions about their usefulness and reliability.

When determining if a source is reliable/useful, you should remember the following:

- Your opening sentence should answer the question by stating if the source is 'reliable/useful', is 'not reliable/useful', or is 'somewhat reliable/useful'. However, if you are saying that the source is 'somewhat reliable/useful', you must have one argument for and against this.
- Using explicit evidence (information that is clearly stated; not just suggested or implied) from the source is the most important thing to do when you are completing a source analysis. This could be a visual observation, a quote from the source (if it is written) or a caption.

Step 1 **Evaluate reliability:** When you are asked to determine if a source is reliable, your response should refer to one or both of the following:

- Is the source primary or secondary? Look at the year the source was created. Was it during the time period or by someone with first-hand knowledge?
- Is the source biased? Look at who created the source and why it might have been created.

Step 2 **Evaluate usefulness:** When you are asked to determine if a source is useful, your response should refer to one or more of the following:

- Is the source reliable?
- Is the source primary or secondary? Look at the year the source was created. Was it during the time period or by someone with first-hand knowledge?
- Is the source biased? Look at who created the source and why it might have been created.
- What is the source saying or showing that will assist me to answer the historical question?
- What additional information would I like that will help me to answer the historical question?

For more information on this key skill, refer to page 213 of 'The history toolkit'.

Practise the skill

Determine the usefulness of Sources 30 and 31 by answering the following questions for each one.

1 **Identify** the type of source (for example, illustration, diary entry, artefact).

2 **Identify** if this is a primary or secondary source.

3 **Describe** what the source tells you. Use specific evidence (for example, a quote or visual observation) to support your response.

4 Is the source reliable? Use specific evidence to **explain** your answer.

5 Is the source useful? Use specific evidence to **explain** your answer.

Extend your understanding

1 Choose a civilisation in the Americas, other than the Aztec, and conduct **research** to locate three primary sources for that civilisation.

   a For each source, **identify** one feature that helps you to understand an aspect of the civilisation.

   b **Explain** which source you believe to be the most reliable and why. Support your answer with reference to the source itself, who produced it, when it was produced and for what audience.

19.6 The Age of Exploration begins

In this topic, you will:

- outline key events involved in Spanish exploration
- explain some of the reasons for Spanish exploration.

Analyse this!

First Landing of Columbus on the Shores of the New World – At San Salvador, West Indies, October 12, 1492

Towards the end of the fifteenth century, great voyages of exploration were being undertaken by the Portuguese and the Spanish, as they sought new sea routes between Europe and Asia. This period became known as the 'Age of Exploration'. While the Portuguese sailed southwards, towards the tip of Africa, the Spanish looked to the west, across the Atlantic Ocean.

At this time, much of the world beyond Europe and Asia was unknown to Europeans, and navigating through unknown oceans was incredibly dangerous. Sailors could use the sun and stars to tell their latitude (how far north or south they were), but there were no reliable ways to establish longitude (how far east or west they were).

Nevertheless, the promise of wealth and riches from finding a new trading route to Asia was strong enough to outweigh the danger. European powers were seeking to expand their empires and establish foreign territories. They did this to gain wealth, power and religious converts. The explorers were attracted by the prospect of material wealth, and the adventure that new lands promised.

Source 1 This painting is called *First Landing of Columbus on the Shores of the New World – At San Salvador, West Indies, October 12, 1492*. Spanish painter Dioscoro Teofilo Puebla Tolin completed this work in 1892.

The voyages of Christopher Columbus

Spain's rulers, desperate to be more powerful than their European neighbours, were prepared to fund a risky voyage led by an Italian explorer, Christopher Columbus. On 3 August 1492, Columbus set sail from Palos, Spain, with three ships – the *Niña*, the *Pinta* and the *Santa Maria* – hoping to find a shortcut to the 'spice islands' of the East Indies (South Asia) and to reach the fabled lands of Cathay (China) and Cipango (Japan).

In October 1492, however, he landed in the Caribbean islands that are the present-day Bahamas, Cuba and Haiti. He thought that Cuba was Cipango (Japan) or perhaps part of the mainland of Asia. In further voyages, between 1493 and 1504, he landed on other islands in the Caribbean, and searched the Orinoco River in South America for a passage into the Pacific Ocean. Having failed to find one, he returned home in poor health. He died in 1506, still believing that he had achieved his aim of discovering a western route to Asia.

Explorers and conquistadors

Columbus was not the first European to arrive in the Americas. However, his voyage is significant because he started the process of colonisation and conquest that would transform the Americas and eventually go on to destroy the established civilisations there, including the Aztec and Inca Empires. The term ‘pre-Columbian’ is used to describe the period before the arrival of Europeans in the Americas.

After the journeys of Columbus, more than 200 ships brought more explorers and wealth-seekers from Spain to the Caribbean. Conquistadors such as Hernán Cortés and Francisco Pizarro took huge risks to explore unfamiliar territories in the hope of enormous reward.

Source 2 Spanish exploration and conquests – key events

1492	Columbus establishes a settlement at Hispaniola (now Haiti and the Dominican Republic), which becomes a launching ground for subsequent Spanish expeditions.
1508–10	Puerto Rico and Jamaica are captured. The first stable settlement on the continent is established in Panama in 1510, governed by Vasco Núez de Balboa.
1511	Cuba is invaded by Diego Velázquez.
1513	Florida, on the northern coast of the Caribbean, is discovered but not colonised by Juan Ponce de Leon.
1515	Balboa becomes the first European to see the Pacific Ocean after ascending a mountain on the Isthmus of Panama (the narrow strip of land that links North and South America).
1517–18	The Yucatán Peninsula – the lands of the Maya – are discovered by Hernández de Cordóba. Mexico’s east coast is explored by Juan de Grijalva, who brings back gold trinkets and stories of rich tribes in the interior.
1518–21	An expedition led by Hernán Cortés reaches the Aztec capital, Tenochtitlan. His soldiers are driven out of the city in 1521, but with the help of Aztec allies, the Spanish capture and destroy the city. This marks the end of the Aztec Empire.
1522	Colonies are established in Venezuela (‘little Venice’), in South America.
1528	The Inca coastline of South America is explored by Francisco Pizarro.
1530–33	Francisco Pizarro sails from Panama with a force of 180 men to conquer the Inca lands. Pizarro’s forces capture the Inca ruler and gain control of the Incas’ largest city, Cuzco. Resistance to the Spanish invaders finally ends in 1572.

Source 3 This magnificent replica of Columbus’ flagship, the *Santa Maria*, was built in 1997–98.

Reasons for Spanish exploration and conquest

Spain's government and its people were motivated to explore and conquer new territories in the America's for a number of reasons (see Source 4).

The quest for gold

Many explorers went in search of wealth, both for the Spanish Empire and for themselves. They hoped to find complex civilisations with great wealth that they could then conquer and **plunder**. Their earliest encounters in the Caribbean, however, did not promise such wealth. Nevertheless, some expeditions had seen tempting glimpses of great civilisations and artefacts made of gold and precious stones.

plunder
to steal, often using violent force

Source 4 Reasons for Spanish exploration and conquest

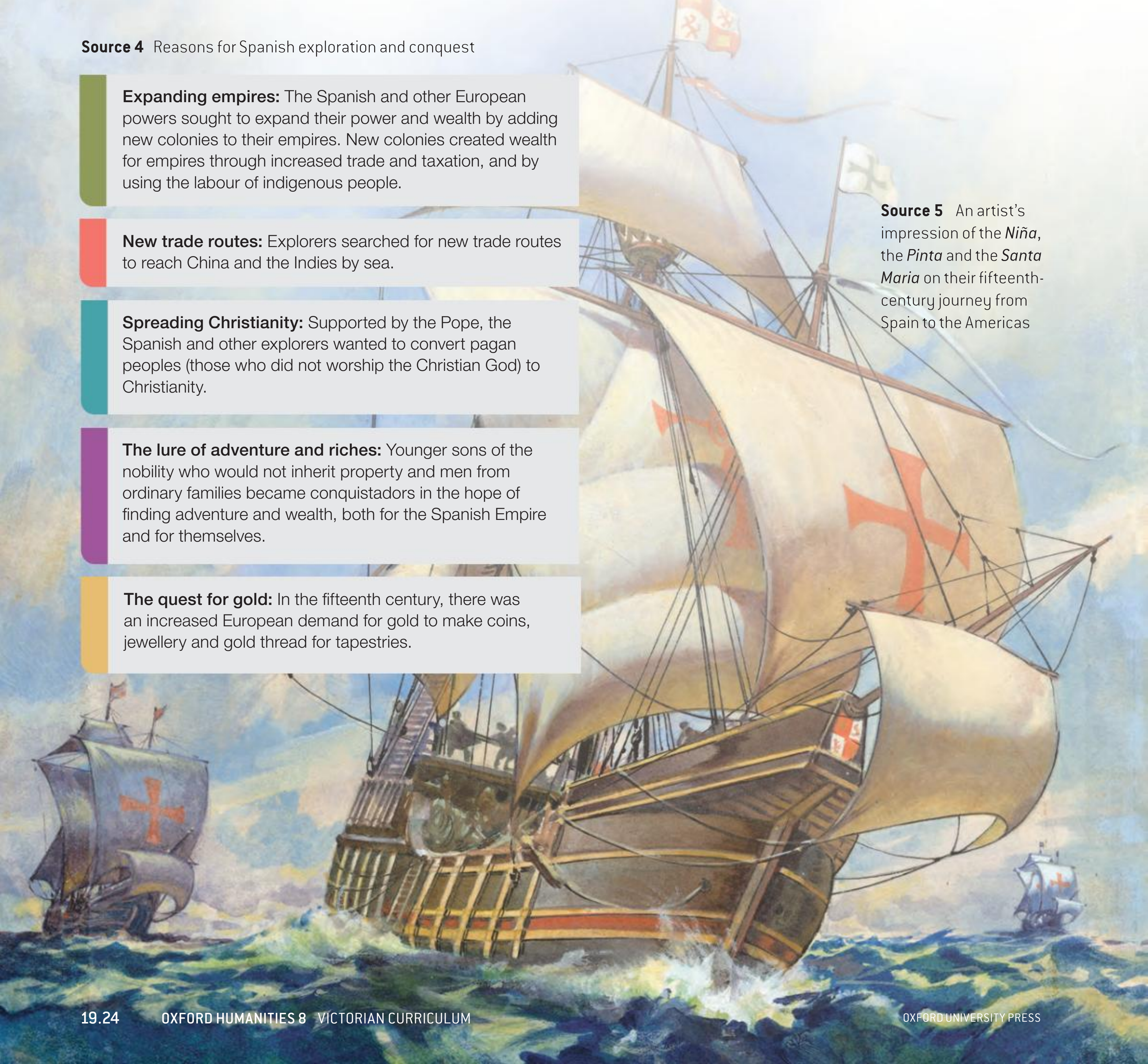
Expanding empires: The Spanish and other European powers sought to expand their power and wealth by adding new colonies to their empires. New colonies created wealth for empires through increased trade and taxation, and by using the labour of indigenous people.

New trade routes: Explorers searched for new trade routes to reach China and the Indies by sea.

Spreading Christianity: Supported by the Pope, the Spanish and other explorers wanted to convert pagan peoples (those who did not worship the Christian God) to Christianity.

The lure of adventure and riches: Younger sons of the nobility who would not inherit property and men from ordinary families became conquistadors in the hope of finding adventure and wealth, both for the Spanish Empire and for themselves.

The quest for gold: In the fifteenth century, there was an increased European demand for gold to make coins, jewellery and gold thread for tapestries.



Source 5 An artist's impression of the *Niña*, the *Pinta* and the *Santa Maria* on their fifteenth-century journey from Spain to the Americas

This encouraged a wave of further exploration and, in both Aztec and Inca territory, the Spanish plundered the wealth and treasures of the empires. Very few gold or silver artefacts have survived because most of the precious metals were melted down to create jewellery or other valuable items back in Spain.

Source 6 Aztec gold jewellery found in Tehuantepec in the 1870s, now held in the British Museum; the Spanish took vast quantities of gold and other precious metals from the empires they conquered in the Americas.

Wealth through tax and slavery

Conquest and colonisation also allowed the Spanish to gain further wealth through taxes. By colonising the Americas, the Spanish could continue to make money by taxing the local population. The Spanish collected the tribute lists from the Aztecs and continued to collect tributes. They also continued the Inca system of *mit'a* (compulsory labour), forcing men to work in the gold and silver mines.

Spanish settlers (usually conquistadors, soldiers or officials) were given responsibility for a certain number of indigenous people. In theory, they were supposed to protect these people, teach them Spanish and convert them to Catholicism. However, under a system called the *encomienda* (labour in exchange for benefits), the indigenous people were usually just kept as slaves.

New territories were also an important source of crops for Spain and for Europe. Many basic and exotic crops that had never been seen in Europe were brought back from the Americas. These included chocolate, tobacco, potatoes, tomatoes, bananas, chillies, corn, turkey, pumpkin, rubber, avocado, peanuts, vanilla and pineapple. Some of these crops, such as tobacco, were extremely valuable in monetary terms.

Spreading Christianity

An important motivation for colonisation, besides wealth, was the desire to spread Christianity to non-Christian peoples. The **Catholic Church** sent missionaries to the Americas to live in the newly established colonies. In fact, there were Catholic priests on some of the initial exploration missions.

Catholic Church
the only Christian Church in Europe until the Protestants started breaking away from Rome in the sixteenth century

19.6 CHECK YOUR LEARNING

Review and understand

1 **Describe** what is meant by the period known as the 'Age of Exploration'.
2 **Identify** the name of the island that Columbus thought was Japan.
3 **Define** the term 'pre-Columbian'.
4 How did the Spanish use taxes to gain wealth?

Apply and analyse

5 **Explain** why the gold and silver artefacts found in the Americas did not remain intact.
6 Choose one of the 5Rs (see page 19.15 and page 212 of 'The history toolkit') and use it to **analyse** the historical significance of Christopher Columbus.
7 Pick three reasons for the Spanish conquest of the Americas. Rank them in order of importance and **explain** why you have prioritised them this way.
8 **Examine** Source 1.
   a Is this a primary or secondary source? Use evidence to **justify** (give reasons for) your answer.
   b How useful is this source? Use evidence to **justify** your answer.

Evaluate and create

9 **Create** a timeline that represents the key events during the Spanish exploration and conquests shown in Source 2. Ensure that the events are sequenced in chronological order, include an even scale, and accurately apply timeline features and terminology.

19.7 The Spanish conquest of the Aztecs

In this topic, you will:

- outline key events since the arrival of Hernán Cortés and the conquistadors in the Americas
- explore reasons for the Spanish success of the siege of Tenochtitlan.

Hernán Cortés was a Spanish conquistador chosen by the governor of Cuba to lead an expedition to the mainland of South America. Like many others, Cortés had come to the Caribbean to escape the poverty of his hometown in Spain and to seek fame and fortune.

In 1519, Cortés set sail with 11 ships and 530 conquistadors. He also took 16 horses and several large fighting dogs. Cortés intended to conquer and colonise on behalf of the king of Spain and in the name of Christianity. He also intended to find the strait that separated the 'island' of Yucatán from the 'mainland', in the hope of finding a route to Asia, as it was still believed that China and India were close by.

Sequence this!
The Spanish conquest of the Aztecs

First contacts, first conflicts

When the conquistadors landed on the eastern coast of Mexico, they heard tales of the powerful Aztec king called Montezuma, who ruled from his capital at Tenochtitlan, several days' march from the coast.

Cortés' first contact with the indigenous peoples of the Americas was with the Totonac people, who were subjects of the Aztecs. The Totonacs promised to support Cortés in the overthrow of their Aztec masters. The support of indigenous groups who resented the domination of the Aztecs was an important aspect of Spanish conquest.

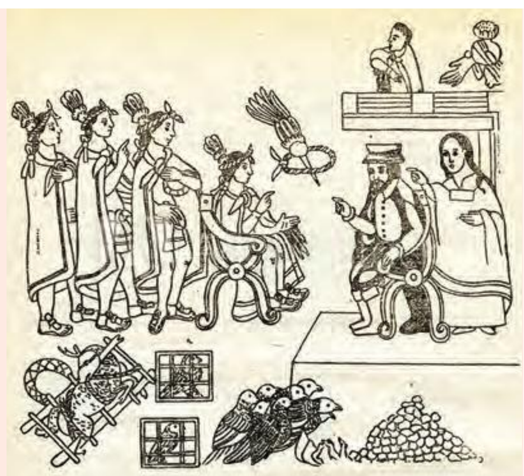
KEY CONCEPT
Significance

La Malinche

La Malinche was an individual who played an important role in the Spanish conquest of the Americas. Her father was the leader of an Aztec clan, which meant that she received an education and could speak multiple languages. When her father died, her mother sold her to slave traders, and eventually she became a slave of the Totonacs.

In 1519, Cortés and the Spanish had their first encounter with the Totonacs. La Malinche was one of the slaves given to the Spanish when the Totonacs and the Spanish formed their alliance. She became Cortés' interpreter and was the mother of his first son, who was the first person of European and indigenous parentage.

Today, there is historical debate on whether La Malinche was a hero or a traitor. This is because while she is believed to have prevented Cortés from taking the lives of more indigenous people, she also relayed messages that led to much devastation.



Source 7 Cortés and La Malinche with Montezuma in Tenochtitlan, 1519

For more information on this key concept, refer to page 201 of 'The history toolkit'.

Cortés set out for Tenochtitlan in August 1519, having added 800 Totonacs to his force of conquistadors. They encountered and fought the Tlaxcalans, an indigenous people whose territories lay midway between the coast and Tenochtitlan. After being defeated, the Tlaxcalans agreed to become allies and march to Tenochtitlan. Cortés then reached Cholula, a town close to the high mountains, where he stayed for several days. The Cholulans were allies of the Aztecs, and were planning to ambush and capture the conquistadors on the road. Cortés learnt of the plan and summoned the Cholulan leaders. They arrived unarmed to the temple courtyard, where they were slaughtered by the Spanish conquistadors.

Source 8 An artist's impression of conquistadors slaughtering the local population at Cholula, in what is now central Mexico

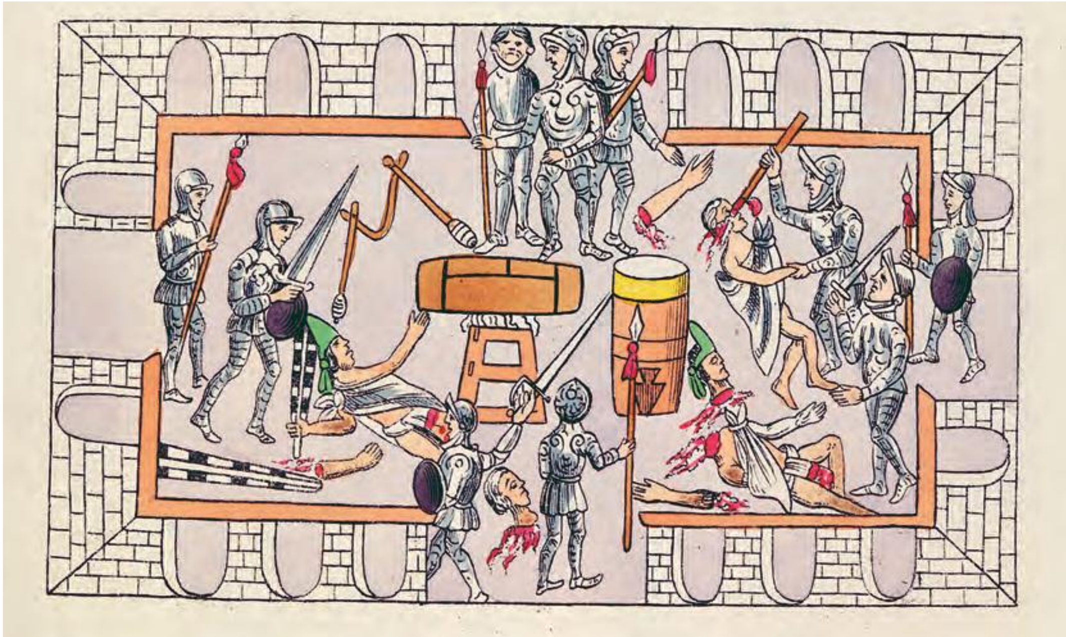
The first allies of Cortés, the Totonacs, returned to their homes laden with gifts from the Spanish, and Cortés left Cholua with a force of around 1000 Tlaxcalans. He chose to cross the mountains over the most difficult pass (now known as Paso Cortés) to surprise the Aztecs.

The conquistadors in Tenochtitlan

The conquistadors reached Tenochtitlan in November 1519. Montezuma met Cortés on the causeway (a raised path) leading into the city. At first, Montezuma believed that Cortés had been sent by the god Quetzalcoatl, but he soon realised that the Spanish were actually after land and treasure. As relations became less friendly, Cortés took Montezuma as a hostage and sent expeditions into the countryside in search of gold, while he continued to collect any treasure he could find in Tenochtitlan.

In May 1520, while Cortés was out of Tenochtitlan, the Spanish massacred a group of Aztec nobles during a festival. This led to an uprising of the city's inhabitants, and Cortés returned to find that the conquistadors had lost control of Tenochtitlan. Montezuma is thought to have been killed by the crowds at this time. In July 1520, the Spanish tried to quietly withdraw from Tenochtitlan in the middle of the night. However, they were discovered and their withdrawal

Source 9 An artist's impression of the fateful first meeting of Cortés and Montezuma



Source 10 An illustration of the massacre of Aztec nobles during a festival, from the *Codex Ixtlilxochitl*, an early seventeenth-century codex fragment

became a desperate fight to escape. Cortés managed to get away unharmed, but hundreds of Spanish soldiers and Tlaxcalans were killed.

The Aztecs believed the Spanish threat was over after they had driven the invaders out of Tenochtitlan; but smallpox had arrived with the Spanish conquistadors, and soon killed around a quarter of the Aztec population of Mexico.

After escaping from the city, the Spanish retreated to the territory of their Tlaxcalan allies. Cortés rested his army for 20 days, and then set off on a campaign to conquer the Aztecs' allies in the surrounding regions. This was the most brutal campaign conducted by Cortés. He won over half of the Aztec territories, with the indigenous people being forced to support the conquistadors. An estimated 15 000 to 20 000 people died in battle; women and children were enslaved, and some captives were given to the Tlaxcalans for human sacrifice and to cannibalise. Other tribes joined the Spanish willingly, to help end the rule of the Aztecs.

I used to think, now I think

Reflect on your learning about the factors that led to the conquistadors taking Tenochtitlan and complete the following sentences.

- I used to think ...
- Now I think ...

What has changed in your understanding?

The destruction of Tenochtitlan

In May 1521, Cortés returned to Tenochtitlan and laid **siege** to the city with a force of 550 Spanish soldiers and 10 000 Tlaxcalans. As well as carrying out daily attacks, he used boats to cut off supplies of food, and destroyed the **aqueduct** that brought fresh water into the city.

The Aztecs, who were already vulnerable after the smallpox epidemic, were finally overcome after a three-month siege. Cortés had originally intended to preserve Tenochtitlan and offer it to the Spanish king as a prize. However, after months of bombardment by Spanish cannons, the once-great city lay in ruins.

The Spanish built a new city on top of the ruins of Tenochtitlan. Stones from the temples, pyramids and palaces were used to build churches and government buildings. The canals that had criss-crossed Tenochtitlan were filled in.

siege
a military strategy to weaken an area by cutting it off from the outside world

aqueduct
a construction – such as a series of pipes or canals – that carries water from a source to a destination further away

Reasons for Spanish success

Historians estimate that around 100 000 Aztecs were killed during the three months that Cortés laid siege to Tenochtitlan. Tens of thousands of Aztecs and other peoples had also been killed as a result of Cortés' military campaigns. In contrast, the Spanish lost fewer than 1000 of the 1800 conquistadors who came to Mexico between 1519 and 1521.

Source 11 Spanish advantages over the Aztecs in battle

	Spanish	Aztec
Weapons	• used steel for their armour and weapons • used gunpowder with powerful cannons and firearms • used horses in battle; before the Spanish came, the Aztecs had never seen horses and were initially frightened of them	• fought with wooden clubs and swords made of obsidian (a hard but brittle form of volcanic rock), which broke against the armour and swords of the conquistadors
Battle tactics	• were well trained in disciplined military manoeuvres; a smaller Spanish force could defeat a larger Aztec force as long as they could maintain their energy	• had a tradition of running at their enemies head on; this meant that only the front ranks could fight, to be replaced by rear ranks as they were cut down
Fighting traditions	• killed enemies from a distance with cannons and guns, retreated when battles were being lost, and attacked villages at night when the inhabitants were asleep	• believed that killing from a distance was not honourable; Aztec battles were highly organised and fought hand-to-hand • were used to only wounding their opponents rather than killing (to capture them for sacrifice); this would often give the Spanish a chance to escape from battle to return to fight another day

19.7 CHECK YOUR LEARNING

Review and understand

1 **Identify** the purpose of the expedition led by Hernán Cortés in 1519.

2 **Identify** the tribes that were allies of the Spanish.

3 **Describe** the incident that caused the Aztecs in Tenochtitlan to rise up against the conquistadors in 1520.

4 **Identify** the tactics Cortés used in his successful siege of Tenochtitlan.

Apply and analyse

5 Choose one of the 5Rs (see page 19.15 and page 212 of 'The history toolkit') and use it to **analyse** the historical significance of La Malinche.

6 **Examine** Source 9.

- a **Identify** the type of source that is shown.
- b **Describe** the scene shown in the source. Give specific detail and evidence to support your response.
- c Is this source primary or secondary? Use evidence to **justify** your response.
- d Is this a reliable source? Use evidence to **explain** your answer.

Evaluate and create

7 'The Aztecs never stood a chance at defeating the Spanish.' **To what extent** do you agree with this? A lot (strongly), a little bit (somewhat) or not at all? Write a 200-word paragraph explaining your position. You should refer to Source 11 and include two reasons to support your response.

8 Imagine that you are an Aztec survivor of the siege of Tenochtitlan. **Write** an account of what you experienced. Draw on the evidence from this topic to help write an account that has a beginning, middle and end.

19B RICH TASK

Quizlet

Revise the key terms you have learnt so far.

Why the Spanish won

Historians have considered a number of reasons why the Spanish were able to cause the downfall of the Aztec Empire with a relatively small force of conquistadors, compared to the huge indigenous population.

The Spanish had superior weapons and benefited from the way in which the Aztec warriors fought. Although Aztec warriors were fiercely courageous, they were on foot and only had wooden clubs, bows and arrows with which to fight. By comparison, the Spanish had horses, steel swords, crossbows, rifles and cannons. In addition, it was so important to Aztec warriors to take live captives that they often ended up fighting the Spanish twice – conquistadors who were captured were rescued, and could then fight again.

The Spanish were impressed with the courage of the Aztec warriors, but they could also not understand why they did not surrender when Spanish victory became clear. However, the Aztecs would never have surrendered. They saw the conquistadors as unpredictable, cowardly and unwilling to follow the rules of battle. Such people were not to be negotiated with.

Source 12 An Aztec depiction of a battle with the Spanish, from *History of Tlaxcala*, a sixteenth-century codex

Source 13

On the second day [of the festival] they began to sing again, but without warning they were all put to death. The dancers and singers were completely unarmed. They brought only their embroidered cloaks … their necklaces, their clusters of heron feathers, their trinkets made of deer hooves … The Spaniards attacked the musicians first, slashing at their hands and faces until they had killed all of them. The singers – and even the spectators – were also killed. This slaughter in the Sacred Patio went on for three hours … The king Motecuhzoma [Montezuma] … protested: 'Our lords, that is enough! What are you doing? These people are not carrying shields or macanas [wooden clubs]. Our lords, they are completely unarmed!'… [The massacre took place] on the twentieth day after the captain [Cortés] left for the coast. We allowed the Captain to return to the city in peace. But on the following day we attacked him with all our might, and that was the beginning of the war.

Extract from an Aztec account of the slaughter of warriors during a festival in May 1520

Source 14

[The Aztec ruler Cuauhtemoc] would prefer to die where he was rather than on any account appear before me … The people of the city had to walk upon their dead while others swam or drowned in the waters of that wide lake where they had their canoes; indeed, so great was their suffering that it was beyond our understanding how they could endure it. Countless numbers of men, women and children came out toward us, and in their eagerness to escape many were pushed into the water where they drowned amid that multitude of corpses; and it seemed that more than fifty thousand had perished from the salt water they had drunk, their hunger and the vile stench. So that we should not discover the plight which they were in, they dared neither throw these bodies into the water … nor throw them [out of the city] where the soldiers might see them; and so in those streets where they were, they came across such piles of the dead that we were forced to walk upon them …

Extract from a letter by Hernan Cortés, describing the end of the siege of Tenochtitlan, in Anthony Pagden (ed.), Anthony Pagden (trans.), *Letters from Mexico*, Yale University Press, 1986, pp. 263–4

KEY SKILL
Asking questions & conducting research

Generating historical inquiry questions

One of the first and most important steps in conducting an historical inquiry is to generate or pose key questions. These questions will frame and direct the research you then undertake. Usually, historians generate one broad question for their inquiry such as: 'What were the reasons for the Spanish victory in the siege of Tenochtitlan?'

After that, you need to generate more specific questions that are related to your overall inquiry question. You can use the following steps to help you develop questions to guide your historical inquiry.

Step 1 Think about what you already know about the topic. Use this knowledge as a springboard for questions that will help you to understand the topic in more depth. Brainstorm everything you know.

Step 2 List, in point form, all the things that you already know about the topic.

Step 3 List, in point form, all the things that you would like/need to know about the topic.

Step 4 Use these two lists to develop a series of questions that will aid your research. You will need to generate three types of questions:

- simple or closed questions, such as 'How did the siege of Tenochtitlan begin?'
- open or probing questions, such as 'How important was the impact of the smallpox epidemic in the downfall of Tenochtitlan?'
- questions that relate to the process of historical inquiry, such as 'What evidence is there that Aztec weapons and tactics gave the advantage to the Spanish conquistadors?'

For more information on this key skill, refer to page 203 of 'The history toolkit'.

Practise the skill

1 Use the process described above to generate one overarching question about the reasons for Spanish success in their conquest of the Aztec Empire. Then develop at least six questions that will help you to address this 'big' question. Make sure that you use at least one of each of the three different types of questions (simple or closed questions, open or probing questions, or questions that relate to the process of historical inquiry).

You should use the material in this unit and the additional sources provided in this rich task.

Extend your understanding

1 Break into groups of three with your classmates. In your groups, **create** a role-play that includes the three main groups of the Siege of Tenochtitlan. Instead of fighting, you will speak to each other and explain your motivations.

a Between you, decide who will play which role:
- the Aztecs
- the Spanish
- the Tlaxcalans.

b Locate relevant information in this textbook, and go online to **research** any extra information you need.

c Write some dot points to take into your role-play. You might want to refer to them, but don't rely on them – remember, it should be a conversation between all three groups!

19.8 The Spanish colonisation of Mexico

In this topic, you will:

- explore the short- and long-term effects of the Spanish conquest on both European and indigenous societies.

Quiz me!
A quick quiz on the Spanish colonisation of Mexico

The defeat of the Aztecs by Hernán Cortés encouraged other conquistadors in their dreams of conquest and wealth. By the mid-sixteenth century, Spain controlled territories more than 10 times the size of Spain itself. The Spanish Empire became one of the greatest trading empires of the early modern world, and lasted until the end of the nineteenth century.

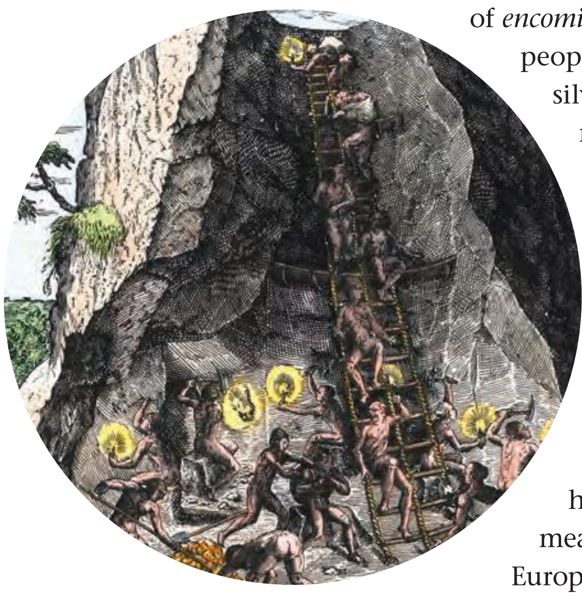
The destruction of Tenochtitlan by Cortés was the beginning of 300 years of Spanish rule in the former Aztec Empire. From Tenochtitlan, Cortés sent expeditions out in all directions to expand Spanish settlement. Territories were divided up and ruled by Cortés, his Spanish companions and even a few Aztecs who had become Christians, such as the son and daughter of Montezuma. Each town was governed by a conquistador, who was meant to ensure that the indigenous peoples under his protection became Christians and good subjects of the Spanish king. In return, the conquistador required their payment of a tribute and their services.

Treatment of the conquered Aztecs

New Spain
claimed Spanish territory during the colonisation of the Americas (1521–1821), including parts of North and South America, as well as some Pacific Islands

A remarkable characteristic of Spanish settlement was the part played by indigenous peoples, including the Tlaxcalans and Aztecs. Their leaders were permitted to ride horses and dress as the Spanish did, and they played an important role in bringing outlying tribes under the rule of **New Spain**. In two to three generations, their descendants became indistinguishable in habits and speech from the grandchildren of conquistadors.

In contrast to the way some of the indigenous leaders were treated, however, the Spanish treated the ordinary indigenous peoples very badly. The system of *encomienda*, which had been put in place to protect the indigenous peoples, in practice enslaved them. The Spanish, greedy for gold and silver, forced the indigenous peoples to work in the gold and silver mines of the Americas, where they were brutally treated and sometimes worked to death.



Source 1 An illustration of one of the large silver mines established by the Spanish

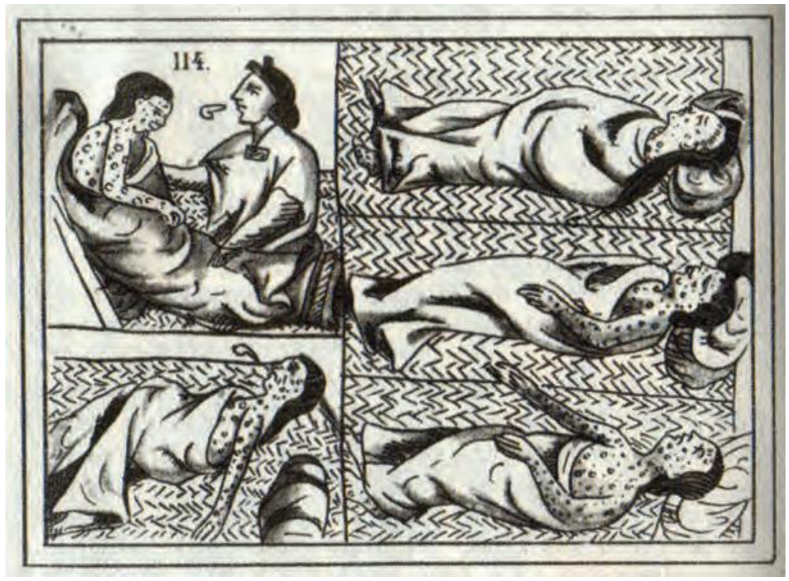
Short-term effects of Spanish colonisation

The spread of European diseases in the Americas

Before the arrival of the Spanish, civilisations in the Americas had never been exposed to people from beyond their region. This meant that they had no immunity to diseases that were common in Europe. The Spanish, in contrast, came from a continent that had been devastated by epidemics for hundreds of years. Most Europeans had some immunity to diseases such as smallpox, measles and influenza.

When these diseases accompanied the conquistadors to the Americas, however, outbreaks among indigenous peoples severely reduced their populations.

There were major outbreaks of smallpox in the 1520s, a measles outbreak from 1531 to 1532, and influenza outbreaks in 1545 and 1576. Plague, whooping cough and mumps also spread. It has been estimated that the indigenous populations in the Spanish colonies dropped by around 75 per cent between 1518 and the 1560s. Some have argued that the effect of these diseases in the Caribbean and South America was worse than that of the **Black Death**. It has been claimed that 90 per cent of the inhabitants of the Inca Empire died from introduced diseases.



Source 2 This drawing from the *Florentine Codex* – by Bernardino de Sahagún, a sixteenth-century Spanish missionary – shows an indigenous man infected with smallpox.

The spread of Christianity

After the Spanish conquest, priests came to set up the Catholic Church in Mexico and other colonies, and carried out thousands of conversions to Christianity. The rapidity of conversion was remarkable, with hundreds of thousands of indigenous people becoming Catholic. Spanish colonies were soon covered in a network of **monasteries**, churches, shrines and parishes. Out of sight of the priests, many indigenous people continued to worship their old gods, but without the element of human sacrifice.

Black Death
a deadly plague that spread across Asia, Europe and Africa during the fourteenth century

monasteries
places where monks live, worship and work

Agriculture and food

From 1522, Cortés brought in European domestic animals – such as cattle, pigs, sheep, goats and mules – from the Caribbean to the mainland of the Americas, and introduced horses to the local populations. He also imported sugar cane, mulberry trees for silkworms, vines, olives and wheat.

European learning and technologies

The conquered peoples adapted quickly to the new European ways – learning Latin script and how to use the wheel and pulley, employing wax candles for light, and working with mules and oxen. They also learnt the advantages of metal nails and screws.

Source 3 The Spanish introduced domestic horses to the Americas as a result of Cortés' expedition.

Long-term effects of Spanish colonisation

Think, pair, share

- Think about the short-term and long-term effects of Spanish colonisation in the Americas. Are there any other effects you can think of that have not been discussed here?
- Discuss your ideas with a partner.
- Share your thoughts with the class.

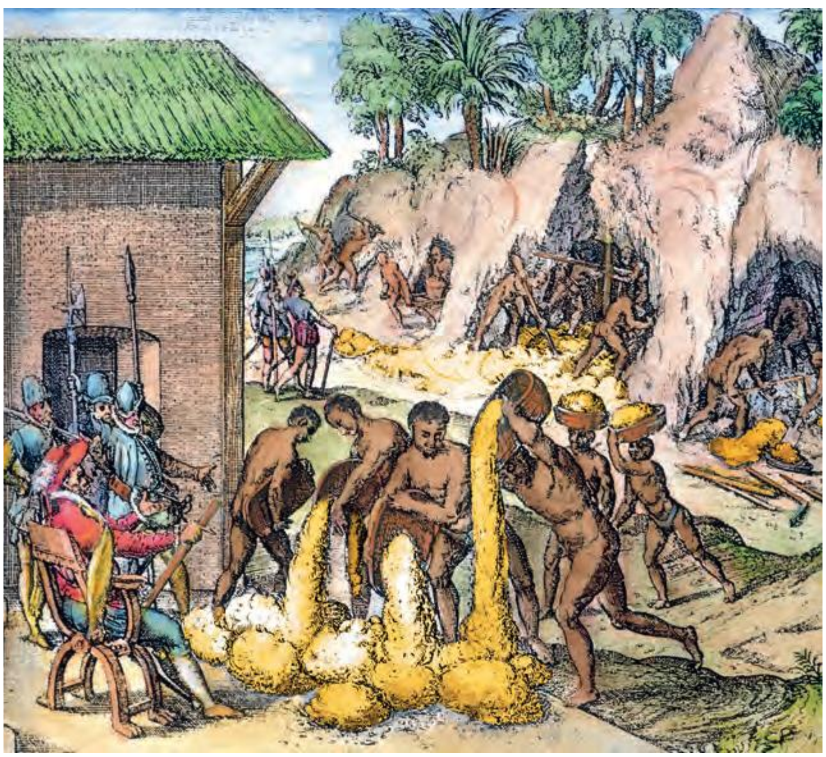
The colonisation of the New World

Explorers from other countries were motivated by Spain's success in finding wealth and new land in the Americas. The initial voyage of Christopher Columbus started a wave of exploration in North and South America by the British, French and Dutch. Spain's great rival, Portugal, also set up colonies in the Americas. Eventually the entire continents came under the control of colonial powers.

Population change, language and religion

Spanish colonisation dramatically changed the ethnic make-up of the Americas. First, many of the indigenous populations were killed by disease. Then, many Spanish people migrated to the Americas after colonisation began. Approximately 240 000 moved to the Americas in the sixteenth century, and another 500 000 in the following century.

One of the legacies of the conquistadors was the spread of the Spanish language, which is by far the most common language in Latin America now. In fact, it is the second most widely spoken language in the world, after Mandarin. However, Brazil's main language is Portuguese. This can be traced back to the Treaty of Tordesillas of 1494. This stated that all lands discovered west of a line drawn from the North Pole to the South Pole through the Atlantic Ocean – and including part of South America – should belong to Spain, and all to the east of the line to Portugal.



Source 4 African slaves at work in the mines of Hispaniola (now Haiti and the Dominican Republic); Africans were first brought to the Caribbean as slaves to replace the indigenous Taino people, many of whom had died from disease and overwork.

The Catholic Church also expanded its worldwide influence after Spanish conquest, spreading to distant regions in South America, Africa and the Philippines.

African slave trade

In the Caribbean, the brutal treatment of the local populations meant that most of them died or were not fit to work on the plantations established by the Spanish. To solve this problem, the Spanish brought shiploads of African slaves to work in the Caribbean and other parts of the Americas in the mid-sixteenth century. This led to an additional change in the ethnic make-up of the population, as outlined above, so that the majority were no longer indigenous but European and African.

A wider impact was the growth of the African slave trade, which became the reason behind one of the great movements of people during the eighteenth and nineteenth centuries. It is estimated that around 12 million

Africans were captured and brought to the Caribbean, South America and Britain's North American colonies before the trade in humans was finally abolished in the nineteenth century.

The Columbian Exchange

The most significant changes resulting from the Spanish colonisation of the Americas in other parts of the world related to the introduction of new crops to Europe and Asia. Imagine Ireland without potatoes, Italy without tomatoes, Switzerland without chocolate, or Thailand without chillies. All these foods were unknown outside the Americas before the Spanish arrived, but became very important to the diets of these countries.

The 'Columbian Exchange' is the term used for the widespread transfer of crops, livestock, people and disease between the Americas and the rest of the world after Columbus arrived in the Americas.

The foods that were brought from the Americas became important sources of nutrition for European populations. Crops such as potatoes and peanuts allowed for more efficient farming, as they could yield more calories per acre than previously grown crops. In addition, foods such as tomatoes and chillies were rich sources of vitamins. In the Mediterranean, such foods enriched diets and improved the health of the population. These improvements in health and nutrition helped to trigger population growth in Europe and other regions.

Source 5 Chillies and maize (corn) are two examples of foods that were unknown outside the Americas before the travels of Columbus.

19.8 CHECK YOUR LEARNING

Review and understand

1 **List** the diseases that the Europeans introduced to the Americas and identify how many people are estimated to have died from them.

2 **Describe** how colonisation changed the population in the Americas.

3 **Outline** why the new food crops from the Americas were so important to the rest of the world.

Apply and analyse

4 **Compare** the way the Spanish treated the indigenous leaders of the Americas and the ordinary people. Remember, when you compare two things, you must talk about how they are similar and different.

5 **Analyse** the effects of the Spanish conquest on either Aztec or European society. Did it lead to progress or decline in your chosen society? Remember, when you analyse something, you need to break it down into smaller parts and talk about how they relate to each other.

Evaluate and create

6 'The Spanish conquest of the Americas led to the progress of Aztec society.' **To what extent** (how much) do you agree with this statement? Write a 200-word paragraph answering this question, including at least two reasons to support your answer.

7 **Research** the wider impact of one of the following aspects of Spanish conquest in the Americas:

- the introduction of European diseases
- forced labour and slavery in the service of Spanish colonisers
- the spread of Christianity
- the introduction of European crops and livestock
- the introduction of European culture and technologies.

Summarise your findings in a graph of your choice. Present your findings in a way that would help other students understand the impact of the Spanish conquest on the indigenous people of the Americas.

19C RICH TASK

Quizlet

Revise the key terms you have learnt so far.

Impact of the Spanish conquest of the Americas

This chapter has concentrated on the Aztec Empire, but the treatment of the Aztecs was typical of the way indigenous populations in the Americas were treated by European colonisers.

Huge numbers of indigenous people in the Americas died through disease, warfare and brutal working conditions under Spanish rule. Some historians think that the Aztec population declined from 25 million in 1520 to 2.6 million by 1570, and that the Inca population declined from 3.3 million in 1520 to 1.3 million by 1570.

Local religious, cultural and social institutions were dismantled by the colonisers. It took hundreds of years for indigenous populations in the Americas to recover from the effects of colonisation, and some historians suggest they never did.

Source 6 A sixteenth-century illustration depicting the arrival of Hernán Cortés and his conquistadors in the Aztec Empire

KEY SKILL
Communicating & reflecting

Writing a historical discussion

Historical discussions present different opinions about particular historical questions or issues. Follow these steps to research and write your own historical discussion.

Step 1 Consider evidence from a range of sources, and outline different possible interpretations of that evidence.

- Consider relevant primary sources.
- Consider the ideas of other historians, presented in secondary sources such as textbooks and websites.
- Record the sources of all of your information.

Step 2 Make a decision as to your view on the issue. Decide what arguments you are going to make, and how you will support them.

Step 3 Write up your discussion. Your discussion should include all the elements listed in Source 7.

For more information on this key skill, refer to page 218 of 'The history toolkit'.

Source 7 Elements of a historical discussion

Introduction	Introduce the topic and the questions or issues to be explored.
Main body	The main body of your discussion is a series of paragraphs that outline different arguments related to the questions or issues. Each point should be supported with evidence.
Conclusion	Sum up the material and give your opinion. Do not say 'I'; instead, say something like 'the evidence suggests …'
Involvement of sources in your writing	In addition to footnoting all of your sources, you should indicate the sources of some of your information as part of your discussion.
Bibliography	All written and internet sources must be acknowledged. See page 205 of 'The history toolkit' for more on how to reference.

Practise the skill

1 Read the following statements and select one. Write an extended response to **discuss** whether you agree or disagree with your chosen statement. Follow the steps and elements listed on page 19.36 to help you.

- 'In the end, the people of the Americas gained more than they lost by the Spanish conquests.'
- 'While we may weep for the poor Aztec killed on the battlefield or conscripted into slavery we might also give two cheers for the conquistadors for having purged [rid] the Earth of a vile culture.'

Extract from Tim Stanley, 'Two cheers for the conquistadors', *History Today* website, 2011

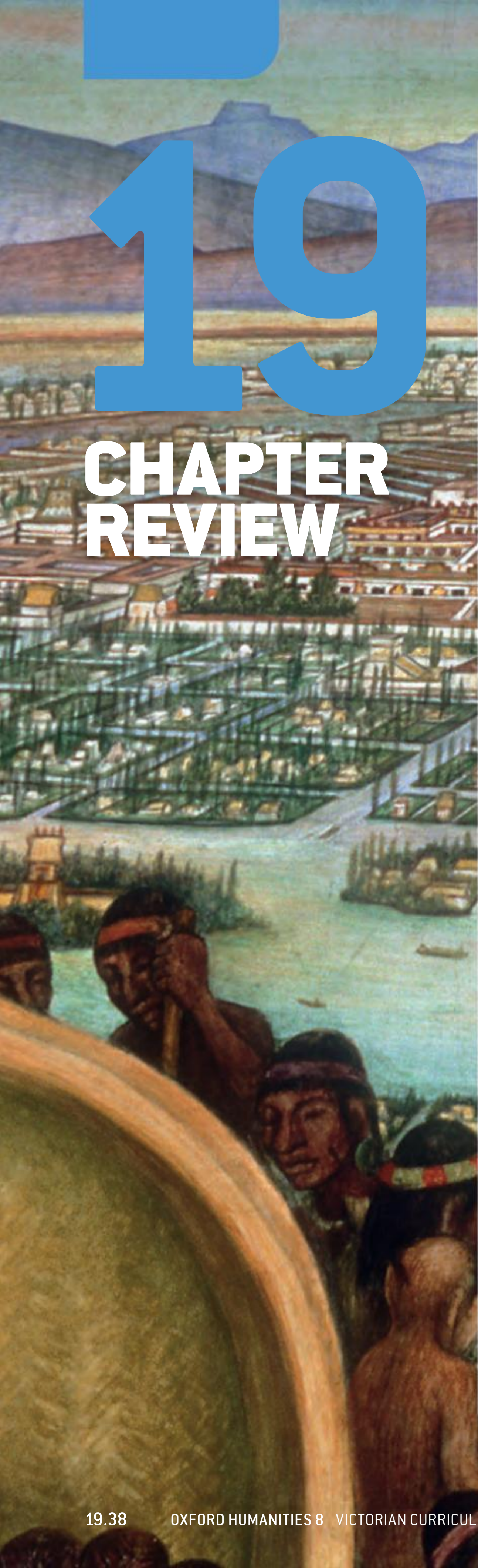
Extend your understanding

1 **Examine** Source 8 and describe the activities presented in the mural.

a What do you think the artist is saying about the Spanish conquest of the Americas?

b **Create** a photo montage or artwork that represents your own depiction of the events and impact of the Spanish conquest of the Americas.

Source 8 This 1951 mural by Mexican painter Diego Rivera, titled *The Conquest or Arrival of Hernán Cortés in Veracruz*, shows details of Spain's colonial domination of the indigenous peoples of Mexico.



19 CHAPTER REVIEW

Review questions

19A How were societies organised in the Americas before the arrival of the Spanish?

1 **Identify** the role at the top of the social hierarchy in Aztec society before the arrival of the Spanish. **List** two of their responsibilities in society. (3 marks)

2 **Explain** why human sacrifice was important to the Aztecs' polytheistic beliefs. (3 marks)

3 **Compare** the treatment of children in the Aztec Empire with the treatment of children in our society today, using examples to support your answer. (4 marks)

(Total: 10 marks)

19B Why did the Spanish colonise the Americas? How were they able to do so?

1 **Summarise** the motivations of the Spanish Government in encouraging the exploration and conquest of the Americas. (3 marks)

2 **Summarise** what happened when Hernán Cortés made contact with the Americas. (3 marks)

3 **Analyse** why the Spanish conquistadors were able to conquer the Aztec Empire. Give specific examples of advantages the conquistadors had over the Aztecs. (4 marks)

(Total: 10 marks)

19C What were the effects of Spanish conquest in the Americas and around the world?

1 **Outline** the impact of the Spanish conquest on the religious beliefs of indigenous populations throughout the Americas. (2 marks)

2 **Analyse** the impact of the Spanish conquest of the Americas on the population of the Americas. Remember, when you analyse something you must break it down into smaller parts and explain how they relate to each other. (4 marks)

3 **Suggest** one way that the Columbian Exchange has impacted your own life today. Explain your response. (4 marks)

(Total: 10 marks)

Review activity

Read the paragraphs below and respond to the questions that follow.

The *Codex Mendoza*

The *Codex Mendoza* was created approximately 20 years after the Spanish conquest of the Americas. It includes a history of Aztec rulers, as well as a description of daily life in Aztec society before the arrival of the Spanish. The Codex gives us an insight into the lives of the Aztecs and is one of best remaining sources about the Aztec Empire.

The Codex is named after Don Antonio de Mendoza, a Spanish official who governed in New Spain for 15 years. In around 1540, he ordered that the Codex be created so that Charles V, the King of Spain, could see what life was like in Aztec society. The Codex was created on European paper and bound in the European style, but the illustrations were drawn in the style of the Aztec peoples.

The cover page, pictured in Source 9, depicts the great city of Tenochtitlan. The city is divided into four parts by blue-green lines that historians believe represent the city's canals.

At the bottom of the image, there are two scenes of military conquest. The Aztec warriors are depicted as strong warriors, towering over the men that they are fighting.

In the centre of the page, you can see an eagle on a cactus. This comes from the Aztec myth of how Tenochtitlan was founded.

Source 9 The cover page of the ***Codex Mendoza***, created around 1541 on the orders of Spanish settler Don Antonio de Mendoza

1 **Identify** whether Source 9 is a primary or secondary source. (1 mark)

2 **Explain** your answer to question 1. (3 marks)

3 **Summarise** the purpose of the *Codex Mendoza*. (3 marks)

4 **Outline** how the *Codex Mendoza* was named. (2 marks)

5 **Identify** one symbol or illustration that represents each of the following elements in Source 9:
- religion and rituals
- war and military
- geography and landscape. (3 marks)

6 Using Source 9 and your knowledge of Tenochtitlan, **describe** the geography of the city. (2 marks)

7 Look closely at Source 9 to answer the following questions about the Aztec's military power.

a **Identify** and **describe** the section of the source that shows military power. (3 marks)

b Although the Codex was commissioned (ordered) by the Spaniard Don Antonio de Mendoza, the illustrations were created by Aztec people. **Suggest** how this might influence the reliability of the depiction of Aztecs as warriors. (3 marks)

(Total: 20 marks)

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Key skill worksheet
Communicating & reflecting: Chapter 19

Quizlet
Play a game of Quizlet on the Spanish conquest of the Americas.

Chapter review quiz
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PART 3

Economics and business

Skills

Chapter 20 The economics and business toolkit 420

Economics and business

Chapter 21 The world of business 428
Chapter 22 The world of work 442

CHAPTER 20

The economics and business toolkit

Economics is the study of how a society shares the limited resources available on Earth to satisfy the needs and wants of individuals. Economics is not only about making money; it is about so much more: how goods and services are made and distributed, the choices we make as consumers, and the consequences of these choices. As much as anything, economics is the study of human behaviour – how people interact with one another locally, nationally and globally. As an economics and business student, you will gain knowledge and skills that will help you make good economic decisions and avoid unnecessary risks throughout your life.

Source 1 Economics is about more than making money. It is about making informed choices and managing resources carefully so that all of us can have our needs met and society can function effectively.

20A
What are the economics and business skills?

20.1 Economics and business skills

Economics and business students use real-life examples to help them to generate questions, analyse information, and argue their point of view. Students also learn through experiences where they are provided with opportunities to be innovative, to show leadership, and to practise making business decisions.

Studying economics and business requires you to analyse information and ask a range of questions to find out more about a topic. You will learn to ask 'what', 'why', 'when', 'where', 'how' and 'who' to uncover the truth about an issue. Your investigation may involve weighing up the costs and benefits of economic or business choices, and making recommendations.

As shown in Source 2, there are four key skills economists use when investigating economics and business issues. These skills are:

1. Asking questions and conducting research
2. Analysing sources
3. Reasoning and decision making
4. Communicating and reflecting.

Source 1 We can access a great deal of information about businesses and the economy.

Source 2 There are four key skills used when studying economics and business. Each of these skills is like a tool in a toolkit.

20.2 Asking questions and conducting research

Developing questions

As an economics and business student, you should ask lots of questions. You should seek out real-life economic and business cases, and undertake investigations to learn from mistakes made in the past. It is important for you to check facts and look at the arguments for and against a certain issue before reaching your own conclusions.

When you have formed your own opinion, you should be able to back up your viewpoint with supporting evidence, such as statistics and quotes.

For example, Source 3 shows how a pizza shop could develop a question and plan to conduct research to decide if it should sponsor the local football team.

Gathering data and information

Sources provide information for economics and business students. Sources can take many different forms, from written records in books or online, to live video and audio recordings. Examples of sources include economic journals, newspaper articles, letters, the websites of government departments and businesses, tweets, blogs and Facebook posts, cartoons and interviews.

Being able to locate a range of relevant, reliable sources is a valuable skill, which usually involves a number of different research methods; for example:

- using online search engines, such as Google
- following social media, such as Facebook and Twitter
- reading newspaper and magazine articles in print or online
- contacting local businesses or asking people who are experts in the subject area.

Source 3 An example of how to develop a question and plan to conduct research when investigating an economics or business issue

Key research question	Information needed	Possible sources of information
Is it a good idea for the local pizza shop to sponsor the local football team?	• How much does it cost to sponsor the local football team? • What is the football team offering in return? • Who and how many people will know about the sponsorship? • How will the sponsorship affect the pizza shop's brand or public image?	• Contact the football team and ask for information about the sponsorship. • Ask past or current sponsors about their experiences of sponsoring the football team. • Conduct fieldwork into the football team's spectator numbers. • Survey current customers at the pizza shop.

Check your learning
Log onto your obook pro to complete the questions for topic 20.2.

For more on the skill of asking questions and conducting research, see the key skill boxes in Rich task 21A (page 434), Rich task 22A (page 448) and topic 22.3 (page 451).

20.3 Analysing sources

Interpreting data

Economics and business students use questionnaires, surveys and statistics from many different sources – such as textbooks, websites, newspapers and the wider community – to gather data. They then create graphs and tables to summarise and represent the information.

Once you have collected, recorded and represented your data, it is time to interpret the data by identifying any trends, patterns, links or relationships in the information. You could use charts, statistical tables, case studies, interviews and simulation games to help identify the cause of a problem or event and its likely outcome or effects.

For example, Andy collected data on a phone company's advertising expenses. His data showed that the more money the company spent on advertising, the more phones it sold. Andy also recorded the number of complaints received by the phone company **employees** during this time. He found that the amount of money the company spent on advertising seemed to have no effect on the number of complaints. This means Andy was able to identify that:

- there was a relationship between advertising and the number of phones sold
- there was no relationship between advertising and the number of complaints received.

employees
people who work for a business

There are many different theories and approaches to economics, which means there are often several different answers to the same problem. It is quite common for two reputable economists to have completely different opinions on the same topic or issue. For instance, another economist may collect different data or find different trends, and think that Andy is wrong and that there is a link between advertising and complaints. Many issues require us to weigh up different points of view, while keeping an open mind.

Check your learning
Log onto your obook pro to complete the questions for topic 20.3.

For more on the skill of analysing sources, see the key skill box in Rich task 22B (page 455).

Source 4 Individuals and businesses analyse a range of information and data to help them make decisions.

20.4 Reasoning and decision making

Evaluating alternatives

There is usually more than one way to solve an economic problem or find the right solution in business. An economics and business student carefully considers all of the circumstances related to an issue with an open mind. They consider the different options and make a rational decision that they believe will lead to the best outcome.

KEY SKILL
Reasoning & decision making

Evaluating options

Evaluating involves considering all the information about an issue and making a judgment based on that information. In economics and business, evaluating information and using reasoning (thinking in a logical way) to make a decision is a key skill.

Before looking at the different options in a business situation, you must first find out more about the topic. Once you know about the topic, you can then assess the options available and choose the best one.

To evaluate options, follow the steps below:

Step 1 Read different sources of information and find out what the experts say about the topic. Write down the different options.

Step 2 Make your own notes as you go, and write down any interesting facts, statistics or information that will help you to explore the options.

Step 3 Next to each option, write down the advantages and disadvantages, or costs and benefits, of that option.

Step 4 Get rid of the options that are weakest, based on their advantages or disadvantages.

Step 5 Concentrate on the strongest options, and either decide which one is best or conduct further research before choosing the best option.

Practise the skill

Let us see how we could apply this skill to help a business owner make the right decision.

Tony owns a popular pizza shop, but he is concerned with the amount of electricity the restaurant is using. He is looking for ways to reduce his electricity costs. A regular customer told him that she installed solar panels at home in order to save on her electricity bill and help the environment. Tony is considering this, as well as other options, for his pizza shop.

Answer the questions on the next page to determine the best choices for Tony.

Source 5 Business owners like Tony are regularly faced with economic choices that can determine whether or not their business is successful.

continued on the next page

continued from the previous page

1 Consider the following options and suggest a third alternative that could help Tony reduce his energy bill:
   a replacing halogen lights in the restaurant with LED lighting
   b installing solar panels on the roof of his restaurant.
2 Beside each option, use the internet to research and write down any additional information that will help you evaluate that option.
3 Identify the advantages and disadvantages of each option.
4 Suggest which option you think would be least suitable for Tony.
5 Suggest which option you think would be most suitable for Tony.

Applying strategies to resolve economics and business issues

Applying the knowledge you have learnt to a real business situation is a valuable experience for an economics and business student. There are a number of ways you can do this, including:

- talking to someone in business about their experiences to see whether the theories you have learnt apply in real life
- observing the world around you – when you next go shopping, think about some of the things you have been studying, such as customer service, competition, **marketing** techniques, and types of businesses
- trying to come up with your own innovative business idea and discussing it with others
- using opportunities to role-play or play simulation games to improve your skills and put what you have learnt into practice.

marketing
activities that businesses undertake to promote the buying or selling of products

Source 6 Observe your surroundings when you next go shopping. Try applying your knowledge of economics and business to familiar situations.

Check your learning
Log onto your obook pro to complete the questions for topic 20.4.

20.5 Communicating and reflecting

Quizlet
Become familiar with economics and business terms by reviewing them on Quizlet.

In every subject, a common language is used. Source 7 lists and defines some commonly used terms in business and economics. Additional business and economics terms are listed in the glossary at the end of this book, and are also defined throughout the chapters.

Source 7 Terms commonly used in economics and business

Term	Definition
Business	an activity that involves making goods or providing services in exchange for money
Consumers	people who buy things to use
Cost–benefit analysis	an estimate of what will need to be paid (cost) and the possible profits (benefit) derived from a business proposal
Economics	the study of how people and society choose to use limited resources to satisfy their needs and wants
Entrepreneur	a person who starts a business or independent organisation, takes risks and uses initiative to achieve success
Income	the money paid to an individual (or business) in exchange for their labour, or for providing a service, or for producing goods
Interest	the amount of money a person has to pay a lender in addition to the original amount borrowed
Investing	putting money into shares, property or other financial schemes in the hope of making a profit
Market	where buyers and sellers interact to exchange money for goods and services
Opportunity cost	what we miss out on when making a choice
Producers	people or businesses that make and sell goods and services for a profit
Profit	the amount of money a business earns after taking away the expenses that it has to pay
Work	a job that returns income for the tasks provided; the tasks or activities done in the course of a job

Check your learning
Log onto your obook pro to complete the questions for topic 20.5.

Reflecting on consequences of alternative actions

After you have gathered and analysed information and data, and made and communicated your decisions based on this research, it is a good idea to reflect on any of your economics or business decisions. Reflecting on your decisions means asking:

- What have been the effects of this decision?
- What might have been the effects of alternative decisions?
- What do I know now, that I didn't know before?
- Why was my decision still the best decision – or, why wasn't it the best decision?

Sometimes, a certain amount of time needs to pass before you can understand the consequences of your decisions. By reflecting on economics and business decisions you have made in the past, you can learn for the future.

For more on the skill of communicating and reflecting, see the key skill box in Rich task 21B (page 439).

Source 8 A business, such as this car manufacturing plant, involves making goods or providing services in exchange for money.

CHAPTER 21

The world of business

Business is everywhere. We all deal with businesses every day – from using something we bought from a shop, to simply seeing or hearing an advertisement. Businesses can vary in size from small local businesses such as cafes, to massive global corporations such as McDonald's. The world's most powerful businesses can earn more money than some small countries. Businesses are responsible for the majority of goods and services produced around the world.

The day-to-day operations of a business will usually involve many different skills. Ultimately, the main goal of a business is to earn money by selling goods and services that consumers want.

Source 1 Almost everything we use in daily life is purchased from a business.

21A

How do innovation and entrepreneurship help a business reach its goals?

21B

What does it mean to be a responsible business?

21.1 Goals of a business

In this topic, you will:

» understand how businesses set different goals.

While the main goal or objective of most businesses is to make a **profit**, there are many other goals that a business may wish to achieve. These might include growing the business over time or improving an area of the business's operations. A good business will set goals, so that everyone in the business knows what they are working towards and can focus on achieving this. Ensuring that everyone in the business is working towards the same goals is key to the success of a business.

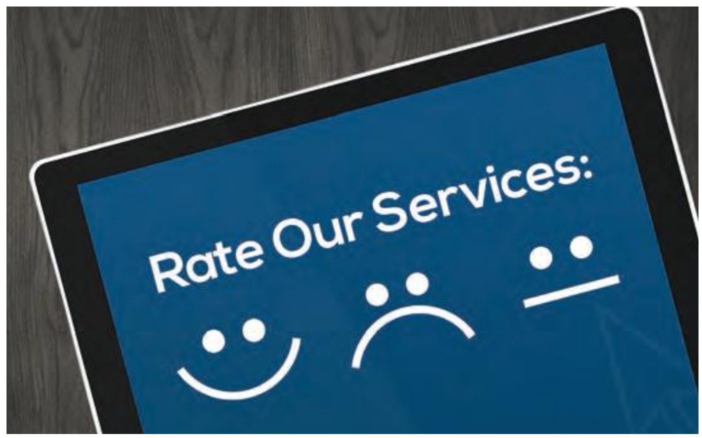
profit
the amount of money a business earns after taking away the expenses that it has to pay

SMART goals

It is very important for a business or entrepreneur to set the right goals. A goal-setting technique commonly used by both individuals and businesses is the SMART goal principle (see Source 1).

- **S** Specific – the goal is clear and easy to understand. It states exactly what will be achieved and when.
- **M** Measurable – the goal is measurable in dollars, time, quantity, etc.
- **A** Achievable – the goal is challenging, but it can be reached.
- **R** Relevant – the goal is something that the individual or business should be aiming to achieve.
- **T** Time-bound – there is a realistic time frame within which the goal should be achieved.

Source 1 Businesses and individuals can use the SMART goal principle to help them set the right goals.



Source 2 A business might set a goal of improving customer satisfaction.

Financial versus non-financial goals

Financial goals are directly related to money. A business will often set financial goals around increasing its sales and profit or reducing its costs. For example, a small business might set a goal to increase its sales by 10 per cent from one year to the next.

Non-financial goals are those that are not directly related to money. Although many of these goals will eventually help the business to earn money, they are not based on or measured by dollar amounts. Businesses might set non-financial goals around improving customer satisfaction, training employees or reducing their environmental impact. For example, a small business might want to increase its level of customer satisfaction by 5 per cent over the next six months. It could measure this by asking customers to complete a survey about their experience with the business.

Once a business has set its goals, it can develop a **strategy** for how it will best achieve them. For example, it might plan to achieve its goal of improving customer satisfaction by training its employees to deal with customer complaints in a friendly manner.

strategy
a plan for achieving goals

A shared vision

Entrepreneurs (see page 432) may have more creative goals than to just make a profit. For example, they might want to develop a new **product**, improve an existing service using new technology, or improve the lives of other people. An entrepreneur is not only able to create and commit to a vision for the business themselves; they also have the ability to get people to help them make that vision a reality. Sometimes the vision itself is so powerful that people will simply accept it; but at other times the entrepreneur needs to persuade other people of the benefits of the idea, so that they share the entrepreneur's passion and motivation for achieving it.

entrepreneur
a person who starts a business or independent organisation, takes risks and uses initiative to achieve success

product
an item (either a good or service) that is offered for sale

Source 3 Sabri Suby is an Australian entrepreneur who started the digital marketing agency King Kong in 2014. The business is now very successful as a result of Suby having goals for the business and a strategy for growth.

21.1 CHECK YOUR LEARNING

Review and understand

1 **Identify** the main objective of most businesses.

Apply and analyse

2 **Distinguish between** financial and non-financial goals. Remember, when you distinguish between two things you must talk about how they are different.

3 Refer to Source 1 and **determine** (decide) whether the following goals are SMART. Explain why or why not in each case.

  a The business will be better than its competitors in the next financial year.

  b The business will increase its level of sales by 10 per cent over the next six months.

  c The business will offer three new products.

Evaluate and create

4 **Create** a SMART goal that you wish to achieve. You may wish to focus on improving your marks at school during the year or learning to play a certain number of songs on an instrument by the end of the term. Make sure you reflect on whether or not you have achieved your goal when the time you set for it has finished.

Quiz me!
A quick quiz on business goals

I used to think, now I think
Reflect on your learning about the kinds of goals that businesses set, and complete the following sentences.
- I used to think …
- Now I think …

What has changed in your understanding?

21.2 Entrepreneurship and innovation

In this topic, you will:

- explore the meaning of entrepreneurship and innovation
- identify the characteristics of entrepreneurs and innovators.

Key skill worksheet
Communicating & reflecting: Presenting research

Entrepreneurship

'Entrepreneurship' refers to taking risks and using initiative to set up a business in order to achieve success. Entrepreneurs see an opportunity or have an idea for a new business that will earn them an income and possibly satisfy other personal goals.

Not all businesses are successful. Entrepreneurs risk losing the time, effort and money that they have invested in the business idea if it does not work out.

Successful entrepreneurs often have these characteristics:

- willingness to take calculated risks
- resilience, or the ability to bounce back from failures
- a strong work ethic
- passion for the business they are in
- an understanding of finances.

CASE STUDY

Successful entrepreneurs

When Melbourne woman Kate Morris (see Source 4) was at university, she worked at a cosmetics counter. There, she discovered that many women found shopping in department stores to be intimidating. Wanting to create a more user-friendly beauty shopping experience, she founded the online cosmetics store Adore Beauty in 1999 from a garage in Melbourne, when she was 21. She started her business selling two cosmetic brands, and now sells more than 200 brands.

Another successful entrepreneur is Elon Musk (see Source 5), a South African-born American businessman and the co-founder of the electronic payment company PayPal. Musk's long interest in electric cars led him to become a major investor in Tesla Motors, now renamed Tesla. Tesla's first electric car, the Roadster, could travel over 390 kilometres on one charge and go from 0 to 97 kilometres per hour in less than 4 seconds.

Source 4 Kate Morris, founder and CEO of Adore Beauty

Source 5 Elon Musk, co-founder of Tesla

Think, pair, share

- Think about a famous global business. How do you think it became famous?
- Discuss your ideas with a partner.
- Share your thoughts with the class.

Innovation

Innovation is the act of creating or starting something new and different. Innovators can improve on an existing idea or create something completely new from scratch. Quite often, an innovative idea will present an opportunity for an entrepreneur to start a business.

Businesses that are innovative will be successful, as they are constantly finding new ways to stay ahead of their competition. This is known as having a **competitive advantage**, and is incredibly important for today's businesses, which can face competition from all over the world.

Innovation not only creates business opportunities, but can also benefit society. It is responsible for nearly every item that you use every day.

Successful innovators often have these characteristics:

- They question everything and consider new possibilities.
- They observe their surroundings and look for ways to improve things.
- They make connections with different types of people and are open to different ways of thinking.
- They experiment with new ideas.
- They draw connections between the different things that they learn about.

Source 6 Apple is an example of an innovative business. It consistently brings out new products, including the Apple Watch, MacBook and iPhone.

Special circumstances, such as the COVID-19 pandemic, often inspire businesses to innovate. In an effort to stop the spread of the virus, governments in many parts of the world imposed 'lockdown' restrictions, which meant that people were unable to leave their homes except for essential reasons. A great number of consumers turned to online markets. Large businesses such as Amazon that already offered online shopping saw a huge increase in customer orders, and their profits soared. Many other businesses that had only operated from a physical shop changed their business model and started offering online shopping.

competitive advantage when a business is able to outperform other businesses, e.g. by producing better or cheaper products

21.2 CHECK YOUR LEARNING

Review and understand

1 **Identify** three common characteristics of an entrepreneur.

2 **Identify** three common characteristics of an innovator.

Apply and analyse

3 **Distinguish between** an entrepreneur and an innovator. Remember, when you distinguish between two things, you must talk about how they are different.

4 **Explain** why you think each of the five entrepreneurial characteristics would be important for anyone who is starting their own business.

5 **Explain** how the COVID-19 pandemic created business opportunities.

Evaluate and create

6 **Create** a visual display to show what an entrepreneur is. Include the characteristics of a successful entrepreneur.

7 **Research** a famous innovator. Write a short biography and list the key characteristics that you think would have helped them to become a successful innovator.

21A RICH TASK

Quizlet
Revise the key terms you have learnt so far.

Social entrepreneurs: Thankyou

Not all entrepreneurs are interested only in making money for themselves. Social entrepreneurs, such as the founders of the Thankyou Group, aim to make the world a better place through their business activities.

Thankyou was started in 2008 by enthusiastic Australian university students Daniel Flynn, Justine Flynn and Jarryd Burns. They saw an opportunity to help the 900 million people who did not have access to safe drinking water by starting their own not-for-profit bottled water business, named Thankyou Water. Although it took three years before the product saw some success, it eventually became popular with consumers who wanted to know their money was going to a good cause.

Thankyou has given millions of dollars to fund projects in over 17 countries, providing hundreds of thousands of people with water, food, and hygiene and sanitation solutions. Thankyou is an example of what people can achieve when they use their entrepreneurship to make a difference.

Source 7 The Thankyou Group has helped people in need across 17 countries, including Kenya.

Source 8 The Thankyou Group was founded to help provide people around the world with safe drinking water.

KEY SKILL
Asking questions & conducting research

Interviewing an entrepreneur

How do we learn more about how and why entrepreneurs do what they do? With the right approach and preparation, interviews can be a great way of finding out more, firsthand. By interviewing somebody, you develop questions and collect information from the person's answers. Follow these steps to prepare and conduct an interview:

Step 1 Respectfully approach an entrepreneur and politely request to interview them at a time that suits them.

Step 2 Prepare a list of questions that you wish to ask. Because entrepreneurs are often busy running their business, a good idea would be to ask a maximum of 10 questions. Your questions could focus on the following areas:

- the business and how it runs
- the reasons they became an entrepreneur
- what it takes to be an entrepreneur
- the challenges and successes faced as an entrepreneur.

Step 3 Prepare the right equipment. It is better to record the interview with your smartphone or camera than it is to try to write down the responses to your questions as you go, but remember to ask permission before you record someone.

Step 4 Conduct the interview. Make sure you are well presented, polite and arrive on time. When you complete the interview, be sure to ask the entrepreneur if they have any questions for you, and thank them for their time.

Step 5 Write up the interview responses and any other notes you made from the interview.

Step 6 Send a written thank you note to the entrepreneur.

For more information on this key skill, refer to page 423 of 'The economics and business toolkit'.

Source 9 Co-founders of the Thankyou Group Jarryd Burns, Daniel Flynn and Justine Flynn see business as a way of helping people, rather than just making money.

Practise the skill

1 Follow the steps on this page to conduct your own interview of an entrepreneur or a small business owner. Make sure you are supervised by an adult when you conduct the interview. If this is not possible, you can conduct the interview through a video or phone call.

2 Prepare a 200-word report that **summarises** what you learnt from the interview and how it helped you to better understand the world of business.

Extend your understanding

1 **Research** the Thankyou Group (its website is a good place to start) and write a brief report on how this social enterprise is helping those in need.

thankyou.

Source 10 The Thankyou Group range now includes body-care and baby products.

Weblink
The Thankyou Group

21.3 Responsible businesses

In this topic, you will:

» learn about the legal rights and responsibilities of businesses in Australia.

A business owner has legal rights and responsibilities. In running their business, a business owner must follow the law. While they have the right to legally make a profit from their business, they should do so in a way that does not harm the community or the environment. This is known as **social responsibility**.

social responsibility the duty to conduct business in a manner that benefits the community and the environment

product safety recall when a business must notify consumers and organise for a faulty or dangerous product to be returned to the business

Legal rights and responsibilities

There are many laws that outline the rights and responsibilities of business owners and consumers in Australia. These laws protect both businesses owners and consumers from unfair treatment. This topic discusses some of the laws that relate to businesses.

Competition and Consumer Act 2010 (Cth)

The *Competition and Consumer Act 2010* (Cth) sets out the rules that businesses and consumers have to follow when buying and selling products. The rules in this Act are enforced by the Australian Competition and Consumer Commission (ACCC). The *Competition and Consumer Act* covers a wide range of issues, including the safety and quality of products, refunds and advertising. It also protects the right of a business to compete in a market without being treated unfairly by other businesses. This Act was put in place so that both businesses and consumers would get a 'fair go'.

Key skill worksheet
Analysing sources: Product safety

The rights and responsibilities of employers

As an employer, a business owner has many rights and responsibilities when it comes to dealing with their employees. For example, a business owner must ensure that their employees are treated fairly and equally, and are not discriminated against on the basis of their gender, race, beliefs, sexual orientation, disability or any other personal characteristic. An employer must also provide a safe and healthy working environment at all times.

Product safety recalls

Businesses are responsible for providing safe products to consumers. If a business has sold a product that is faulty or dangerous, the business owner must organise a **product safety recall**.

Source 1 All businesses must ensure their employees are treated fairly.

In 2016 in Australia, a number of car manufacturers were legally required to recall certain cars after it was discovered that the cars had been installed with faulty airbags. Many well-known car brands were affected – including BMW, Honda, Mazda, Nissan and Toyota – because they had sourced their airbags from the same supplier. The faulty airbags have been linked to at least 32 deaths and 350 injuries around the world.

Consumers can find all product safety recalls in Australia by visiting the Product Safety Australia website, which is run by the ACCC.

Social responsibility

A business owner can be socially responsible by always considering the impact of their business on the community and the environment when making decisions. This can include implementing environmentally friendly practices such as recycling, reducing waste and decreasing pollution. For example, some businesses might only buy their materials from ethical sources, so that no child labour, sweatshops or destructive farming practices are involved. A business can also be socially responsible by giving donations to charities.

Finding the balance between making money and being socially responsible can be a tricky but rewarding task. While doing the right thing may be more expensive, it can often be more profitable in the long run. Socially responsible businesses are likely to attract customers who want their money to go to businesses that 'do their bit' for the community and the environment. These businesses are also less likely to lose employees, who may not want to work for a business that does the wrong thing.

Source 3 WorkSafe is a state government body that promotes and enforces safety in Victorian workplaces. One of WorkSafe's responsibilities is to inspect workplaces, particularly those with high injury rates and potential safety hazards.

Source 2 Who Gives a Crap is a socially responsible Australian company that sells toilet paper and other paper products. It donates half of its profits to building toilets throughout the developing world.

21.3 CHECK YOUR LEARNING

Review and understand

1 In your own words, **define** 'social responsibility'.

2 **Identify** the legislation that protects businesses and consumers.

3 **Outline** the responsibilities business owners have towards their employees.

Apply and analyse

4 Look at Source 2. Do you think consumers are more likely to buy products from the Who Gives A Crap business, rather than from another toilet paper company? **Explain** your answer, using evidence from this topic to support your points.

Evaluate and create

5 Think of a business you shop from. Use the internet to **research** the business to see if it is socially responsible. Brainstorm a list of things the business owners could do to be more socially responsible.

21B RICH TASK

Quizlet

Revise the key terms you have learnt so far.

Socially responsible business: The Body Shop

The Body Shop is a cosmetics company that was founded by Dame Anita Roddick, who once said: 'Business shapes the world. It is capable of changing society in almost any way you can imagine.'

The Body Shop started in England in 1976 and opened its first Australian store in 1983. It is now well known around the globe and has 3000 stores worldwide, including 90 in Australia.

Much of The Body Shop's success is due to its reputation as a socially responsible business, as well as the quality of its products. Over the years, The Body Shop has run campaigns relating to human rights, protecting animals and saving the environment. The business has also shown its commitment to boosting body image and self-esteem. Through these actions, The Body Shop has won the support of many consumers.

In 1990, the business started its own charity, The Body Shop Foundation. The foundation gives financial support to innovative organisations that are unlikely to receive funding from other sources. It focuses on assisting those who are working in the areas of human rights and civil rights, saving the environment and protecting animals.

The Body Shop regularly monitors its impact on society and the environment through official investigations, called audits. The business releases this information publicly and uses it to improve its social responsibility strategies.

Source 4 The founder of The Body Shop, Dame Anita Roddick, died in 2007, but the core values she instilled in the business remain present today.

THE BODY SHOP

Source 5 The Body Shop is a business that is internationally renowned for its commitment to social responsibility.

Source 6 The Body Shop has 90 stores in Australia.

KEY SKILL
Communicating & reflecting

Creating a concept map

A concept map is a visual display of ideas and how they link to one another. Ideas are usually represented in boxes or circles. When there is a relationship between ideas, the boxes or circles are connected with lines. Words can be placed on the lines to explain the relationship between the ideas. A concept map is a great way to show others what you are thinking and to keep track of your thoughts. You can map out your ideas on paper, or on your computer or tablet.

To create a concept map, follow these steps:

Step 1 Identify a topic you are interested in. In the example shown in Source 7, the topic is 'cosmetics business'.

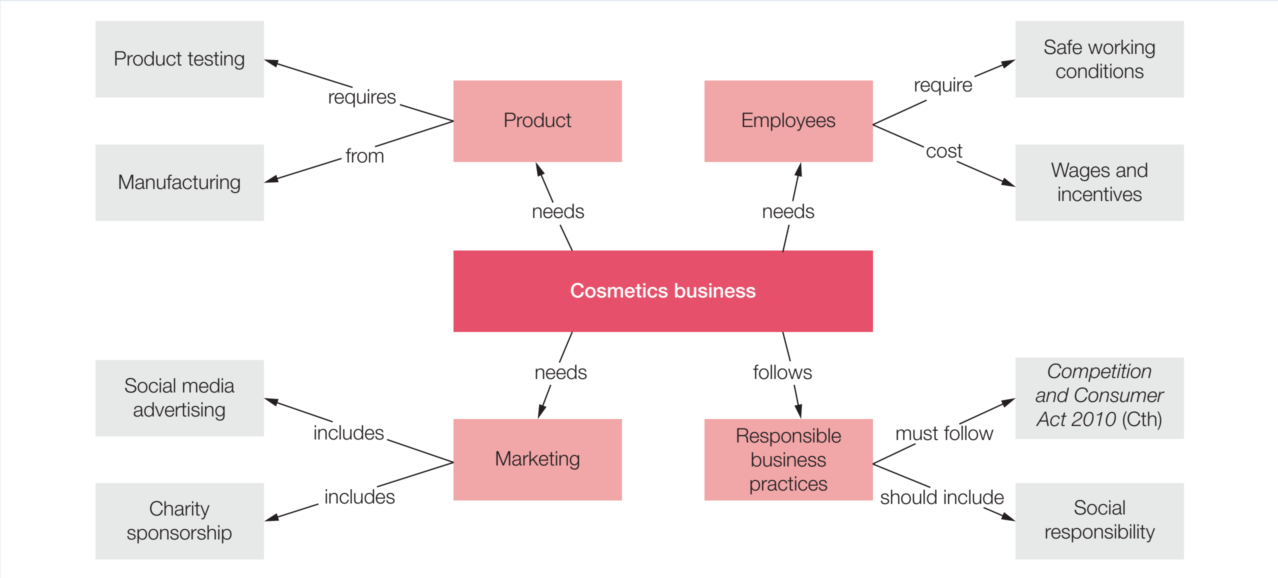
Step 2 Write down the name of the topic and a list of all the main ideas that are related to the topic.

Step 3 Connect related ideas with a line. Add a word or two to a line if the relationship needs clarification.

Step 4 Keep adding ideas that relate to or follow on from the main ideas you have identified. Use the same process as in the previous step.

For more information on this key skill, refer to page 427 of 'The economics and business toolkit'.

Source 7 A basic concept map exploring a cosmetics business



Practise the skill

1 Follow the steps above to **create** a concept map for the topic 'social responsibility'.

Extend your understanding

1 **Research** The Body Shop (their website is a good place to start) and write down a list of things that the company does to be socially responsible.

2 **Identify** two benefits you think The Body Shop receives by operating in a socially responsible way.

3 **Explain** the potential costs or disadvantages of The Body Shop being socially responsible.

Weblink
The Body Shop

21 CHAPTER REVIEW

Review questions

21A How do innovation and entrepreneurship help a business reach its goals?

1 **Define** the term 'SMART goals'. (1 mark)

2 **Summarise** why opening a business can be risky as well as rewarding. (3 marks)

3 'All entrepreneurs are innovators.' **To what extent** do you agree with this statement? A lot (strongly), a little bit (somewhat) or not at all? Write a short paragraph explaining your position. (6 marks)

(Total: 10 marks)

21B What does it mean to be a responsible business?

1 **Identify** the authority that enforces the *Competition and Consumer Act 2010* (Cth). (1 mark)

2 **Summarise** whether you think a business should consider the environment in its day-to-day operations. (3 marks)

3 Would you buy products from a business that mistreats people and animals? **Justify** (give reasons for) your answer. (6 marks)

(Total: 10 marks)

Source 8 Opening a business can be both risky and rewarding.

Review activity

Read the information and answer the following questions.

Finding a niche

Sometimes the idea for a business comes about because somebody sees a specific need that is not being filled. The business is able to meet this need by focusing on offering a specific good or service.

Code Like A Girl is an Australian business founded by Ally Watson. Watson loves working with technology, but found that she often felt isolated in this male-dominated industry. She began Code Like A Girl as an event in 2015, to meet other females who code. It has grown into a social enterprise that aims to provide young women with the confidence needed to enter the world of coding.

Code Like A Girl is based on the belief that technology is a key element of our ever-changing world, and that it needs more women involved in 'building' technology – not just using it. The business offers short online courses for both adult women and girls from the age of eight. For adults, these courses range from learning more about the foundations of web development to programming.

Code Like A Girl also offers internships, where women can do paid work experience with companies such as the Australian Academy of Science, CSIRO, Equifax and PricewaterhouseCoopers.

Source 9 The Code Like A Girl team is made up of passionate people who enjoy coding.

1 What goods or services does Code Like A Girl offer to potential consumers? (1 mark)

2 Do you think the founder of Code Like A Girl had a financial or non-financial goal when starting her business? **Explain** your response. (3 marks)

3 Do you think Code Like A Girl is a socially responsible business? **Justify** your answer. (6 marks)

4 **Evaluate** whether or not Code Like A Girl is a successful business. Do this by considering its strengths and weaknesses, and giving your overall opinion. (10 marks)

(Total: 20 marks)

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Student book questions
Chapter 21

Key skill worksheet
Communicating & reflecting: Chapter 21

Quizlet
Play a game of Quizlet on The world of business.

Chapter review quiz
Chapter 21

CHAPTER 22

The world of work

People work in many different occupations. Some people work in an office, some people work from home, others work in a factory or shop and still others work outdoors. Work is an important part of the way people live. People work for material reasons, such as to earn money, as well as for non-material reasons, such as self-esteem and sense of community. As we go through life, we need to earn money in order to afford basic things such as food and clothing, as well as luxuries such as holidays or a new phone. One of the main reasons why you go to school is to gain the skills, knowledge and personal abilities that will help you be a constructive member of the Australian workforce. Not only does work benefit us individually, but it also contributes to the collective well-being of the Australian economy.

Because work plays such an important part in our lives and the economy, it is important to understand how the future of work is shaping up and how this might affect us in the years ahead.

Source 1 There are many different kinds of jobs. Some work is full time and some is part time or casual. People work to earn an income, but also to feel a sense of pride and belonging.

22A
How will the way we work affect our lives in the future?

22B
How and why are workplaces different around the world?

22.1 Why we work

In this topic, you will:

» understand the ways work contributes to the well-being of individuals and society.

Work provides us with an income that allows us to buy the things we want and need. Work also provides people with many other benefits. The reasons why people work can be grouped into different categories:

- material reasons (related to financial gain)
- non-material reasons (not related to financial gain).

In reality, both material and non-material reasons for working (see Source 1) affect how we feel about our place in society and how happy we are.

Source 1 A range of material and non-material reasons for working

Material reasons for working	Non-material reasons for working
• Income (i.e. money earned by a person in exchange for goods or services that can be used to buy things such as food, clothing, cars, houses) • Superannuation (i.e. money paid into a fund that can be accessed when a person retires) • Other financial benefits (such as cash bonuses, car allowances, meal allowances, staff discounts)	• Ability to learn new skills and improve existing skills • Sense of pride, value, respect, identity and/or personal achievement (which help people's physical and mental health) • Opportunity to contribute to the success of an organisation • Ability to help people and/or make a difference for an important cause (such as refugees, animal welfare, the environment) • Opportunity to express creativity and try new things • Opportunity to build strong relationships with work colleagues (and make new friendships) • Ability to achieve a good 'work–life balance' (see page 447)

Source 2 While income is important, people do not work for money alone.

Understanding material reasons for working

As shown in Source 1, there are many different material reasons why people choose to work, but earning an income is probably the most important among them.

Earning an income

Depending on the type of work people do, their income can be paid in different ways:

- People who work for companies or organisations that they do not own (employees) earn a **wage**. A wage is a fixed amount that is paid regularly (for example, weekly, fortnightly or monthly) to an employee in return for work they do for the company. For example, an employee who works at a local supermarket might earn their wage by working on the checkout or stacking shelves for 25 hours a week. They will be paid for the hours they work.
- People who own their own company or organisation (business owners) earn **profits** taken from the business. Business owners might not earn a regular amount or be paid regularly. Instead, they may earn large amounts when their business performs well, or small amounts when it does not. For example, the owner of an ice-cream shop may earn a lot during the summer months, and less during the winter months.

The amount of income that people earn will depend on a wide range of factors, as shown in Source 3.

wage
an amount of money that an employee is paid based on the work that they provide

profit
the amount of money a business earns after taking away the expenses that it has to pay

Time worked	This includes the number of hours or days worked and when they are worked. For example, employees may be paid more for working late at night, over the weekend or on public holidays.
Nature of work	This refers to how difficult or specialised the work is. For example, surgeons who specialise in a certain field of medicine can earn higher wages for their services.
Qualifications and experience	Jobs often require certain qualifications or experience. People with higher qualifications and more experience may be able to do a job better than someone with less experience. For example, a lawyer who has excellent qualifications and many years of experience winning cases will generally be paid more than a lawyer who has just started their career.
Number of workers available	This refers to how many other people are able and willing to do the same job. For example, teachers and doctors who work in remote locations can often receive additional payments.
Laws and regulations	In every country, there are laws about the minimum amount that workers must be paid. For example, in Australia in 2020, the minimum wage for an adult was $19.84 per hour, or $753.80 per week. By comparison, in the United States, the federal minimum wage for an adult in 2020 was (in Australian dollars) $9.63 per hour, or $366.41 per week.

Source 3 The amount of income a person earns will depend on several factors.

Quiz me!
A quick quiz on why we work

Other material benefits

In addition to money earned as income, people also receive other material benefits from working, including:

- **superannuation** (Australian employers must make superannuation payments to their employees)
- other financial benefits, such as:
  - bonuses (payments to some employees and business owners if they or their company performs well)
  - allowances such as car expenses and meals if employees are required to travel
  - discounts on goods sold by the company.

superannuation
money paid regularly into a fund that cannot be accessed until retirement

22.1 CHECK YOUR LEARNING

Review and understand

1. **Outline** the difference between material and non-material reasons for working.
2. **Identify** three material and three non-material reasons why people work.

Apply and analyse

3. Refer to Sources 3 and 4 and **explain** why you think surgeons and anaesthetists are the first and second highest paid professionals in Australia.

Source 4 In a 2017 study by the Australian Taxation Office, surgeons and anaesthetists ranked as the first and second highest paid professionals in Australia.

22.2 The changing work environment

In this topic, you will:

» explore how technology and outsourcing have affected the labour market.

labour market
the supply of and demand for labour; also known as the job market

Key skill worksheet
Reasoning & decision making: Pros and cons of working from home

The world around us is changing. Technological advances have created new ways of doing things that most people could not have even imagined in the past. This has changed the way that goods and services are produced, and has affected the **labour market**.

Working from home

Working from home is becoming more common, thanks to improvements in communication technology. People might prefer to work from home for a number of reasons:

- It saves a lot of travel time.
- It allows those with an illness to continue working without needing to travel.
- Many people find they can concentrate better when they are working away from a noisy office environment.
- It gives people more flexibility to work when they want to.
- It allows some working parents to work flexible hours around their children's schooling.
- It enables people to feel safe and helps stops the spread of infectious diseases. This was especially true during the COVID-19 pandemic, when many people around Australia worked from home for several months at a time.

Source 5 During the COVID-19 pandemic, more people – including teachers and students – worked from home.

However, the ability to work from home often depends on the type of work a person is employed to do. For example, a brain surgeon would not be able to operate on their patients from home. They would require access to equipment and the support of other employees such as nurses, anaesthetists and other doctors – not to mention the patient – which they do not have at home.

During the COVID-19 pandemic, more people – including teachers and students – worked from home. A number of economists predict that many in the workforce are unlikely to return to full-time, on-site work in the future.

Artificial intelligence

Artificial intelligence (AI) gives machines and robots the ability to think and act more like humans. Robots with AI have been used in factories and warehouses for many years. Some robots have the ability to do highly professional tasks, such as analysing data, generating reports, and even diagnosing patients. While using robots has the potential to improve our **living standards** and create new industries, a study by the McKinsey Global Institute for business and economics research predicted that, by 2025, robots could jeopardise between 40 million and 75 million jobs worldwide.

Some people argue that the increasing use of technology will put people out of work in the future. However, others believe that technology will improve our **work–life balance**, giving us more time to relax or socialise as a result of technology making our jobs quicker and easier.

Source 6 Google has successfully designed a self-driving car. The car uses sensors and software to detect objects – such as pedestrians, cyclists and vehicles – and to safely drive around them.

living standards
the level of wealth, material goods and comfort available to people

work–life balance
the relationship between a person's work and lifestyle, and the impact they have on each other

See, think, wonder

Look at Source 6.

- What do you see?
- What do you think?
- What do you wonder?

Outsourcing

For decades, Australian businesses have **outsourced** part of their operations to nations where labour is cheaper than it is in Australia. This reduces costs and helps the businesses compete with the cheaper products of international **competitors**. In the past, Australian businesses have mainly outsourced manual labour overseas to take advantage of the lower wages paid to unskilled workers in **developing countries**. However, in recent years, advances in communication technology have allowed for the outsourcing of more technical jobs, such as those in information technology. With more people from developing countries gaining access to education and the internet, some predict the outsourcing of many more jobs in the future.

However, outsourcing does not only give work to people overseas. Australian businesses can also benefit by outsourcing work to other local businesses. For example, a business might outsource its **marketing** or advertising to a local marketing company. This might be because the business does not have the resources to hire an employee to supply this skill or service, or because it is cheaper for the business to outsource the work than to employ someone. This is often the case for businesses that need a one-off job completed and do not want to hire a staff member to complete one task.

outsourced
to have obtained goods and services from outside suppliers to reduce costs

competitors
rival businesses that make products in the same market

developing country
a less economically developed country that has some difficulties in supporting the needs of its people

marketing
promoting the buying or selling of products

22.2 CHECK YOUR LEARNING

Review and understand

1 In your own words, **define** 'competitors'.

Apply and analyse

2 **Explain** the meaning of 'artificial intelligence'.

3 Look at Source 6. **Determine** (decide) what sort of jobs you think would be under threat from self-driving cars.

Evaluate and create

4 **Evaluate** the advantages and disadvantages for a business using robots. Be sure to give your overall opinion.

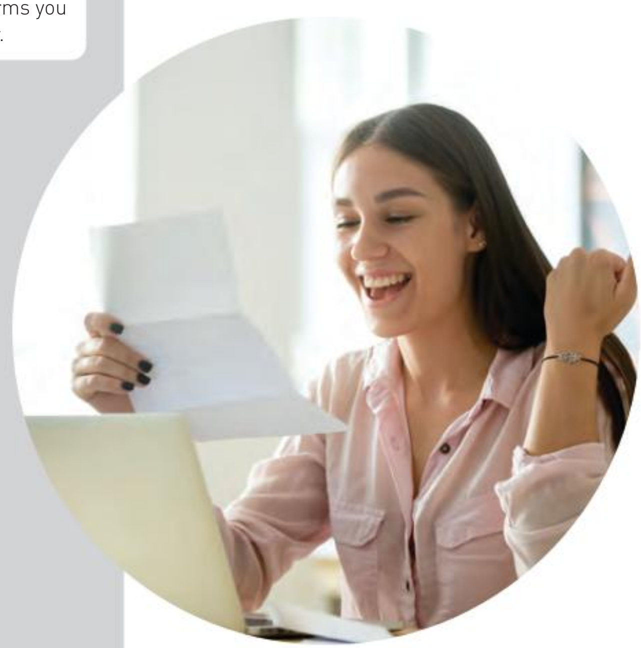
5 **Discuss** the idea that technology will improve our working lives in the future. Do you agree or disagree? Create a presentation that argues for or against this idea.

22A RICH TASK

Quizlet
Revise the key terms you have learnt so far.

Career goals

Setting goals is an important step in making the most of your talents and achieving what you want in life. As you learnt in Chapter 21 on page 430, a goal-setting technique commonly used by both individuals and businesses is the SMART goal principle. Writing a SMART goal can also be useful when seeking to achieve a career goal or get that dream job.



Source 7 Setting career goals helps people to aim high and achieve their potential.

In this chapter so far, you have learnt about why people work. Setting career goals can be a very fulfilling process and often is what keeps people in a job. Examples of career goals include:

- gaining a new skill
- starting your own business
- improving your sales record
- completing further study at university
- making a career switch
- becoming an expert in a field.

Not only does setting a goal give people a vision of what they would like to achieve in the long term, but also it motivates them in the short term. Goal-setting allows people to focus on what they would like to achieve, and assists them with organising their time and resources to best achieve that goal.

Source 8 What career goals will you set?

KEY SKILL
Asking questions & conducting research

Setting SMART career goals

One way of getting into the career that you want is to set career goals. These goals are the steps that you take to get the career that you want.

The SMART goal technique can help you think about the steps you need to take.

Setting SMART career goals involves conducting research about the kind of career you are interested in, and asking questions of yourself and others about how your goals can be achieved.

Follow these steps to set SMART career goals.

Step 1 Brainstorm some careers that you are interested in. Select one career that you will set SMART goals for.

Step 2 Recap the SMART goal principle. Here is what you learnt in Chapter 21:

S	Specific – the goal is clear and easy to understand. It states exactly what will be achieved and when.
M	Measurable – the goal is measurable in dollars, time, quantity, etc.
A	Achievable – the goal is challenging, but it can be reached.
R	Relevant – the goal is something that the individual or business should be aiming to achieve.
T	Time-bound – there is a realistic time frame within which the goal should be achieved.

Source 9 The SMART goal principle

Step 3 Write down a career goal, using the SMART goal acronym. If there are any questions or parts of the acronym you cannot answer, leave these parts blank.

- *Specific* – the goal should say exactly what will be achieved and by when. To help you make the goal specific, consider the 'W' questions of the goal: 'who' ('who is involved?'), 'what', 'where' ('where will this goal be achieved?'), 'when' and 'why' ('why do you want to achieve this goal?')
- *Measurable* – the goal should be able to be measured as a number (for example, in a quantity, in time or in dollars). To help you make your goal measurable, consider how you will know if you have reached your goal.
- *Achievable* – the goal should be challenging, but able to be achieved. To help make your goal achievable, consider if other people you know have achieved similar goals, or if you have everything you need to be able to achieve your goal.
- *Relevant* – the goal should be something that is relevant to your life. To help you make your goal relevant, consider why it is important to you and how achieving the goal will help you.
- *Time-bound* – the goal should have a target date. Consider a deadline or time frame for your goal to help you make the goal time-bound.

Step 4 Research the answers to any questions or parts of the acronym that you could not answer, or that you need more information on. For example, you may want to research how other people who have achieved your career goal managed this. You can use sources such as the internet, or people you know.

For more information on this key skill, refer to page 421 of 'The economics and business toolkit'.

Practise the skill

1. Use the above steps to set one short-term and one long-term SMART career goal.
2. **Summarise** your SMART goals in 100 words, including how you will start working towards achieving these goals.

Extend your understanding

1. You can use the SMART goal principle at school to help achieve both personal and academic goals. Choose a subject you would like to improve in by the end of the term, and **create** an academic goal for yourself, using the SMART goal principle. You can share your goal with a parent, caregiver, grandparent or teacher, so that they can check in with you from time to time. It is always great to have someone motivate you towards a goal!

22.3 Workers of the world

In this topic, you will:

» explore the impacts of outsourcing labour in the global economy.

The nature of work varies greatly from country to country. On page 445, we looked at how businesses often outsource parts of their operations to developing countries. They do this to reduce their production costs and make greater profits. However, this raises questions about whether it is ethical to make a profit by using workers in developing countries, who are paid very low wages, who work in poor conditions, and who have very few regulations protecting their rights.

Sweatshops

A sweatshop is a factory in which the workers earn very low wages and work in poor conditions. The workers are regularly abused and forced to work incredibly long hours in unsafe environments. Sweatshops are common in developing countries where the laws that protect workers are not enforced. Many well-known businesses use sweatshops to produce products such as clothing, cotton, bricks, cocoa and coffee.

developed country
a country with a well-developed economy and a relatively high standard of living that is able to support the needs of its citizens

ethical consumers
people who make an effort to purchase goods and services that do not have a negative impact on other people, animals or the environment

Child labour

There are an estimated 152 million children around the world who are forced to work. They are often abused and paid very little for the work they do. Child labour is most commonly used in sweatshops and on plantations in developing countries. These sweatshops often produce goods for famous brands that sell their products in **developed countries**, such as Australia.

Source 1 On 24 April 2013, the Rana Plaza building in Dhaka, Bangladesh, collapsed, killing 1134 people and injuring many more. The building housed several sweatshops, and this horrific event brought attention to the unethical working conditions of those who make the clothes for over 150 international brands.

Solutions

The people who work in sweatshops spend the majority of their pay on food for their families to survive. The child labourers who miss out on an education have no real chance of breaking out of poverty on their own. A study conducted on wages showed that doubling the salary of sweatshop workers would only increase the consumer cost of an item by 1.8 per cent, and that consumers would be willing to pay 15 per cent more to know that a product did not come from a sweatshop.

As consumers, we can do a great deal to help protect workers from unethical businesses. By being **ethical consumers** – who research products before we buy them – we can put pressure on businesses to do the right thing.

Developing questions and researching

The key skills of questioning and researching involve developing queries about events or issues in economics and business, collecting relevant data and evidence from sources, and sorting and summarising information into data or graphic forms, such as graphs and tables.

Practise the skill

Practise questioning and researching by answering this question: 'Do your favourite brands use sweatshops?'

1. **List** your favourite brands.
2. **Research** whether your favourite brands use sweatshops to produce their goods and services.
3. If your favourite brands use sweatshops, **research** the pay and working conditions in those sweatshops.
4. If your favourite brands do not use sweatshops, then well done on being an ethical consumer! **Research** a famous brand that does use sweatshops, including the pay and working conditions in those sweatshops.
5. **Create** a poster to present your research, and remember to include data or other graphic forms.

For more information on this key skill, refer to page 423 of 'The economics and business toolkit'.

KEY SKILL
Asking questions & conducting research

Watch it!
A video and quiz on economic inequality

Source 2 A child wipes the soot from his face while collecting wood for charcoal production in the Philippines.

See, think, wonder

Look at Source 2.

- What do you see?
- What do you think?
- What do you wonder?

22.3 CHECK YOUR LEARNING

Review and understand

1. In your own words, **define** 'sweatshop'.
2. **Outline** what it means to be an ethical consumer.

Apply and analyse

3. **Examine** (look closely at) Source 1.
   a. **Explain** whether you would buy products from a business that you knew was exploiting workers in unsafe factories.
   b. Brainstorm how you could find out more about the products you are purchasing.
4. In pairs, **discuss** how the information in this topic has changed the way you will think about shopping in the future.

22.4 Workers in Australia

In this topic, you will:

» understand the influences on the way people in Australia work.

Workers in Australia have far better working conditions than workers in most other nations around the world. This is largely because Australia's healthy **economy** produces enough jobs to employ the majority of people. It is also due to the laws and agreements in Australia that protect the rights of workers. In many cases, these laws were introduced after campaigns by **workers' unions**.

Unemployment

One of the main goals of the Australian Government is to create enough jobs for its citizens. The government does this by managing the economy in such a way that businesses have the potential to grow. This might include giving money or tax breaks to businesses that hire more workers to help them produce and sell more products. The goal of the government is to create jobs for around 95 per cent of people who are able and willing to work. This is known as full **employment**.

Workers' unions

Workers and their employers have had many disputes over the years. This is because businesses are usually mainly concerned with making as much profit as possible, which sometimes means paying their workers as little as possible. This is why workers' unions are so important. The roles of workers' unions include meeting with employers to negotiate better terms of employment, and holding **strikes** or other protests when negotiations fail.

economy
a system that involves the production, distribution, trade and consumption of goods and services by individuals, businesses, organisations or governments

workers' unions
organised associations of workers that are formed to protect and further the workers' rights, interests and working conditions

employment
having a job that returns an income for the work provided

strike
a refusal to work as a form of protest until something is done to address the workers' concerns

Source 3 Members of unions, such as the Australian Rail Tram and Bus Industry Union, will at times strike to draw attention to their cause.

Laws affecting Australian workplaces

There are many laws that affect Australian workplaces. These laws relate to things such as:

- *occupational health and safety* – businesses are required by law to ensure that their workplaces are safe at all times
- *the minimum wage* – although the government does not set the exact amount that workers must be paid for their work, it does set a minimum wage; it is illegal for employers to pay below the minimum wage (see page 444)
- *discrimination* – there are strict laws to ensure that people are treated equally. This means that it is illegal for a business to mistreat someone because of their race, beliefs, disability, gender or other personal circumstances that do not affect the way they do their job.

Source 4 Under occupational health and safety laws, a business must do everything in its power to prevent workplace accidents from happening. This includes providing employees with safety equipment and training them to perform tasks safely.

The impact of COVID-19 on the workforce

Despite government policies and laws on employment, events from outside Australia can have an enormous impact on the workforce. A recent example of this is the COVID-19 pandemic that began to sweep across the world in 2020.

The pandemic led to the closure of national and often state borders, which meant that people could not travel. Therefore, many jobs were lost in the tourism and hospitality sectors. As well, state governments imposed 'lockdown' restrictions during outbreaks of the disease, which meant that many 'non-essential' businesses lost a great deal of trade, and many workers either lost their jobs or worked reduced hours.

Quiz me!
A quick quiz on workers in Australia

22.4 CHECK YOUR LEARNING

Review and understand

1 **Describe** the role of workers' unions.
2 Look at Source 4. **Outline** why it is important for businesses to provide safety equipment on worksites.

Apply and analyse

3 **Summarise** the aim of the Australian Government in terms of employment.
4 Look at Source 3. **Explain** what a strike is and how can it help workers improve their working conditions.

Evaluate and create

5 Explore your school and take note of any potential safety hazards that could harm staff, students or visitors. **Propose** (put forward) suggestions for how these can be made safe, and report back to your teacher with your findings.
6 What lockdown restrictions did your state government impose during the COVID-19 pandemic? In small groups, **discuss** the pros and cons of these restrictions for the workforce.

I used to think, now I think

Reflect on your learning about conditions for Australian workers and complete the following sentences.

- I used to think ...
- Now I think ...

What has changed in your understanding?

22B RICH TASK

Quizlet

Revise the key terms you have learnt so far.

Minimum wages

Working Australians enjoy high living standards compared to many people around the world. Part of this is because minimum wage laws ensure that we all get a fair share of the profits if we work for an employer.

The minimum wage is the legal standard for how much people must be paid, and employers cannot pay their workers less than this amount. A minimum wage prevents workers from being taken advantage of and falling into poverty, even when they are working.

However, because businesses can outsource work to other countries, some economists argue that the minimum wage in Australia is too high and that a lower minimum wage is needed to keep jobs in Australia. These economists believe that businesses that cannot afford to pay Australia's minimum wage will either close down or move overseas, meaning fewer jobs for Australians who need employment.

Other people argue that lowering the minimum wage does nothing but cause competition between workers around the world to see who will settle for the lowest wages. Would Australians be willing to work for less than a dollar an hour, as is the case in many other nations? They argue that business owners already make substantially more than the workers who perform the actual tasks of the business, and should be required to pay workers their fair share.

Source 5 Protesters hold signs at a union rally in Melbourne in 2018. The protesters were demanding better working conditions and higher pay.

KEY SKILL
Analysing sources

Analysing economic data from a bar graph

Economists need to be able to analyse economic data from graphs to answer questions about the information presented in them.

To analyse the bar graph in Source 6, follow these steps:

Step 1 Read the 'Practise the skill' questions. This will help you know what to look for in the graph and have a better understanding of the purpose of the task.

Step 2 Read the caption for the graph and the labels on each axis. This will give you an understanding of what the graph is measuring.

Step 3 Find the relationship. The point of placing data in a bar graph is to visually compare values – in this case, the minimum wages for different countries.

Step 4 Identify points of interest. Are there any values that stand out as being much bigger or smaller than the other values? If so, what might be the reasons for this?

Step 5 Answer the questions.

For more information on this key skill, see page 424 of 'The economics and business toolkit'.

Practise the skill

Apply the first four steps above to answer the following questions about the bar graph shown in Source 6.

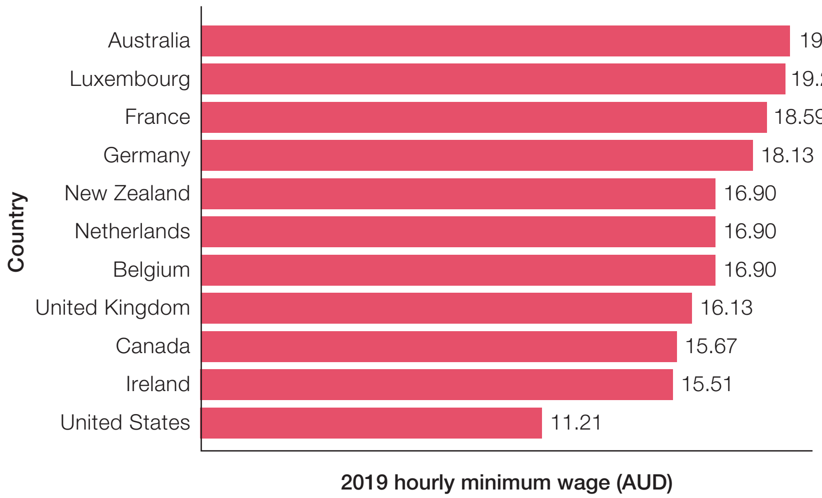
1 **Identify** the country that has the highest minimum wage.

2 What is New Zealand's minimum wage?

3 **Identify** the country that has the lowest minimum wage.

4 From the information in this graph, which country would you most like to live in? **Explain** your answer.

5 Do you think that Australia should lower its minimum wage, or try to help other countries raise theirs? **Justify** (give reasons for) your answer.



Source: https://stats.oecd.org

Source 6 The hourly minimum wage (shown in Australian dollars) in a selection of countries, 2019

Extend your understanding

1 Some people argue that there needs to be a 'maximum wage' to promote equality in our society. **Research** the idea of a 'maximum wage' and write a paragraph explaining why you think this would be a good or bad idea.

22 CHAPTER REVIEW

Review questions

22A How will the way we work affect our lives in the future?

1. **List** three material reasons for working. (3 marks)
2. Define 'work–life balance' and explain why you think it is important. (3 marks)
3. **Propose** (put forward) two factors that contribute to the amount of income a person earns. (4 marks)

(Total: 10 marks)

22B How and why are workplaces different around the world?

1. **Identify** three areas of law that affect Australian workplaces. (3 marks)
2. **Explain** one way in which the Australian workforce changed during the COVID-19 pandemic. (1 mark)
3. **Discuss** whether you think it would be better if there were no laws that protected the safety of workers in Australia. Why or why not? Remember, the best discussions always consider different points of view. (6 marks)

(Total: 10 marks)

Source 7 Many tasks that used to be performed by people are now performed by machines, which are more precise and efficient than people.

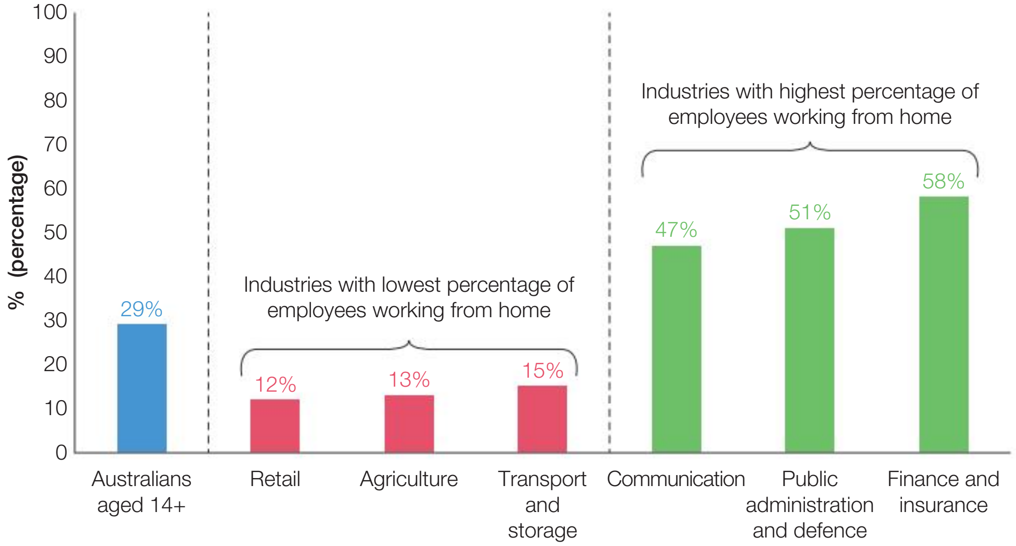
Review activity

Read the information and study the graph, then answer the questions that follow.

Working from home during the COVID-19 pandemic

In 2020, the number of Australians working from home rose significantly, due to the COVID-19 pandemic. Working from home helped to stop the spread of the virus, and allowed many to continue working while feeling safe from infection. In addition to pre-existing apps and software, businesses took advantage of newer technology – such as Microsoft Teams and Zoom – to hold meetings and keep in touch with workers remotely.

The World Economic Forum released the data in Source 8 in December 2020 to show the Australian industries with the most and least numbers of employees working from home.



Source 8 The industries in Australia with the most and least number of employees working from home in 2020

1. What percentage of workers worked from home in the industry with the least number of 'working from home' employees? (1 mark)
2. **Identify** the three industries that had the highest percentage of employees who worked from home. (3 marks)
3. **Describe** two reasons why there was a rise in the number of employees who worked from home in 2020. (4 marks)
4. **Propose** why transport and storage industries had the lowest percentage of workers working from home. (6 marks)
5. Use the information in the graph to write a paragraph that **explains** the working-from-home trends in Australia during the COVID-19 pandemic. (6 marks)

(Total: 20 marks)

Check your Student obook pro for these digital resources and more:

Student book questions
Chapter 22

Key skill worksheet
Communicating & reflecting: Chapter 22

Quizlet
Play a game of Quizlet on The world of work.

Chapter review quiz
Chapter 22


19.07.2016
REBECCA MAHER
Same Story
Eric Garner
David Dungay
Different Soil
OSAKA

4

PART 4

Civics and citizenship

Skills

Chapter 23 The civics and citizenship toolkit 460

Government and democracy

Chapter 24 Democracy in Australia 468

Laws and citizens

Chapter 25 Justice and the law 484

CHAPTER 23

The civics and citizenship toolkit

Civics and citizenship is the study of the rights and responsibilities that Australians have in society, and the study of how our government works. It looks at how we, as individuals, can participate in our democracy and help shape our nation into one that is fair and just for all members of society. As a student of civics and citizenship, you will gain the knowledge and skills that allow you to question, understand and contribute to the world in which you live.

Civics and citizenship teaches us that as we learn to form our own opinions, we accept that other people have different views. To form our own opinions, we must first gather information from a wide range of sources about various issues before we come to our own conclusions.

As informed, tolerant and responsible citizens, we can be active members of society and promote the values of freedom, respect, compassion and equality that characterise us as Australians.

Source 1 Situated in Canberra, Parliament House is where important decisions are debated and made by our democratically elected politicians.

23A
What are the civics and citizenship skills?

23.1 Civics and citizenship skills

Active citizens learn to ask questions, conduct research, analyse information, and argue their point of view. For civics and citizenship students, the classroom is a place where you learn to share your opinions and see things from different perspectives. You should take this approach when examining the democratic system of Australia, as well as the legal rights and responsibilities of its citizens.

Studying civics and citizenship requires you to analyse information and ask a range of questions to find out more about a topic. You will learn to ask 'what', 'why', 'when', 'how' and 'who' to uncover the truth about an issue. Through investigating an issue, you will be able to develop your own point of view, while understanding the reasons why others have different opinions.

As shown in Source 1, there are four key skills active citizens use when investigating civics and citizenship issues. These skills are:

1. Asking questions and conducting research
2. Analysing sources
3. Evaluating and decision making
4. Communicating and reflecting.

Source 1 There are four key skills used when studying civics and citizenship. Each of these skills is like a tool in a toolkit.

23.2 Asking questions and conducting research

Developing questions

As a civics and citizenship student, you should ask a lot of questions, and always consider why someone has a certain point of view or why they act in a certain way. Read a wide variety of sources, listen to people with different points of view, and then carefully consider the arguments for and against a certain issue before reaching your own conclusions.

You should conduct research to become as informed as possible about a topic, to check facts and find evidence – such as statistics, cases from the past, and quotes from what others have said. When you have formed your own opinion, you should be able to back up your viewpoint with supporting evidence and sound reasoning.

Source 2 Conduct research to become as informed as possible about a topic.

Gathering information

Sources provide information for civics and citizenship students. Examples of sources include case transcripts and judgments, newspaper articles, letters, tweets, blogs and Facebook posts, cartoons and interviews.

Being able to locate a range of relevant, reliable sources is a valuable skill, which usually involves a number of different research methods, such as:

- using online search engines, such as Google
- following social media, such as Facebook and Twitter
- reading newspaper and magazine articles in print or online
- contacting local members of parliament or asking people who are experts in the subject area
- speaking with other students or family members.

Using ICT to locate relevant sources

Although books and newspapers are valuable sources of information, most research today is conducted online. The following guidelines will help you to ensure that the online sources you are using are accurate, reliable and relevant:

Source 3 Use reliable online sources you can trust to find information to support your point of view.

USE SEARCH ENGINES

Search engines such as Google are useful research tools, but much of the material in search results will be unreliable and inaccurate. When using search engines, be sure to define your search using specific keywords. Ask your librarian or teacher for help with this.

UNDERSTAND WEBSITE DOMAINS

Information from the websites of educational institutions (such as universities) is likely to be reliable and accurate. Other reliable sites are those linked to government departments and reputable companies. A quick way of telling if a site is linked to an educational institution or a government department is to look at the suffix of the domain name, which is part of the URL (internet address) – government websites have '.gov' at the end of the URL, and educational institutions have '.edu'.

AVOID UNRELIABLE SOURCES

Avoid blogs or social media posts created by unknown individuals. If you find information relevant to your investigation on a blog or social media site, always verify it by using a more reliable source.

AVOID PLAGIARISM

Never cut and paste online information without referencing where it is from. Taking someone else's work, ideas or words and using them as if they are your own is called plagiarism and is against school rules, while copying and pasting anything from a website without the website owner's permission is against the law.

Check your learning
Log onto your obook pro to complete the questions for topic 23.2.

For more on the skill of asking questions and conducting research, see the key skill box in Rich task 25A (page 489).

23.3 Analysing sources

Analysing information

A useful source is one that adds to your understanding of a civics and citizenship issue. The source needs to be relevant to the topic and it must also be reliable. The following are good questions to ask when determining whether a source is useful:

- Is it a reliable source?
- Is there enough information and sufficient detail to help me answer the inquiry question?
- Does the information support evidence from other sources?
- Is it balanced? Or does it present one point of view (that is, is it biased)?
- Is it based on fact or opinion?
- Is the information current?

Separating fact from opinion

When analysing a source to decide whether it is relevant and reliable, you first need to determine whether the source is fact or opinion.

- A *fact* is something that can be proved: when an event took place, what happened and who was involved.
- An *opinion* is based on what a person may believe to be true.

A simple way to detect whether a statement is fact or opinion is to look closely at the language used. The use of words such as 'might', 'could' and 'think' all indicate that an opinion is being expressed.

Below is an example of fact versus opinion on the issue of raising Australia's age of criminal responsibility.

Source 4 An example of fact versus opinion

Raising Australia's age of criminal responsibility	
Fact	Australia's age of criminal responsibility is 10 years old. This is one of the youngest ages of criminal responsibility among similar democratic nations. The United Nations Committee on the Rights of the Child recommends that the age of criminal responsibility be 14 years old.
Opinion	The age of criminal responsibility in Australia is too low and is unfair. It must be raised to ensure that justice is served.

Check your learning
Log onto your obook pro to complete the questions for topic 23.3.

Source 5 The Raise the Age campaign advocates to raise the age of criminal responsibility in Australia.

23.4 Evaluating and decision making

Recognising different points of view

In civics and citizenship, it is important to understand not only what opinion is being expressed, but also why it is being expressed. It is useful to consider why a person may have a certain point of view. For example, the family of a victim of crime may say to the media that a sentence given to a criminal was insufficient and unjust. This may be so, but it is important to think about how the opinion of family members might be influenced by the emotions of losing a loved one. Listening to and being respectful of opinions that may be different to our own is an important skill to learn in civics and citizenship.

Source 6 A democratic process involves everyone having the opportunity to have their say and have their vote counted.

Using democratic processes to agree on a course of action

A democratic process exists when everyone has an opportunity to have their say. This can include giving all the members of a group the opportunity to contribute to a discussion and communicate their opinion. Often in a democratic system, it is also useful to make sure that all the members of a group have access to any relevant information regarding the discussion or issue.

Once every group member has had their say, the group may conduct a vote. Once the vote has been completed and all the members of the group have reached an agreed outcome, a plan can be developed that will be used for that action or issue.

For more on the skill of evaluating and decision making, see the key skill box in Rich task 24A (page 474) and Rich task 25B (page 499).

Check your learning
Log onto your obook pro to complete the questions for topic 23.4.

23.5 Communicating and reflecting

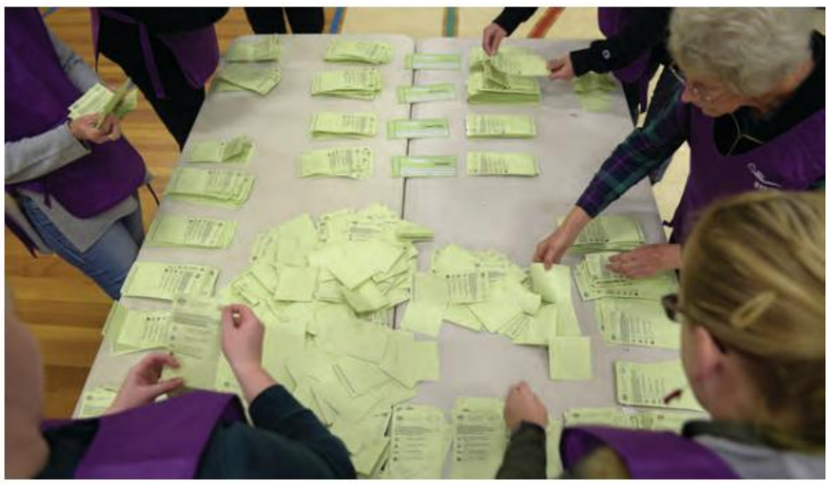
Source 7 Terms commonly used in civics and citizenship

Term	Definition
Citizen	a person who legally lives in a geographical area, such as a town or country
Citizenship	a person's status as a citizen; in a wider context, citizenship encompasses citizens' rights and responsibilities
Civics	the study of the rights and responsibilities of citizens and how government works
Democracy	a system of government where each citizen has an equal right to influence the political decisions that affect their society
Government	the elected members of parliament who make decisions for a nation or state; the government is made up of the party or coalition that has won a majority of seats in the lower house of parliament
Multiculturalism	the idea that people of many different cultures, races and religions can live peacefully with one another as equals
Parliament	the organisation that makes the laws in a country, often with a lower house to draft laws and an upper house to review the proposed laws; in Australia, the Queen's representative (the governor-general) is also part of parliament and officially creates the laws
Representative democracy	a system of government in which the people elect members of parliament to make laws and manage the country on their behalf

Quizlet
Become familiar with civics and citizenship terms by reviewing them on Quizlet.

Check your learning
Log onto your obook pro to complete the questions for topic 23.5.

In every subject, a common language is used. Source 7 lists and defines some commonly used terms in civics and citizenship. Additional civics and citizenship terms are listed in the glossary at the end of this book, and are also defined throughout the chapters. If you come across a term that you are unsure of, you should use a dictionary, search for the term online, or ask your teacher to help you understand what it means. It is a good idea to keep your own glossary of subject-specific terms, adding any new words that you come across.



Source 8 Counting votes in an Australian election – in a representative democracy, citizens vote for representatives to make laws in parliament.

Reflecting on your role as a citizen

Living in a democratic society means that Australian citizens have many rights and responsibilities. We have a right to live freely in a society where we also allow others to live freely.

As individuals, we should always think about what we can do to make the world a better place. This goes above and beyond simply obeying the law – it is a higher level of social consciousness that helps us improve our world through the positive changes we make to it. Australian citizens are global citizens, and we understand that the decisions we make can affect the whole world and its inhabitants.

For more on the skill of communicating and reflecting, see the key skill box in Rich task 24B (page 481).

CHAPTER 24

Democracy in Australia

Australia is a democracy. In a democracy, each citizen has an equal right to influence the political decisions that affect their society. This means that each person may express their opinions to help decide how their society is governed.

In a nation of over 25 million people, making sure everyone is heard can be quite difficult. For this reason, Australia has a voting system that allows us to elect politicians or political parties to represent us at local, state and national levels. This system of government, as well as our freedoms and responsibilities as citizens, is what defines democracy in Australia.

Source 1 Voters at a polling booth in the 2019 federal election; Australia has a representative democracy in which people vote for the political party or politician that best reflects their opinions on most political issues.

24A

How is Australia's system of democratic government shaped by the Constitution?

24B

What are the freedoms and responsibilities of citizens in Australia's democracy?

24.1 The Australian Constitution

In this topic, you will:

» examine how the power to govern in Australia is divided into three separate branches.

The **Australian Constitution** came into effect on 1 January 1901. At this point, the six British colonies of Australia united – or federated – to form one nation and became Australia's states. The Constitution established the democratic **government** of the **Commonwealth** of Australia and outlined its powers to make **laws**.

The Australian Constitution is divided into eight chapters and more than 100 sections. It is considered by many to be the 'birth certificate' of our nation.

Australian Constitution
a written set of rules and principles that guide the way Australia is governed

government
the elected members of parliament who make decisions for a nation or state

Commonwealth
the federated states and territories of Australia

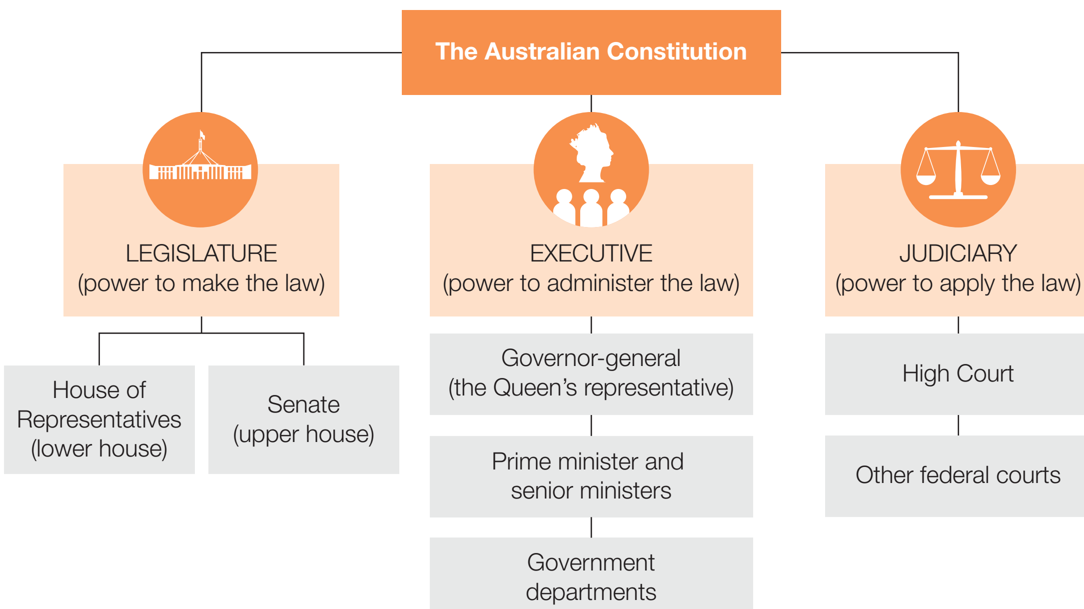
laws
formal rules that govern the way people behave

The separation of powers

The first three chapters of the Australian Constitution define the separate powers of the three main branches of government:

- *legislature* (which has the power to make the law)
- *executive* (which has the power to administer the law)
- *judiciary* (which has the power to apply the law).

These three branches of government are independent of each other, which means that one cannot influence the other, and the power to govern does not solely lie with one person or group. This is called the principle of the separation of powers.



Source 1 The separation of powers at a federal level is set out in the Australian Constitution.

Quiz me!
A quick quiz on the Australian Constitution

Legislature

The legislature is responsible for creating the law. At the **federal** level, the legislature is made up of two houses of parliament: the Senate (the upper house) and the House of Representatives (the lower house). For a new law to be created, it must be debated and then must pass with a majority of votes through both the Senate and the House of Representatives.

federal
relating to the central government of the Commonwealth of Australia

The lower house

The House of Representatives is made up of 151 members of parliament (MPs), each representing one of Australia's federal **electorates**. Their role is to represent the views of Australian citizens and to make and scrutinise laws based on these views. Most proposed laws, called **bills**, are introduced into **parliament** in the House of Representatives.

The upper house

The Senate is made up of 76 senators who represent the states and territories. It shares the role of making laws with the House of Representatives and reviews laws before they are made. The Senate can approve bills proposed by the lower house, with or without changes; and it can also reject them.

electorate
a geographical area containing a specified number of people who can vote in an election

bill
a proposed law that has not been passed by both houses of parliament

parliament
the organisation that makes the laws in a country

prime minister
the leader of the party that forms the government

Executive

The executive is responsible for approving laws and putting them into action. At the federal level, it is made up of the governor-general (who is the Queen's representative in Australia), the **prime minister**, senior ministers and government departments.

The prime minister chooses the ministers, who are commissioned by the governor-general to be part of the executive and implement that law. For example, the prime minister will select an MP to be the Minister for Defence. This minister will be responsible for all matters relating to the military and the naval and air forces, and will be in charge of the Department of Defence.

Judiciary

The role of the judiciary is to apply, or make rulings or judgments about, the law. It is made up of the High Court and other federal courts. These courts interpret the laws passed by parliament and apply them to specific cases and disputes.

In Australia there are three main federal courts where laws can be enforced:

- *High Court of Australia* (the highest court in Australia, and the only court that can hear disputes relating to the Australian Constitution)
- *Federal Court of Australia* (which hears cases on a variety of things, including bankruptcy, tax and trade)
- *Federal Circuit and Family Court of Australia* (which hears all family disputes and a range of other types of matters, including fair work, human rights, consumer law and migration disputes).

Source 2 The High Court of Australia is in Canberra.

24.1 CHECK YOUR LEARNING

Review and understand

1 **Identify** the three branches of government.

Apply and analyse

2 **Explain** what is meant by the 'separation of powers'.
3 Why is it important for Australia to have separation of powers?
4 **Explain** how the way laws are made and applied in Australia demonstrates the idea of separation of powers.

Evaluate and create

5 **Create** an annotated diagram to show how the separation of powers works in Australia. For each branch of government, your diagram must include:
   - pictures of the building and the head(s) of that branch in Australia
   - annotations that explain the role of each branch and the people who make up each branch.

24.2 Changing the Constitution

In this topic, you will:

- examine the process for changing the Australian Constitution
- examine examples of attempts to change the Australian Constitution.

Times have changed a great deal since the Constitution was first written in 1901. For this reason, it is important that the Constitution can be changed. While Australia's system of government – which is called a **representative democracy** – leaves much of the decision making to politicians elected by the people, changes to the Australian Constitution are considered so important that they must also be approved directly by the citizens. This is done by **referendum**.

representative democracy
a system of government in which the people elect members of parliament to make laws and manage the country on their behalf

referendum
a national vote to change the wording of the Australian Constitution

electoral roll
the official list of all those who are entitled to vote in an election

double majority
a majority of states and a majority of citizens; this must be reached for a change to the Constitution to be accepted

Referendums

Before a referendum is held, MPs put together a list of arguments for and against the proposed change to the Constitution. These arguments are called the 'Yes' and 'No' cases, and are posted to every Australian who is eligible to vote. On the day of the referendum all Australian citizens on the **electoral roll** vote 'Yes' or 'No' to the proposed change.

For the change to be accepted, it must be approved by a **double majority**:

- a majority of voters in a majority of states, and
- a majority of voters across the nation.

This is to make sure smaller states are not disadvantaged. Voters living in the territories are only counted in the national majority.

If the proposal is accepted by a double majority, it is given final approval by the governor-general on behalf of the Queen – a formality known as 'royal assent'.

Since Australia became a federation in 1901, 19 referendums have been held, which have proposed 44 changes to the Constitution; but only eight changes have been agreed to.

Source 3 A woman votes in the 1967 referendum – one of the few referendums to have been passed.

Referendums that have been held in Australia include:

- the 1967 referendum, which sought to alter the Constitution to include Aboriginal and Torres Strait Islander peoples and ensure that they were counted in the census – the public voted in favour of this referendum, and it is by far the most popular constitutional change in Australian history
- the 1999 referendum, which sought to change Australia to a **republic** – the public voted against this, meaning that we remained a **constitutional monarchy**.

republic
a system of government in which the power lies with a group of elected officials rather than a king or queen

constitutional monarchy
a system of government in which a country is ruled by a king or queen, whose power is limited by a constitution

Stage 1 The bill
A bill, which sets out the proposed changes to the Constitution, is proposed and passed by parliament.

Stage 2 The committees
Members of the House of Representatives and the Senate are divided into case committees. The majority, who voted for the changes, form a 'Yes' committee, while the minority, who voted against the changes, form a 'No' committee. The two committees organise activities either for or against the changes. If all members vote together in favour of the changes, the 'No' committee is not formed.

Stage 3 The writ
A formal written order, known as a writ, is issued by the governor-general to set the dates for the referendum (including polling day).

Stage 4 The case
The case committees prepare a case for voting 'Yes' or 'No'. These cases are put together with a formal statement of the proposed changes to the Constitution and are printed and sent to every voter in Australia before the referendum.

Stage 5 The vote
On polling day, voters must attend a polling location to vote either 'Yes' or 'No' to the proposed changes. If a double majority is achieved, the changes to the Constitution will be made.

Source 4 The five stages involved in holding a referendum

24.2 CHECK YOUR LEARNING

Review and understand

1 **Define** the term 'referendum'.

2 What is meant by the term 'double majority'?

Apply and analyse

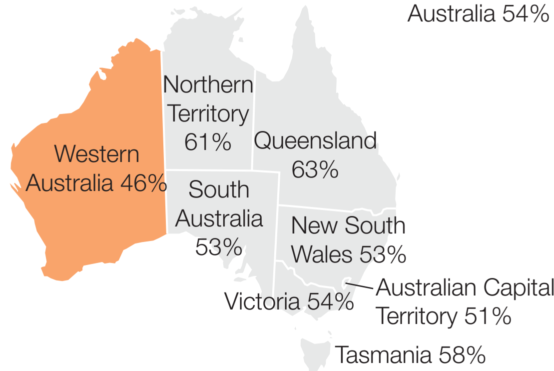
3 **Explain** why people vote in a referendum when they have already elected politicians to represent them.

4 What do you think might happen if a double majority was not required to make changes to the Constitution?

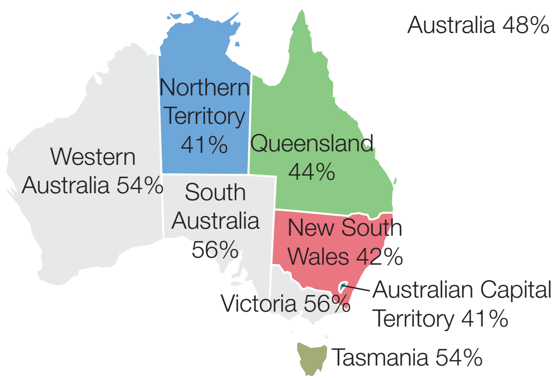
Evaluate and create

5 Some people believe that the Queen is no longer relevant to Australia and that we should become a republic rather than a constitutional monarchy. Conduct research to help you decide whether you believe Australia should remain a constitutional monarchy or become a republic. Get together with some classmates who have the same view as you, and work together to prepare some materials that could be posted out to Australian voters outlining the 'Yes' case (Australians should vote 'Yes' to a republic) or the 'No' case (Australians should vote 'No' and remain a constitutional monarchy).

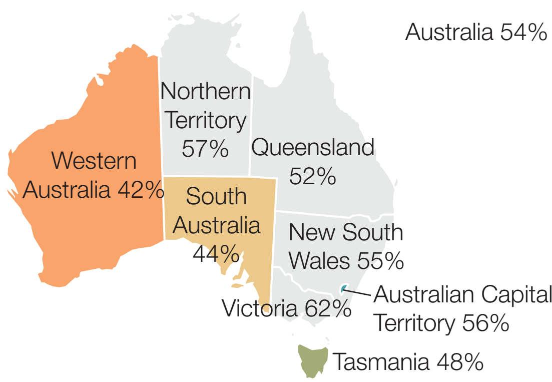
SCENARIO ONE
CHANGE THE CONSTITUTION
✓ Majority of Australian voters
✓ Majority of voters in at least four states



SCENARIO TWO
DON'T CHANGE THE CONSTITUTION
✗ Majority of Australian voters
✓ Majority of voters in at least four states



SCENARIO THREE
DON'T CHANGE THE CONSTITUTION
✓ Majority of Australian voters
✗ Majority of voters in at least four states



Source 5 The Australian Constitution can only be changed with the support of the majority of voters across the nation, and the majority of voters in at least four states. This diagram shows three possible outcomes of a referendum.

24A RICH TASK

Quizlet
Revise the key terms you have learnt so far.

Source 6 The artwork surrounding the *Uluru Statement from the Heart*, shown here, depicts two Creation stories of the Anangu people, who are the traditional custodians of Uluru.

Reforming the Constitution

Approximately every 10 years, the Australian Constitution is officially reviewed at meetings called 'constitutional conventions', where new proposals for changes to its wording are considered.

The most recent review took place in 2017. Thirteen meetings were held across Australia, and a final meeting – called the First Nations National Constitutional Convention – was held at Uluru to consider how the Constitution could better recognise Australia's Aboriginal and Torres Strait Islander peoples.


ULURU STATEMENT FROM THE HEART

Source 7 The *Uluru Statement from the Heart* was issued to the Australian people in May 2017.

At this convention, a document called the *Uluru Statement from the Heart* was drafted, proposing some changes to the Constitution to make it more inclusive of Aboriginal and Torres Strait Islander peoples. One recommendation was the creation of a 'First Nations Voice to Parliament', which would give Aboriginal and Torres Strait Islander peoples input into proposed laws that affect their communities. The statement concluded:

> In 1967 we were counted, in 2017 we seek to be heard. We leave base camp and start our trek across this vast country. We invite you to walk with us in a movement of the Australian people for a better future.

KEY SKILL
Evaluating & decision making

Evaluating Australia's Constitution

A constitution should reflect the values and identity of a nation. The Australian Constitution came into effect on 1 January 1901, when society was very different to what it is today.

When delegates meet at a constitutional convention, part of their task is to evaluate whether the original wording is still relevant or whether it needs to be changed. A good place to start this process is with the preamble, which is a brief paragraph at the beginning of a constitution that states the overall purpose of the constitution.

Source 8 is the preamble to the Australian Constitution. Read it carefully, and follow these steps to evaluate it:

Step 1 What message is being expressed here? (For example, who is considered to be part of this new nation?)

Step 2 Why do you think the writers expressed the message in this way? (For example, what were the values of Australian people in 1901? What do you think the relationship with Britain would have been like then, compared to today?)

Step 3 Do you think the message is still relevant today? (For example, does the preamble reflect what it means to be Australian in the twenty-first century? Why or why not? What is missing?)

Step 4 How do you think the message could be altered to better reflect modern Australian society? (For example, which parts of the message should remain? What needs to be added or removed from the preamble?)

For more information on this key skill, refer to page 466 of 'The civics and citizenship toolkit'.

Whereas the people of New South Wales, Victoria, South Australia, Queensland, and Tasmania, humbly relying on the blessing of Almighty God, have agreed to unite in one indissoluble Federal Commonwealth under the Crown of the United Kingdom of Great Britain and Ireland, and under the Constitution hereby established:

And whereas it is expedient to provide for the admission into the Commonwealth of other Australasian Colonies and possessions of the Queen:

permanent

the monarch of the United Kingdom

as a result of this document

convenient, or having some advantage

Source: Parliament of Australia website

Source 8 A good way to begin is by defining any terms that are unfamiliar to you. An example has been provided here.

Practise the skill

1 In small groups, **discuss** the preamble to Australia's Constitution. Which parts would you like to keep? Which parts would you like to change?

2 In your groups, rewrite the preamble to reflect your evaluation. It can be completely different from the original version, or you could just reword some parts – it is up to you!

3 Conduct a constitutional convention in your classroom. Come back together as a whole class to compare your ideas with each other, and then write a new preamble to the Constitution based on everyone's input.

Extend your understanding

1 Use the weblinks provided on your obook pro to gain a deeper understanding of the *Uluru Statement from the Heart*.

a Read through the whole statement (you can also listen to a recording of the statement being read by Professor Megan Davis at the First Nations National Constitutional Convention).

b **Identify** one brief quote from the statement that has the most powerful impact on you. Why is this message important to you? What point does it make about Australia and its First Nations peoples?

c **Compare** your quote and ideas with a partner.

Key skill worksheet
Evaluating & decision making: Creating a classroom constitution

Weblink
Uluru Statement from the Heart

24.3 The freedoms of Australian citizens

In this topic, you will:

» identify the fundamental freedoms of Australians.

Democratic values are the beliefs and ideals that are held by a democratic society. Such values include respect, equality, fairness and freedom. For example, in Australia (like many democratic nations), freedom is very important. Having certain freedoms (such as those outlined below) is a very important part of living in a democracy. Among other things, they allow us to participate and have a say in the way our country is run.

Australians' fundamental freedoms

To assist in upholding the values of Australia's representative democracy, citizens are granted a number of freedoms. These include five fundamental freedoms:

- *Freedom of speech* allows people to voice their opinions freely, including criticising the government. This ensures that the representatives of the people are aware of the issues that concern their voters.
- *Freedom of association* grants people the right to join groups or organisations without fear of being persecuted for doing so. These groups could include political parties or unions, both of which unite people who are passionate about particular issues that they would like the government to address.
- *Freedom of assembly* allows people to meet in groups for social or political purposes. The ability to assemble and protest freely is an important part of a democracy because it allows us to influence political outcomes.
- *Freedom of religion* means that Australians are free to practise their many different faiths, or to practise no religion at all. Some political parties are formed to represent the views of a particular faith group, such as the Australian Christians.
- *Freedom of movement* enables Australian citizens to travel to all the states and territories in Australia, and to leave and re-enter Australia.

Key skill worksheet
Asking questions & conducting research: Freedom of movement in a pandemic

Source 1 One aspect of freedom of religion is that Australian citizenship may be granted to people of all faiths, without discrimination.

Source 2 The Black Lives Matter protest in Perth in June 2020 is an example of Australians exercising freedom of speech and assembly.

The responsibility of citizens in a democracy

While it is important that citizens in a democracy have certain rights and freedoms, these must be exercised responsibly. This means that we cannot break the law in order to express our freedom of speech, association, assembly, religion or movement. For example, we are allowed to assemble and protest in Australia, but if that protest becomes violent and people get hurt, it is no longer a legal activity.

I used to think, now I think

Reflect on your learning about freedom in Australia and complete the following sentences.
- I used to think ...
- Now I think ...

What has changed in your understanding?

24.3 CHECK YOUR LEARNING

Review and understand

1 **Identify** the five fundamental freedoms that underpin Australia's representative democracy.

Apply and analyse

2 **Explain** why it is important to provide people with fundamental freedoms in a democracy.

3 How would you rank these five fundamental freedoms in order of importance? **Compare** your answer with a classmate. Remember, when you compare things, you must talk about how they are similar and how they are different.

Evaluate and create

4 Consider what would happen if the five fundamental freedoms were provided to people without any laws governing how they were to be exercised. **Justify** (give reasons for) your response.

5 **Create** a poster or infographic to promote the idea of democracy in Australia. Include one of the freedoms discussed here as the focus of your message.

24.4 Active participation

In this topic, you will:

- explore ways that Australians can participate in our democratic political and legal systems
- explain why the participation of citizens is important for a democracy.

For our representative democracy to function properly, it is important that people make their voices heard. By ignoring politics or issues of national importance, people increase the chances of their representatives making political decisions with outcomes that might go against their interests, values or beliefs.

Contact with elected representatives

In a democracy, it is the role of people elected to parliament or to local council to provide a voice for the citizens who voted them into office. They can only do this by having contact with their **constituents** and finding out about the issues that concern them. For example, in 2020, Tasmanian Senator Jacqui Lambie sought the advice of her constituents on how she should vote on a federal government bill that proposed to increase university fees for certain degrees. She spoke with students and academics at the University of Tasmania to help her understand how the bill would affect higher education in the state that she represents. As a result of Lambie's consultation with her constituents, she voted against this bill in the Senate.

In addition, in a democracy it is the role of constituents to contact their elected representatives (by email, phone, through social media, or by arranging a meeting in person) to ensure that they understand the concerns of the people they represent.

constituent
a person living in an area that has elected someone to act as a political representative

Key skill worksheet
Analysing sources: Reaching an informed opinion

Source 3 David Southwick (left), an MP in the Victorian State Parliament, meets two of his constituents to discuss their concerns about changes to cycling lanes proposed by the local council.

Elections

As informed citizens, we can participate in democracy by voting for the people who we think will best represent our opinions and beliefs at local, state and federal levels of government. In fact, Australia's compulsory voting system means that all those who are enrolled to vote must do so or pay a fine. While this might seem unfair, it reflects the idea that voting is not only a right but a responsibility of Australia's citizens.

Direct action

Another way that Australians can participate in our democracy is by raising awareness about issues through **direct action**, which is also known as 'non-violent resistance'. This includes protests (such as marches and demonstrations), boycotts of products and services, and strikes. These methods of direct action have been used in the past to raise awareness and gain attention for many different causes, and to try to influence the decision-making of the people in power (such as our elected representatives).

One of the benefits of direct action is that you do not have to be of voting age to make your voice heard. Direct action has proven to be a very effective way of raising awareness about political issues.

direct action
forms of public protest that seek to raise awareness about issues

Direct action

CASE STUDY

In August 2018, Swedish teen activist Greta Thunberg began missing school on Fridays to go on strike outside Sweden's Parliament to demand more action from her government on climate change. By March 2019, she had inspired a global 'Fridays for Future' movement, with students all over the world skipping school to campaign for greater action by their governments to address climate change. In September 2019, Thunberg delivered a speech at the United Nations headquarters as part of the 2019 Climate Action Summit.

Inspired by Thunberg, an Australian teenager, Jean Hinchliffe, became one of the lead organisers of School Strike for Climate Australia. In September 2019, an estimated 300 000 Australians attended School Strike for Climate rallies nationwide. These were some of the largest protests in our nation's history.

Source 4 School Strike for Climate organisers Jean Hinchliffe (left) and Daisy Jeffrey at a climate rally in Sydney on 20 September 2019

Lobby groups

Another way that Australians can participate in our democracy is by raising awareness about issues through **lobbying**. In Australia, there are two main types of lobby groups (sometimes called 'interest groups'): insider and outsider lobby groups. Insider lobby groups work to achieve change by working with politicians directly; while outsider lobby groups harness community support to pressure the government on particular issues. School Strike for Climate is an example of an outsider lobby group. The Australian Christian Lobby (ACL) is an example of an insider lobby group.

lobbying
making requests to politicians or public groups to try to influence the government to change the law

Key skill worksheet
Communicating & reflecting: Using direct action

24.4 CHECK YOUR LEARNING

Review and understand

1 In your own words, **define** a 'constituent'.
2 **Outline** two ways in which Australians can participate in our democracy.
3 **Identify** three types of direct action.

Apply and analyse

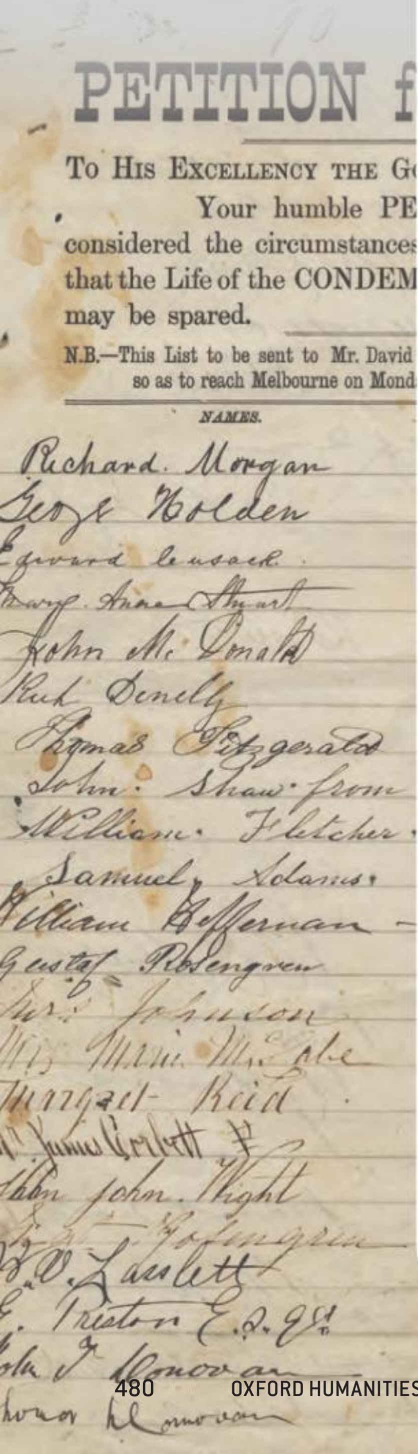
4 **Distinguish between** an insider and an outsider lobby group. Remember, when you distinguish between two things you must talk about how they are different.
5 **Explain** how being an active citizen helps to uphold Australia's representative democracy.

Evaluate and create

6 Greta Thunberg uses direct action, or non-violent resistance. What do you think are the advantages of using direct action to advance a political cause?
7 Use the Australian Electoral Commission's website to identify your local MP in the House of Representatives. Conduct some further research, and then **create** a profile for your local MP that includes:
   - their picture
   - the name of your federal electorate
   - their political party (if they are a member of one)
   - how long they have been an MP
   - the location of their electorate office
   - one issue that they are passionate about.

24B RICH TASK

Quizlet
Revise the key terms you have learnt so far.



Petitions

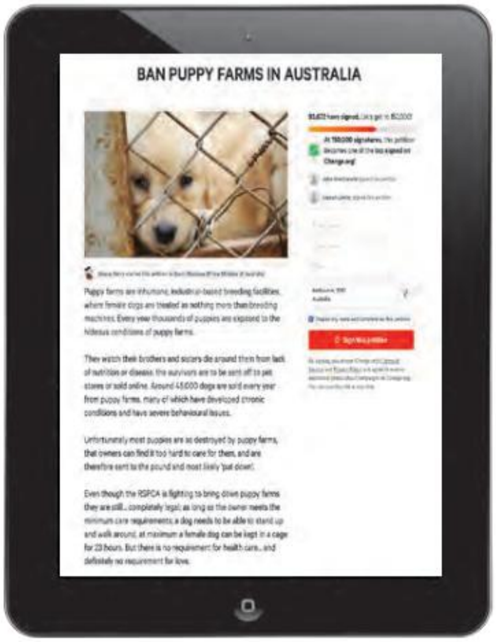
Even if you are not old enough to vote, you can still make your voice heard. One method of direct action that can help raise political awareness is the use of petitions. A petition is a collection of signatures that identify people who share a stance on a particular issue. A petition can be started by anyone.

Petitions have been used for centuries by people who want to show the government that many people support a particular cause. Large numbers of signatures have often persuaded politicians and others to take up the cause of the petitioners. These days, handwritten and online petitions continue to help political causes gain momentum and ensure that politicians are made aware of their constituents' points of view.

In recent years, online petitions have become a popular form of direct action. Websites such as Change.org allow anyone to create a petition and share it via social media or email to as many people as possible. Having petitions online allows people from all over the world to see and sign these documents, which means that online petitions can gain many more signatures than handwritten petitions.

Petitions can also be created via the Parliament of Australia website. Any citizen or resident of Australia can create an e-petition that will then be submitted to the House of Representatives. For example, in 2020, former Prime Minister Kevin Rudd created an e-petition to request that the House of Representatives establish a Royal Commission (an independent investigation, with power to call witnesses) into media ownership in Australia.

Source 5 Labor MP Andrew Leigh shows a printed copy of Kevin Rudd's e-petition on media ownership to the House of Representatives in 2020.



Source 6 Online petitions are an easy way to reach lots of people. This petition about puppy farms led to the Western Australian Government drafting legislation to ban puppy farms.

KEY SKILL
Communicating & reflecting

Creating a petition

Before starting a petition, you must become well informed on the issue at hand. Many people will only sign your petition if you can explain why it is an important cause. This will require you to research the issue in depth, and to explore all sides of the argument.

To create a petition, follow these steps:

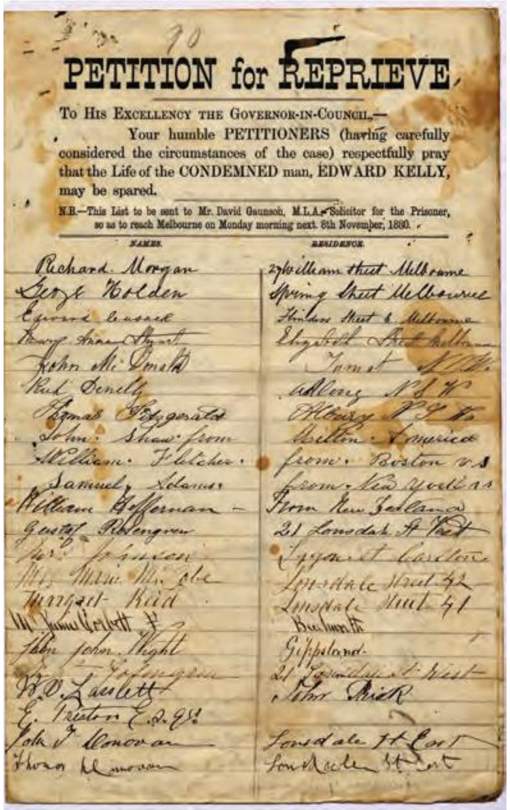
Step 1 Select a title for your petition. The title should be a simple and strong statement explaining exactly what you want to achieve with the petition.

Step 2 Identify who you are petitioning. Is your petition directed at a local politician, the prime minister, the CEO of an organisation, or your school principal? You need to clearly state the title and name of the person whom you wish to receive the petition.

Step 3 Outline the reasons why people should sign the petition. These reasons can be written in bullet points or in a few short paragraphs.

Step 4 Get signatures. These days, a great way of getting signatures is by using social media to gain support for your petition. A traditional way is to approach people whom you believe may be interested in signing the petition. A stand with a sign in a public place is an effective way of drawing people to you. Just make sure that you have the approval of your parents and teacher before you make any decisions about where to look for signatures.

For more information on this key skill, refer to page 467 of 'The civics and citizenship toolkit'.


PETITION for REPRIEVE

To His Excellency the Governor-in-Council,—

Your humble PETITIONERS (having carefully considered the circumstances of the case) respectfully pray that the Life of the CONDEMNED man, EDWARD KELLY, may be spared.

N.B.—This List to be sent to Mr. David Gaunson, M.L.A., Solicitor for the Prisoner, so as to reach Melbourne on Monday morning next, 8th November, 1880.

NAMES. RESIDENCE.

Source 7 Petition for Reprieve for Ned Kelly, 1880

Practise the skill

1 **Identify** an issue that you wish to create a petition for, in order to raise support and awareness for that issue.

2 **Create** a petition using the steps above, and see how many signatures you can get from the students at your school.

Extend your understanding

1 **Research** and write a 200-word report on one of the following historical petitions:
- Yirrkala Bark Petitions, 1963
- Petition for Reprieve for Ned Kelly, 1880
- Bendigo Goldfields Petition, 1853
- Women's Suffrage Petition, 1891 (Victoria).

Weblink
Parliament of Australia; create a petition

24 CHAPTER REVIEW

Review questions

24A How is Australia's system of democratic government shaped by the Constitution?

1 **Identify** the power that each of the three main branches of government (legislature, executive and judiciary) has regarding the law, as set out in the Australian Constitution. (3 marks)

2 Why it is important that Australia's Constitution can be changed? (2 marks)

3 **Outline** the five stages involved in holding a referendum. (5 marks)

(Total: 10 marks)

24B What are the freedoms and responsibilities of citizens in Australia's democracy?

1 **Explain** how direct action can raise awareness of a cause or issue. Include a real-life example in your response. (3 marks)

2 **Explain** why freedoms (for example, freedom of assembly) also come with responsibilities. (3 marks)

3 In Australia, if you are enrolled to vote but do not do so, you must pay a fine. **Suggest** how this encourages people to participate in Australia's democracy. (4 marks)

(Total: 10 marks)

Source 8 Police fire tear gas at pro-democracy protesters in Hong Kong in 2019.

Review activity

Read the information, then answer the following questions.

Freedom of speech in Hong Kong

Not everyone in the world has the right to freedom of speech. In some countries, saying something that insults or contradicts the government is an offence that can be punished severely. There are many countries that censor (suppress) the opinions of their citizens, such as North Korea and China.

Background

Hong Kong was a part of China until the mid-nineteenth century, when it became a British territory. In 1997, it was handed back to China. Since that date, Hong Kong has been classed as a 'special administrative region' of China. This means that the Chinese Government has the ability to exercise power over how the region is run.

However, before Hong Kong was returned to China, Britain and China agreed that although China would resume control of Hong Kong, the Chinese Government would allow Hong Kong to retain a high degree of independence. This meant that Hong Kong was allowed to retain its system of government (which is based on British democracy), and the people of Hong Kong were able to keep their democratic freedoms, such as freedom of speech.

However, in recent years, China has asserted increasing control over Hong Kong. This has resulted in hundreds of thousands of people taking part in pro-democracy protests.

2020 developments in Hong Kong

In June 2020, the Chinese Government passed a new national security law that gave the government significant power over how people in Hong Kong exercised their freedom of speech. Under this law, it is a crime to criticise the Chinese Government, and the maximum penalty for breaking this law is life imprisonment. Since June 2020, many people have been arrested under the national security law.

1. What does freedom of speech allow? (1 mark)
2. **Identify** two countries that censor the opinions of their citizens. (2 marks)
3. **Outline** a similarity between Australia and Hong Kong. (2 marks)
4. **Explain** how freedom of speech in Australia is different from freedom of speech in Hong Kong. (3 marks)
5. **Create** a table that lists the advantages and disadvantages of having complete freedom of speech that is unrestricted by the law. (6 marks)
6. Explain how Hong Kong's system of government differs from Australia's system of government. Do you think Hong Kong is a democracy? **Justify** (give reasons for) your response. (6 marks)

(Total: 20 marks)

Source 9 Hong Kong

Check your Student obook pro for these digital resources and more:

Student book questions
Chapter 24

Key skill worksheet
Communicating & reflecting: Chapter 24

Quizlet
Play a game of Quizlet on Democracy in Australia.

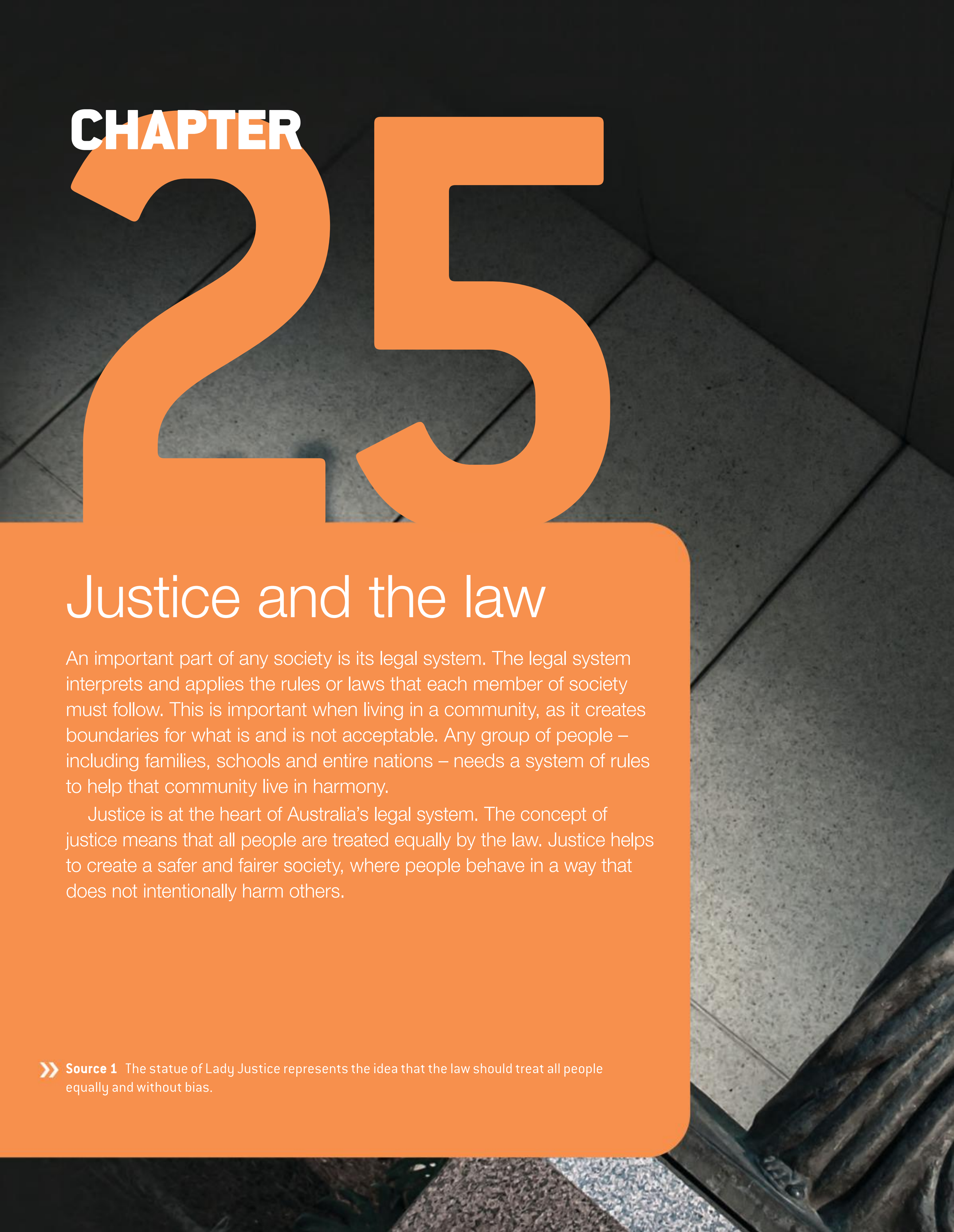
Chapter review quiz
Chapter 24

CHAPTER 25

Justice and the law

An important part of any society is its legal system. The legal system interprets and applies the rules or laws that each member of society must follow. This is important when living in a community, as it creates boundaries for what is and is not acceptable. Any group of people – including families, schools and entire nations – needs a system of rules to help that community live in harmony.

Justice is at the heart of Australia's legal system. The concept of justice means that all people are treated equally by the law. Justice helps to create a safer and fairer society, where people behave in a way that does not intentionally harm others.



Source 1 The statue of Lady Justice represents the idea that the law should treat all people equally and without bias.

25A

How does Australia's legal system protect the individual's right to justice?

25B

How are laws made and applied in Australia?

25.1 Principles of Australia's legal system

In this topic, you will:

» examine the principles that guide Australia's legal system.

Several key ideas, or principles, guide Australia's legal system to ensure that justice is served. They focus on our responsibility as individuals to obey the law, as well as our right to fair treatment within the legal system.

The rule of law

rule of law
the idea that everyone is equal before the law, regardless of their power or status in society

The legal system enforces the laws that are designed to protect our way of life by defining our rights and responsibilities. Everyone must follow these laws. This is known as the **rule of law**. For example, even though he was the prime minister at the time, Malcolm Turnbull was fined $250 for breaking New South Wales maritime laws by not wearing a life jacket while steering his inflatable dinghy in Sydney Harbour in 2017.

Source 1 The right to a fair trial is one of the principles of Australia's legal system. Trials take place in courtrooms around Australia every day.

The right to a fair trial

crime
an act that breaks an existing law, is harmful to an individual or to society as a whole, and is punishable by law

jury
a group of people who are required to decide on a 'guilty' or 'not guilty' verdict for a case

Australia's system of trial is an adversarial system. This means that the trial is a truth-seeking contest between two opposing parties: the prosecution and the defence. A number of characteristics help to ensure that a fair trial takes place:

- A person's race, sex, characteristics or any other factors not related to the **crime** should not affect the outcome of the trial.
- Each party is given an equal chance to present their argument.
- A person's guilt or innocence is determined by an independent and impartial third party – a judge (sometimes with a **jury**) or a magistrate.
- Trials are public. You can visit any court and observe what is happening, except under special circumstances. Allowing the public to observe trials helps ensure transparency.

Source 2 Lawyers, such as barristers, are highly skilled professionals who use their knowledge of the law to advise and represent people.

Quiz me!
A quick quiz on the principles of Australia's legal system

The right to legal representation

Most members of the public have limited knowledge of the law and need help from professionals to understand legal processes. That is why every Australian who is accused of having committed a crime has the right to a legal professional to represent them in court. In addition, a person with hearing disabilities or who does not speak English also has the right to access interpreters or translation services.

Presumption of innocence and burden of proof

The idea that someone is innocent until proven guilty is an important part of any legal system. It means that a person who is accused of a crime (such as murder or assault) is not required to prove their innocence. Instead, the prosecutor must prove that the person is guilty of the crime **beyond reasonable doubt**. This means that the **burden of proof** is on the prosecutor, as they are the one required to prove or disprove the facts in court. In **civil law** cases (such as disputes between people: see page 494), it is up to the person making the complaint to prove that they are right.

The presumption of innocence is considered a human right around the world, and is used as a guiding principle in most democracies. Behind this principle is the idea that it is better to let someone guilty walk free than to imprison someone who is innocent.

beyond reasonable doubt
the standard of proof in a criminal trial; the judge or jury must be satisfied that there is no 'reasonable doubt' before finding an accused guilty

burden of proof
the responsibility for proving the case

civil law
an area of law that defines the rights and responsibilities of individuals, groups and organisations, and regulates private disputes

25.1 CHECK YOUR LEARNING

Review and understand

1 In your own words, **define** 'burden of proof'.
2 **Identify** three characteristics of a fair trial.

Apply and analyse

3 **Explain** why someone might need legal representation, even if they are allowed to represent themselves in court.
4 **Summarise** why the rule of law is important in a democratic system.
5 **Explain** why the burden of proof is on the prosecution and not the defence.

25A RICH TASK

Why is the Magna Carta important to Australia?

Quizlet

Revise the key terms you have learnt so far.

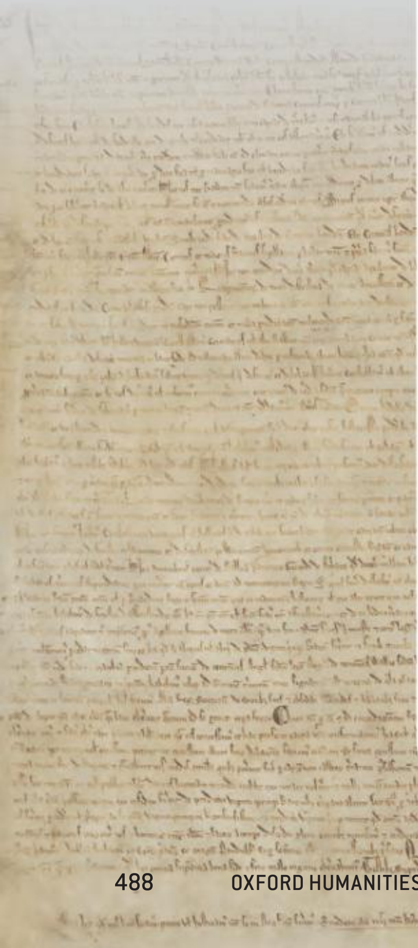
The Magna Carta (meaning 'great charter') is a document that was created in England over 800 years ago. It sets out the fundamental principles upon which many modern democracies are based, including Australia. One of its main features is the idea of the rule of law: that no one – not even the ruler – is above the law.

The Magna Carta was written in response to the actions of King John, who was the King of England from 1199 until his death in 1216 (this is the same King John who appears in stories about Robin Hood). At that time, England was an absolute monarchy, which meant that the king or queen had absolute control and was not restricted by any laws. The barons (wealthy landowners and nobles) were angry because King John had lost land in various military campaigns and because he imposed high taxes on them. They threatened a rebellion unless King John agreed to give them some basic rights, which he did in the Magna Carta, in 1215.

This is how the rule of law is outlined in the Magna Carta:

> No free man shall be seized or imprisoned, or stripped of his rights or possessions, or outlawed or exiled, or deprived of his standing in any other way, nor will we proceed with force against him, or send others to do so, except by the lawful judgment of his equals or by the law of the land.

Source 3 An official copy of the Magna Carta, held by the British Library



Source 4 An engraving of King John signing the Magna Carta in 1215 at Runnymede, England

KEY SKILL
Asking questions & conducting research

Collecting information

When presented with any research question, it is important to break the question down and collect information to be able to answer it. Follow these steps:

Step 1 Make sure you understand the question. Use a highlighter to highlight the key words in the question.

Step 2 Use an issues matrix (see Source 5) to break down the question, focusing on the 'what', 'where', 'when', 'who', 'which', 'how' or 'why'.

Step 3 Create a document to record your findings. Make sure you summarise what you read in your own words, to ensure the final product is your own work. A note-taking template is available on your obook pro to help with this.

Step 4 Research your main question(s), taking notes as you go. When using the internet, it is important to be critical of your sources and to ensure that you only use reliable websites. Websites that contain '.gov' or '.edu' in their URLs are linked to the government or educational institutions, and are a good place to start. Avoid websites that do not state the author or the date that they last updated the information on the site.

For more information on this key skill, refer to page 463 of 'The civics and citizenship toolkit'.

Source 5 An issues matrix

What?	Where?	When?	Who?	Which?	How?	Why?	
							Is ...?
							Did ...?
							Can ...?
							Would ...?
							Will ...?
							Might ...?

Worksheet
Note-taking template

Practise the skill

1 **Apply** the steps above to answer the question: 'Why is the Magna Carta important to Australia?'

2 **Create** a visual summary of the impact of the Magna Carta on Australia by collecting at least three different images or symbols that represent the link between our lives today and the document signed by King John in 1215. Write a short caption under each image explaining why you chose it.

Extend your understanding

1 Use the weblink in your obook pro to access the infographic about the impact of the Magna Carta in other parts of the world. Read through the sections relating to the Age of Enlightenment through to the American Revolution (and don't forget to click on the red diamonds for additional information). Organise your understanding of the impact of the Magna Carta using a PMI (Plus, Minus, Interesting) chart. You will find a PMI template on your obook pro.

Worksheet
Plus, Minus, Interesting template

Weblink
The Magna Carta

25.2 Common law

In this topic, you will:

» learn about the role of the common law in Australia.

Australia's laws are made in two ways. **Statute law** is made and passed by **parliaments** (see page 492). **Common law** is created by judges and is based on the precedents they set when deciding a case.

Making common law

The role of a judge is to interpret statutes and apply them to individual cases. However, statutes cannot anticipate every single issue that may arise, so sometimes the law is not clear about how a particular case should be dealt with. In these circumstances, judges have the power to use their legal expertise to apply a statute in a way they think best upholds the intention of the law and resolves the issue fairly. This decision may set a **precedent**, which means that similar cases in the future should be dealt with in the same way. Parliament can also decide that a precedent set by a judge is so important that it needs to be turned into a statute. This process is known as **codification**.

Common law can be created by judges in all courts. However, a judge only has to follow a precedent if it was set by a judge in a superior court in Australia's court hierarchy (see Source 1). This means that all common law created by the High Court – the highest court in the land – is binding on every court in Australia.

Which is the most powerful type of law?

When you think about the law, you probably think about the kind that is made or enforced by courts; that is, common law. However, in the hierarchy of laws in Australia, common law is actually at the bottom (see Source 4 on page 492).

In this country, the **Australian Constitution** is the most powerful piece of law, as it can only be changed by the agreement of the citizens of Australia (see page 472). The second most powerful type of law is statute law, as it can only be created or changed after a robust process through both houses of parliament (see Source 5 on page 493), after which it must be given royal assent by the governor-general. Common law is the least powerful type of law in Australia, because it can be easily changed by parliament. If parliament disagrees with a new precedent set by a judge, a statute can be passed that overrides the common law and is to apply in all future cases.

statute law
law that is made by parliament; also called statute, legislation, Act of Parliament or statutory law

parliament
the organisation that makes the laws in a country

common law
law that is created by the courts when a judge makes a ruling about a case; also referred to as a precedent, because it sets a standard for all future judges to refer to when deciding a case

precedent
a previous case or example that is used as a guide for decision making when similar circumstances arise

codification
when parliament creates a statute based on a precedent set by a judge

Australian Constitution
a written set of rules and principles that guide the way Australia is governed

25.2 CHECK YOUR LEARNING

Review and understand

1 In your own words, **define** 'precedent'.
2 **Identify** which court has the highest level of authority in Australia.
3 **Outline** why the need for common law might arise.

Apply and analyse

4 Look at Source 1. **Determine** (decide) which court is best suited to hear the following cases:
   a a murder case
   b a drink-driving case
   c a taxation case
   d divorce proceedings.
5 **Summarise** why common law is less powerful than statute law and constitutional law.
6 **Suggest** one reason why higher courts hear appeals from courts lower in the court hierarchy.

High Court of Australia: The highest court in the land

- Comprises the Chief Justice and six other judges
- Cases may be heard by three, five or all seven judges (full bench)
- Rulings are by majority decision; they are binding
- Has jurisdiction to hear all cases involving the federal government
- Hears appeals from supreme and federal courts
- Only court that can interpret the Constitution

Commonwealth courts

Federal Court of Australia

- Hears cases under federal laws (e.g. industrial relations, bankruptcy, taxation)
- Holds court sessions in all capital cities and some towns
- Has a Chief Justice (and sometimes other judges)
- Hears appeals from lower Commonwealth courts

Federal Circuit and Family Court of Australia

- Formed in 2021 after a reform that brought together the Federal Circuit Court and the Family Court
- Hears cases relating to family law (e.g. divorce, parenting arrangements, property settlement), discrimination, migration, privacy and copyright
- Holds hearings in all capital cities in metropolitan and regional (rural) areas

The Federal Circuit Court and the Family Court were united into a single court in 2021.

State and territory courts

Supreme Courts

- Hear most serious criminal cases (e.g. murder) and most complex civil cases
- Highest court in each state and territory
- Comprise Trial Divisions and Courts of Appeal
- Hear appeals from lower state and territory courts

Intermediate courts: District and County Courts

- Hear more serious criminal cases and more complex civil cases
- Judge hears and decides civil cases
- Judge and jury hear criminal cases: jury decides guilt; judge decides sentence
- Hear appeals from Magistrates and Local Courts

Lower courts: Magistrates and Local Courts

- Hear minor civil, family law and criminal cases (e.g. small property claims, drink driving, domestic violence)
- No jury
- Magistrate hears and decides cases

Source 1 Australia's court hierarchy – Australia has many different courts, and each has a different role, responsibilities and level of authority.

25.3 Statute law

In this topic, you will:

» learn how statute law is made in Australia.

As you have learnt, statute law is created by parliaments. A state parliament can only pass laws relating to issues affecting its own state. On the other hand, the **federal** parliament can pass laws that apply to the entire nation. For example, the *Coronavirus Economic Response Package (Jobkeeper Payments) Amendment Act 2020* (Cth) is a federal statute that was passed to provide financial support to Australian workers and businesses affected by the COVID-19 pandemic.

federal
relating to the central government of the Commonwealth of Australia

bill
a proposed law that has not been passed by both houses of parliament

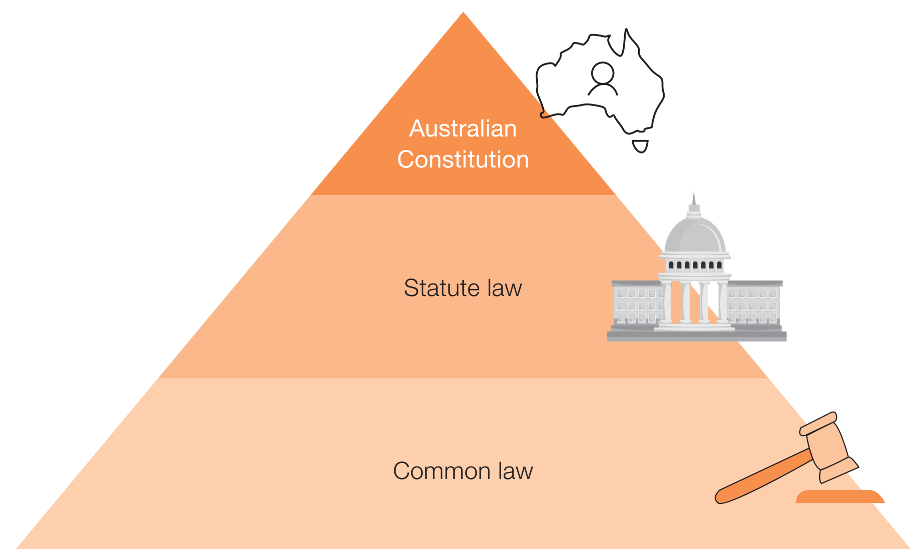
Making statute law

Both federal and state parliaments follow similar steps to make statute law. Source 5 shows the process of how a **bill** becomes a law in federal parliament, using the 2017 amendment to the *Marriage Act 1961* (Cth) as an example. Note that this bill was first introduced in the Senate. While most bills begin in the House of Representatives, they can be introduced in either house of parliament. They then follow the same procedure in each house before they become law. (See page 470 for an explanation of the houses of parliament.)

Source 2 The Australian House of Representatives

Source 3 The Australian Senate

Quiz me!
A quick quiz on statute law



Source 4 The hierarchy of laws in Australia

Source 5 The process of how a bill becomes a law through federal parliament, using the 2017 amendment to the *Marriage Act 1961* (Cth) as an example

<table>
<tr><th>Process</th><th colspan="2">Example</th></tr>
<tr><td>

1 Preparation of a bill

- A bill is proposed by a member of parliament (MP).
- Bills are introduced to change an existing law or to establish a new law.
- A bill only becomes a law if and when it has been approved in the exact same form by both houses of parliament and by the governor-general (the Queen's representative).

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In 2017, Australians had the opportunity to have their say (in a national postal survey) on whether the definition of 'marriage' should be changed in the *Marriage Act 1961* (Cth).

In the survey, Australians were asked to respond 'Yes' or 'No' to the question: 'Should the law be changed to allow same-sex couples to marry?'.

Nearly 80% of Australians voted, and, of these, 61.6% voted 'Yes' to changing the law.

After this survey, a bill to legalise same-sex marriage was introduced to federal parliament.

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A bill to legalise same-sex marriage in Australia was introduced after many years of campaigning and debate about this issue.

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2 First reading

- The MP who is introducing the Bill notifies parliament that a bill will be discussed.
- The MP provides a copy of the Bill to every other MP.
- At this stage, only the title of the Bill is read in parliament, giving the other members a chance to read the Bill in their own time.

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On 15 November 2017, Senator Dean Smith introduced a bill to change the definition of marriage from 'the union of a man and a woman' to 'the union of two people'.

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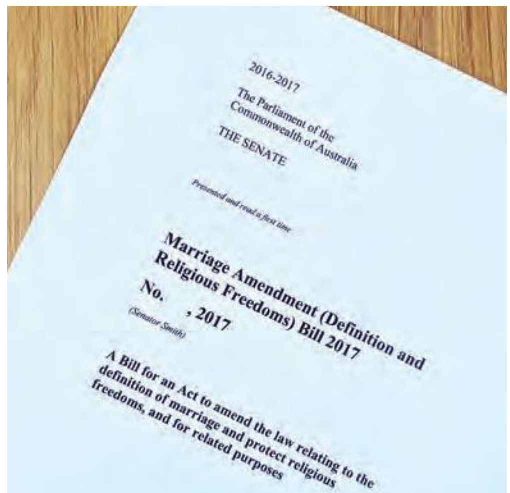

The Marriage Amendment (Definition and Religious Freedoms) Bill 2017 (Cth)

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3 Second reading debate

- The MP who is introducing the Bill gives a 'second reading speech', explaining why the Bill is being introduced.
- Other MPs are allowed to ask questions, suggest changes to the Bill, and debate whether the Bill is the right way to tackle the issue that it aims to address.
- Because laws are such an important part of how our society functions, the second reading debate can often get quite heated, with MPs passionately arguing their different opinions on the issue.
- After the debate, the MPs vote on the Bill and any changes to it.
- If the Bill is passed, it progresses to a third reading.

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On 16 November 2017, Senator Smith gave his second reading speech, where he stated:

> [T]his Bill gives effect to the view that all Australians should have equal access to Australia's marriage laws and that extending marriage to same-sex couples will strengthen and not diminish marriage in Australia.

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Senator Dean Smith introduces the Marriage Amendment (Definition and Religious Freedoms) Bill 2017 (Cth) to the Senate.

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continued

Process	Example	
4 Third reading • After having more time to consider the details of the Bill and any changes resulting from the second reading, the house votes on the Bill. • If the majority of MPs vote to pass the Bill, it moves to the other house of parliament for consideration.	On 29 November 2017, a majority of the Senate passed the Marriage Amendment (Definition and Religious Freedoms) Bill 2017 (Cth). There were 43 'Yes' votes and 12 'No' votes.	 Celebrations after the Marriage Amendment Bill 2017 (Cth) was passed in the Senate
5 Other house • The Bill goes through the three reading stages again in the other house (usually the Senate). • The Bill is passed to and from the upper and lower houses until both houses agree to any changes in the Bill, or until the Senate rejects the Bill completely.	On 4 December 2017, the Marriage Amendment Bill 2017 (Cth) was introduced into the House of Representatives. Debate on the Bill occurred across a number of days, and on 7 December 2017, the Bill was passed (with no amendments from the original bill received from the Senate). Only four MPs voted against the Bill.	 Celebrations after the Marriage Amendment Bill 2017 (Cth) was passed in the House of Representatives
6 The governor-general • If the Bill is passed by both houses, the governor-general reviews and approves the law by giving the Bill royal assent. • Giving royal assent is usually just a formality, as no governor-general has ever refused to give assent to a law.	The governor-general assented to the Marriage Amendment Bill 2017 (Cth) on 8 December 2017.	 Then Governor-General Sir Peter Cosgrove (right) signs the Marriage Amendment Bill 2017 (Cth), with then Prime Minister Malcolm Turnbull (left) and Attorney-General George Brandis (centre) in attendance at Government House, Canberra.

royal assent
approval given by the governor-general (as the Queen's representative) for a bill to become official law

25.3 CHECK YOUR LEARNING

Review and understand

1 **Identify** the two houses of the Australian parliament.

2 When does a bill become a law?

Apply and analyse

3 **Explain** what you think is the purpose of the second reading speech given by the MP who introduces a bill.

4 Think about why it is important that both houses of parliament debate a bill. What do you think would happen if this debate did not occur?

Evaluate and create

5 **Create** a flow chart that shows the process of a bill becoming a law. Keep your explanation of each stage of the process to 25 words or less, and use pictures to aid your explanation.

25.4 Different types of law

In this topic, you will:

- understand the differences between criminal and civil law
- learn about Aboriginal and Torres Strait Islander peoples' customary law.

In Australia, we can place law into different categories:

- *Civil law* generally deals with disputes between people or organisations, as well as acts that cause loss to others.
- *Criminal law* generally deals with acts that intentionally cause harm to others.
- *Customary law* refers to the rules, customs and traditions of Aboriginal and Torres Strait Islander peoples and, while it does not apply to all Australians, can be of great significance to these peoples.

Criminal law

Crimes can be divided into serious offences (such as murder) and less serious offences (such as damaging property or using public transport without buying a ticket):

- Serious offences are known as **indictable offences**. Indictable offences generally go to trial and are heard by a judge and jury.
- Less serious offences are known as summary, or **simple offences**. Simple offences are generally dealt with 'summarily' (that is, quickly) by the police or a magistrate.

The sanctions (penalties) for simple offences are less severe than those for indictable offences.

indictable offence
a serious criminal offence that is usually heard by a judge and jury

simple offence
a less serious criminal offence that is usually heard by a magistrate

Punishing crime

If an accused person is found guilty of committing a crime, they will be punished by a court. This is done for a number of reasons, including:

- to prevent the person from committing the crime again
- to deter other people from committing the same crime
- to show society that the crime is unacceptable and will not be tolerated.

Punishments vary and are based on the crime, the offender and other factors.

Key skill worksheet
Analysing sources: Weighing up the evidence

Source 6 In Australia, some cases can be heard by a judge and a jury. At the end of a case, the jury must work together to decide whether or not the accused is guilty or not guilty.

Source 7 Monika Samaan was awarded $8 million compensation after contracting severe salmonella (a type of food poisoning) from a KFC Twister. The salmonella poisoning left her brain-damaged and unable to speak.

Civil law

Civil law protects individuals. It typically deals with disputes between individuals, corporations and government bodies over actions (or lack of action) that result in a person experiencing loss or harm. Civil law generally aims to right wrongs by compensating (paying) for the losses suffered.

If an individual has their rights infringed and suffers or is harmed as a result, that individual can sue the party who breached their rights and caused the loss for **damages**.

Civil law means we have the right to expect others to be careful in matters that affect us. If others are not careful and we are harmed, civil law gives us ways to right this wrong. For example, if we are eating at a restaurant, we have the right to expect that the people preparing and serving our food are following safe food-handling procedures, so that we do not become sick when we eat that food. If we do become sick from eating food that has been carelessly prepared, we can take civil action against those responsible. The point of taking people to court in this way is to come to a resolution in which the person who has been wronged is compensated for their suffering.

Civil disputes are judged on the **balance of probabilities**. This means that the judge will support a claim – that is, find in favour of the plaintiff (the party making the legal claim) – if it is more likely than not that the defendant (the party being sued) caused the plaintiff harm.

damages
an amount of money that a court orders one party to pay to compensate the wronged party for the loss they have suffered

balance of probabilities
the standard of proof in civil disputes; for a plaintiff to be successful, they must establish that it is more probable (i.e. likely) than not that their version of the facts is correct

customary law
rules, customs and traditions upheld by Aboriginal and Torres Strait Islander peoples

Aboriginal and Torres Strait Islander peoples' customary law

The **customary law** of Aboriginal and Torres Strait Islander peoples has been developed over many generations and is traditionally passed down by word-of-mouth. There is some variation in the laws between different nations and language groups.

One customary law that is very different to Australian law is the idea of land ownership. The concept of owning land was first introduced by Europeans when they colonised Australia and claimed ownership of the land. Aboriginal and Torres Strait Islander peoples consider the land to be a sacred thing to look after, not own.

The Dreaming

The **Dreaming** is a belief system, or world view. Dreaming stories lay down the rules for people to live by, including the social and moral order that allows people to live together peacefully.

Dreaming
a belief system at the centre of all Aboriginal cultures, giving meaning to everything – including creation, spirituality, family, the land and the law

Disputes and Elders

Traditionally, Aboriginal and Torres Strait Islander nations and communities did not answer to a centralised government. Instead, everyone took part in the running of their community and the community's **Elders** played a very important role in maintaining order. Elders led by example, and passed down the stories and laws of the Dreaming to the younger generations.

If there was a problem or dispute, people could take their issue to the Elders for advice or resolution. Sometimes, Elders would punish a person who had broken the law. The type of punishment a person received depended on their crime (as it still does today). The threat of punishment also aimed to deter people from committing a crime.

Elder
a key person and keeper of cultural and spiritual knowledge within Aboriginal and Torres Strait Islander communities

Customary law today

CASE STUDY

While customary law is not officially recognised as Australian law, there has been some progress towards recognising it alongside Australia's current legal system.

An example of this was seen in the 1998 Northern Territory case of Galarrwuy Yunupingu and Michael McRostie.

McRostie was taking photos of Galarrwuy Yunupingu's family without a permit and contrary to Yolngu law. Yunupingu, a senior Elder of the Gumatj clan who was responsible for upholding Yolngu law, took the camera off McRostie to destroy the film, and in doing so knocked the photographer, who was still attached to his camera by a strap.

When McRostie took Yunupingu to court for assault and criminal damage, a judge found that Yunupingu was well within his rights to take the camera off McRostie in order to fulfil his responsibilities as Elder and protector of Yolngu land and law.

The case against Yunupingu was dismissed in favour of customary law over criminal law.

*

Think, pair, share
- Think about the issues associated with recognising Aboriginal and Torres Strait Islander peoples' customary law within the Australian legal system.
- Discuss your ideas with a partner.
- Share your thoughts with the class.

25.4 CHECK YOUR LEARNING

Review and understand

1 **Outline** the role Elders play in many Aboriginal and Torres Strait Islander communities.

Apply and analyse

2 **Compare** simple offences and indictable offences. Remember, when you compare two things you must talk about how they are similar and how they are different.

3 **Explain** what we mean when we refer to an individual suing for 'damages'.

4 **Distinguish between** the current Australian Government's idea of land ownership and the traditional ideas of land ownership held by Aboriginal and Torres Strait Islander peoples. Remember, when you distinguish between two things you must talk about how they are different.

Evaluate and create

5 **Create** a chart or table that shows the differences and similarities between criminal law, civil law, and Aboriginal and Torres Strait Islander peoples' customary law.

25B RICH TASK

Quizlet
Revise the key terms you have learnt so far.

Bullying

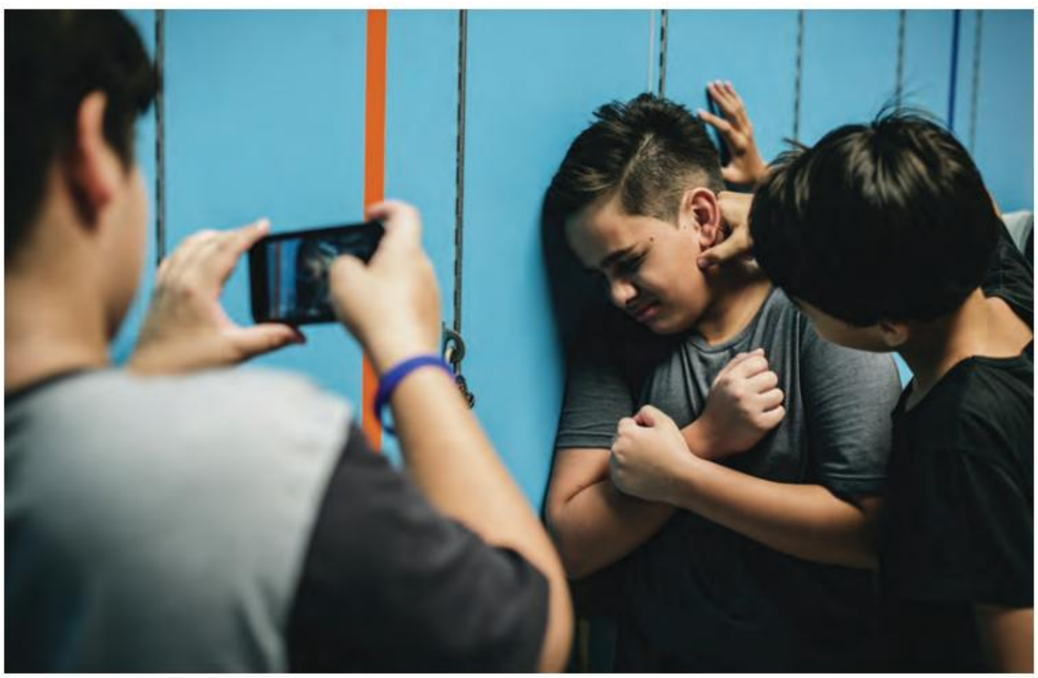
Bullying can be a significant problem in schools across Australia. Government research suggests that around one in four students are affected by bullying. Experiencing bullying can increase a person's risk of having poor mental health, even after leaving school.

Bullying involves repeatedly making someone feel less valuable. There are different types of bullying:

- *verbal* – using words to hurt another person's feelings, such as teasing or name-calling
- *social* – hurting someone's reputation or relationships, such as by spreading rumours about them or excluding them from group activities
- *physical* – hurting a person's body or property, such as by kicking, punching or pushing them, or breaking their belongings
- *cyberbullying* – using phones, computers or other electronic devices to hurt another person's feelings, reputation or relationships.

Bullying can happen anywhere at any time. Access to mobile phones and social media such as Instagram, Snapchat and Facebook can make the problem worse. Around one in five young people experience cyberbullying. This has left many Australians demanding tougher laws on bullying, and government funding to develop programs to fix the problem.

If you are experiencing or have witnessed bullying, notify your parents or a teacher at the school so that they can help stop the bullying from happening in the future. You can also call Kids Helpline on 1800 55 1800 or Headspace on 1800 650 890 for a chat about any problems that you might be having.



Source 8 Cyberbullying can include threatening, humiliating or abusing others online.

KEY SKILL
Evaluating & decision making

Drafting a bill

Earlier in this chapter, we looked at how a law is made from a proposed bill. Now we will look at how a bill is drafted before it is presented to parliament. A bill often requires many drafts before it is ready to be presented.

Follow these steps to draft your own bill.

Step 1 Identify the problem that you would you like to address; for example, bullying.

Step 2 Determine whether the Bill will change an existing law, or if it will be a completely new law.

Step 3 Write a short title that reflects what the Bill is about and why it is being proposed.

Step 4 Write a detailed list of rules that would help fix the problem.

Step 5 Write who would be responsible for enforcing those rules.

Step 6 Write what the penalties would be for not following the rules listed.

Step 7 Write a list of definitions explaining what any tricky words mean. This way, the Bill can be easily understood by everyone.

For more information on this key skill, refer to page 466 of 'The civics and citizenship toolkit'.

Practise the skill

1 In groups of three or four, **apply** the steps above to prepare a draft bill to help solve the issue of bullying (for step 2, assume there is no existing law related to bullying).

2 Present your draft bill to the class. Allow other members of the class to make suggestions as to how the Bill could be changed.

3 Make the suggested changes that the majority agree on, and take a class vote on whether the Bill should be passed or not.

Extend your understanding

1 **Research** another issue, such as climate change or the treatment of asylum seekers. What changes would you like to see on this issue? Use the information you have found to prepare a draft bill for a law to make these changes. Present the draft bill to your class, as you have done with your anti-bullying bill.

Source 9 Social bullying can include socially excluding other people, or spreading rumours or lies about them.

25 CHAPTER REVIEW

Review questions

25A How does Australia's legal system protect the individual's right to justice?

1 **Identify** four key principles that guide Australia's legal system to ensure that justice is served. (2 marks)

2 **Explain** the difference between the terms 'beyond reasonable doubt' and 'balance of probabilities'. How are they different and where are they used? (4 marks)

3 'Even though he was the prime minister at the time, Malcolm Turnbull was fined $250 for breaking New South Wales maritime laws by not wearing a life jacket while steering his inflatable dinghy in Sydney Harbour in 2017.'

Analyse this statement to explain how it shows the rule of law being upheld in Australia. Remember, when you analyse something you should break it down into smaller parts and explain how they relate to each other. In this case, think about how the statement relates to the rule of law. (4 marks)

(Total: 10 marks)

25B How are laws made and applied in Australia?

1 In your own words, **define** 'customary law'. (1 mark)

2 **Distinguish between** criminal law and civil law. Remember, when you distinguish between two things you must talk about how they are different. (4 marks)

3 **Summarise** the role of parlimament in making statute law and common law. (5 marks)

(Total: 10 marks)

Review activity

Read the information and examine the sources, and answer the following questions.

The Code of Hammurabi

Laws have existed for thousands of years. As ancient tribes grew into complex societies, the need to determine the rights and responsibilities of people became greater. One of the oldest known groups of laws comes from Babylon, between 1792 and 1754 BCE, and is known as the Code of Hammurabi. Legend has it that the laws were given to King Hammurabi by Shamash, the god of justice.

There were as many as 300 individual laws in the Code of Hammurabi, and they covered a wide range of issues – including murder, assault, divorce, debt, adoption, trade and agricultural practices. Hammurabi used them to govern his fast-growing empire of citizens. Not only did the code stipulate the rules that all citizens must follow, but also it dictated what actions must be taken by the judges, accuser and accused.

Source 10 is a translation of one of the most famous laws from the code.

Source 10

If a man destroys the eye of another man, they shall destroy his eye. If one breaks a man's bone, they shall break his bone.

Translated extract from the Code of Hammurabi, *c.* 1792–54 BCE

1 Are the crimes described in Source 10 indictable offences or simple offences? (2 marks)

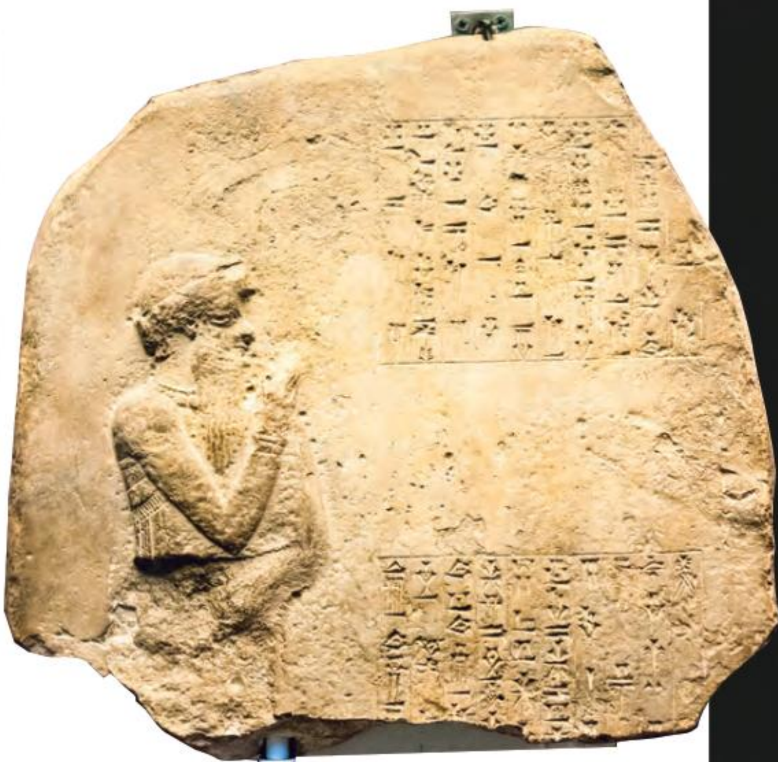
2 **Explain** what you think this law was trying to achieve. (3 marks)

3 **Suggest** how this law might be applied to a situation where one person physically attacked another person. (3 marks)

4 **Explain** why wide-ranging laws develop in complex societies. What would happen if they didn't? (4 marks)

5 **Compare** this law with the following elements of Australia's justice system today:
- the trial system (4 marks)
- the punishment (4 marks).

(Total: 20 marks)



Source 11 The Code of Hammurabi was carved into stones, which were then placed around the city of Babylon for the public to see.

Check your Student obook pro for these digital resources and more:

Student book questions
Chapter 25

Key skill worksheet
Communicating & reflecting: Chapter 25

Quizlet
Play a game of Quizlet on Justice and the law.

Chapter review quiz
Chapter 25

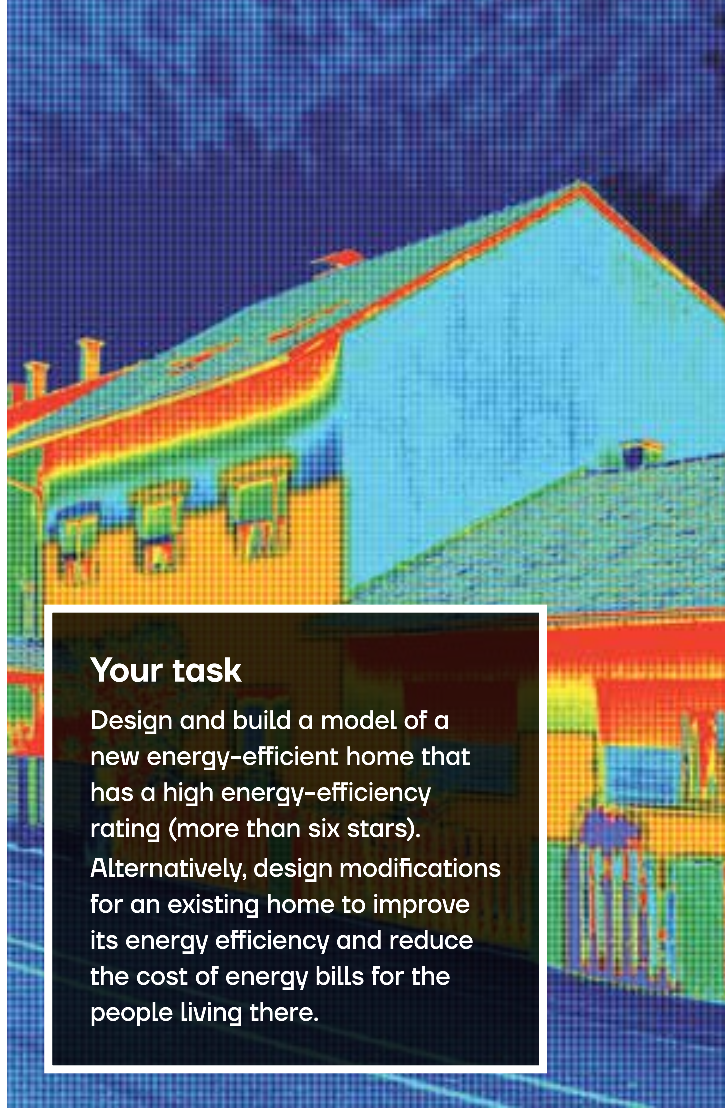
[STEAM project 1]

How can we build more energy-efficient homes so that we live more sustainably?

Have you ever considered how much energy it takes to heat or cool your home? A study by the Australian Government found that homes contribute 11 per cent of Australia's total carbon emissions. Reducing the amount of energy needed to heat or cool a home will not only save people money on their gas and electricity bills, it will make housing more sustainable.

NatHERS

The Nationwide House Energy Rating Scheme (NatHERS) is a rating system that is used across Australia to identify the energy efficiency of homes (where ten stars is the most energy efficient). Computer modelling software uses the local climate, the orientation of the home and materials used in construction to estimate the amount of energy needed to heat or cool the home. In most states and territories of Australia, new homes must reach a minimum of six stars to be approved for construction. There are many ways to improve the energy efficiency of your home. For example, if you insulate the walls, floors and roof, and use awnings (covers that extend over windows or doors), you can reduce the amount of thermal energy needed to cool the home in summer. Or in cooler climates, if you design the home so that living areas are on the northern side, you can maximise the sunlight that is available to heat the home in winter.



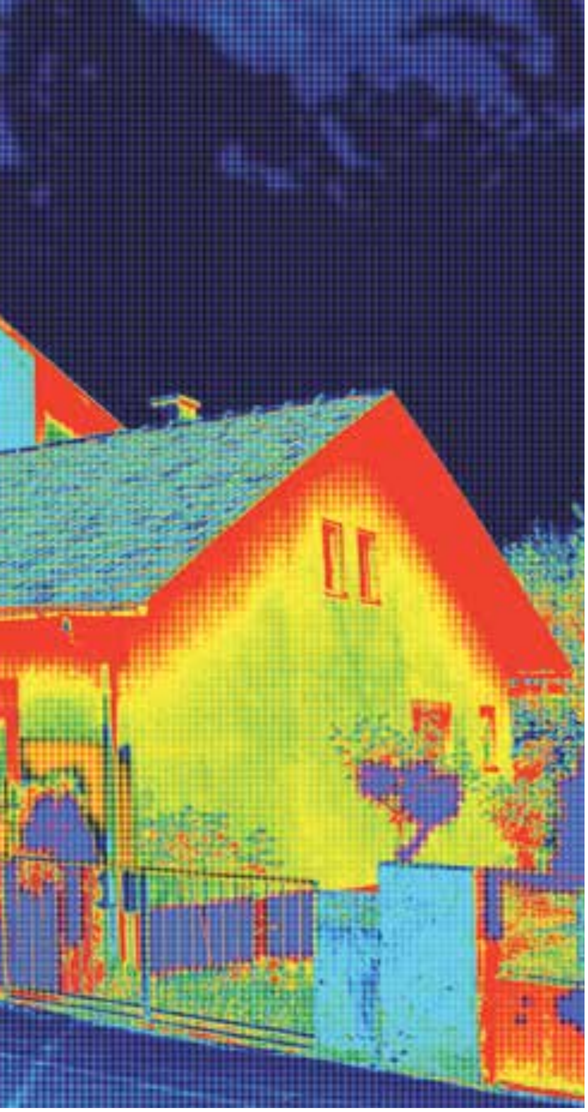
Your task

Design and build a model of a new energy-efficient home that has a high energy-efficiency rating (more than six stars). Alternatively, design modifications for an existing home to improve its energy efficiency and reduce the cost of energy bills for the people living there.

Figure 1 Infrared imaging shows warmer temperatures as red and cooler temperatures as blue. A building with insulation will lose less thermal energy to the outside environment in winter and will gain less thermal energy from the outside environment in summer.

Retrofitting homes

Not everyone wants to or can afford to build a new home. People who rent sometimes have little choice when it comes to the energy efficiency of their home, but this doesn't mean that they need to have large gas and electricity bills. There are things that they can do to reduce the movement of thermal energy in summer or winter. Covering the floor with rugs, preventing heat from moving in or out of windows, and controlling windows to manage airflow are all ways to make a home more energy-efficient and liveable.



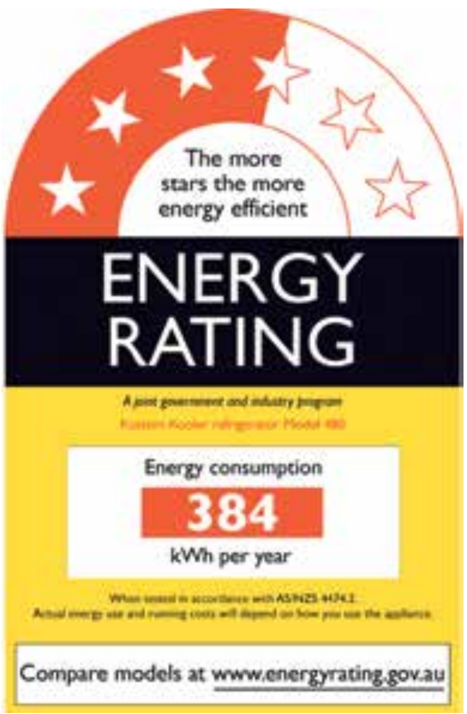


Figure 2 Energy rating schemes help consumers to understand the energy efficiency of products or appliances. The more stars, the more energy efficient the product or appliance is.

HUMANITIES

In Geography this year, you will learn about the importance of sustainable housing in Australia's urban centres and major cities. You will explore how the forecasted growth of Australia's cities could impact their liveability, and the environmental issues resulting from urbanisation.

In Economics and Business, you will study the role and social responsibilities of businesses in reducing their environmental impact, and how these businesses can be attractive to consumers who want to make sustainable choices.

To complete this task successfully, you will need to study seasonal weather patterns at the location of your energy-efficient home, to improve energy use.

You will find more information on this in Chapter 5 'Urban life' and Chapter 21 'The world of business' of *Oxford Humanities 8 Victorian Curriculum*.

MATHS

In Maths this year, you will learn how to determine the area and volume of different shapes, using and converting between appropriate units. You will also learn skills for dealing with percentage changes and profit and loss. These skills will help you to quantify the costs and benefits of design features and predict the popularity of market incentives. You will perform calculations with and without digital technology.

To complete this task successfully, you will need to perform calculations for your model home, and then scale up to estimate the potential benefits of your design at a national level.

You will find help for applying these maths skills in sections 3B 'Percentage calculations', 3C 'Financial calculations', 8D 'Area of quadrilaterals' and 8E 'Area of a circle' of *Oxford Maths 8 Victorian Curriculum*.

SCIENCE

In Science this year, you will learn about how thermal energy can be transferred between objects (such as between a home and its surroundings). You will also examine the impact that insulation, window awnings and verandas have on the ability of a home to stay cool in summer.

To complete this task successfully, you will need to identify how each element of a home's design can affect its heating and cooling needs. You will also need to identify the elements that can be changed in a new home design, and compare these to the elements that can be changed in an established home.

You will find more information on this in Chapter 3 'Energy' of *Oxford Science 8 Victorian Curriculum*.

The design cycle

To successfully complete this task, you will need to complete each of the phases of the design cycle.

Discover

When designing solutions to a problem, you need to know who you are helping and what they need. The people you are helping, who will use your design, are called your end-users.

Consider the following questions to help you empathise with your end-users:

- Who am I designing for? How big is their family and home?
- What factors might affect the liveability of the home?
- What do they need? What do they not need?
- What does it feel like to face these limitations on liveability? What words would you use to describe how it would feel to face these limitations?

To answer these questions, you may need to investigate using different resources, or even conduct interviews or surveys.

Define

Before you start to design your home modifications, you need to define the parameters you are working towards.

Define your version of the problem

Rewrite the problem so that you describe the group you are helping, the problem they are experiencing and why it is important. Use the following phrase as a guide.

'How can we help (the group) to solve (the problem) so that (the reason)?'

Determine the criteria

1 Describe the orientation of the land where the home will be built or modified (include the location of sunrise and sunset, the angle of sun in the middle of summer and winter and any existing shadows).
2 Describe any existing energy-efficient features of the current home or design.
3 Describe how you will measure any improvement in energy-efficient features of the home.

Ideate

Once you know who you're designing for, and what the criteria are, it's time to get creative!

- Outline the criteria or requirements your design must fulfil (for example, improving heating or cooling of the home).
- Brainstorm at least one idea per person that fulfils the criteria.

Remember that there are no bad ideas at this stage. One silly thought could lead to a genius innovation!

Build

Draw each individual design.

Include in the individual designs:

a labels for each part of the design
b the materials you will use for the home's construction
c a description of how the modifications will improve the energy star rating of the home
d an estimation of the cost of applying the modifications.

Present your design to your group.

Build the prototype

Choose and build two or three model homes for your group design (scale: 2 cm = 1 m).

Use the following questions as a guideline for your prototype.

- What materials will you need to build your model home?
- What skills will you need to build your model home?
- How will you test the effectiveness of your model home? (What will you compare it to?)
- How will you identify each energy-efficient feature of your model home?
- How will you collect data that supports your claims about energy efficiency?

Test

Use the scientific method to design and test the energy efficiency of your model home. You will test more than one design so that you can compare them, so you will need to control your variables between tests.

What criteria will you use to determine the success of your model home?

Conduct your tests and record your results in an appropriate table.

Communicate

Present your home design as though you are trying to get your peers to invest in it.

In your presentation, you will need to:

- construct a labelled diagram of your model home in its orientation, including the location of sunrise and sunset, the angle of sun in the middle of summer and winter, and any existing shadows
- describe the key energy-efficient features of your model home
- explain how each energy-efficient feature affects the liveability of your model home
- explain the principles that support your design (the importance of energy efficiency and how the existing landscape affected the design of the home)
- estimate the cost of implementing your design
- explain and quantify the benefits on a national scale if all new homes were to include your design features.

Check your Student obook pro for the following digital resources to help you with this STEAM project:

Student guidebook
This helpful booklet will guide you step-by-step through the project.

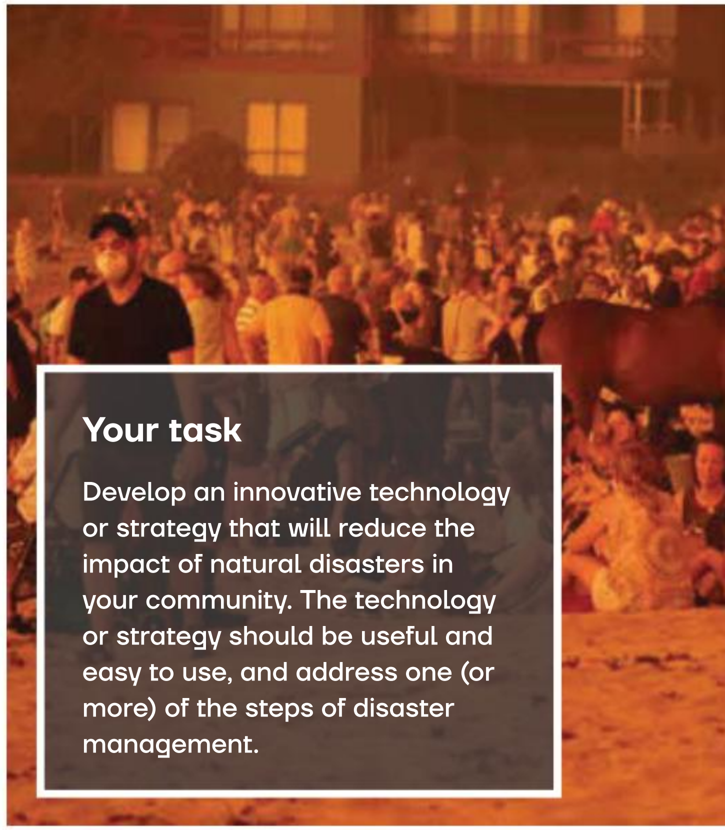
What is the design cycle?
This video will help you to better understand each phase of the design cycle.

How to manage a project
This 'how-to' video will help you to manage your time throughout the design cycle.

How to pitch your idea
This 'how-to' video will help you with the 'Communicate' phase of your project.

[STEAM project 2]

How can we use technology so that the impact of natural disasters is reduced?



Your task

Develop an innovative technology or strategy that will reduce the impact of natural disasters in your community. The technology or strategy should be useful and easy to use, and address one (or more) of the steps of disaster management.

Figure 1 Hundreds of people (and animals) huddled on Malua Bay beach in NSW for almost 24 hours, as bushfires tore through communities in the nearby Batemans Bay area.

Across the world, climate patterns are changing and weather events are becoming more extreme. In 2020, 20 per cent of Australia's forests were burnt, a record-breaking 30 named hurricanes developed over the Atlantic Ocean, and an extreme monsoon season in Asia caused flooding across a quarter of Bangladesh. Australia is particularly prone to natural disasters. Bushfires, flooding, drought periods and cyclones dramatically affect people's lives, and alter natural landscapes.

Natural disasters can be devastating for communities affected by them. Recovering from natural disasters also comes with huge economic costs. This can sometimes lead to a harmful cycle in which a nation gets stuck between experiencing disaster and responding to disaster.

Disaster management

Climate action is one of the 17 Sustainable Development Goals agreed to in 2015 by world leaders. One of the identified targets in combating climate change is to strengthen the resilience and adaptive capacity of all countries to natural disasters and hazards related to climate.

It is essential that communities prepare for disasters so as to reduce their impact. The United Nations Office for Disaster Risk Reduction (UNDRR) recommends using technology as part of disaster management, for example:

- warning systems in Japan that trigger emergency breaks in bullet trains if earthquakes are detected
- systems in sub-Saharan Africa that monitor rainfall data and analyse trends to forecast and build resilience to drought
- atlases in China that record the risk of natural disasters, using location data from spatial technologies such as GPS.

After the 2019–20 Australian bushfires, it was argued that satellite technology, drones and mobile phone apps would have been extremely helpful for fighting the fires and communicating with the people affected.

Disaster management should include four steps:

- prevention – reducing hazards before a disaster takes place, so its impact is not as severe (e.g. building schools that are earthquake resistant)
- preparation – training people so they know how to act when a disaster happens (e.g. running evacuation drills)
- response – taking action during a disaster (e.g. emergency crews and volunteers taking on emergency operations)
- recovery – taking action to help people rebuild their lives (e.g. restoring services in a community).

Disaster management is an ongoing process that can occur like a cycle between the phases of prevention, preparation, response and recovery.

HUMANITIES

In Geography this year, you will learn about landscapes and landforms and how they can be degraded by both human and natural causes. You will study a geomorphic hazard, its impacts on a place and various ways of responding to it.

In History, you might also study how past societies have dealt with disasters and managed their responses; for example, how Rapa Nui (Easter Island) inhabitants adapted to life without trees, how Shogunate Japan developed policies to sustain its forests, or how an unstable climate (including drought and heavy monsoons) affected the Khmer Empire.

To complete this task successfully, you will need to investigate a potential natural hazard in your local area. You will research any current disaster-response plans related to managing such an event, and gain an understanding of how various people and businesses in the community would be impacted.

You will find more information on this in Chapters 2, 16, 15 and 13 of *Oxford Humanities 8 Victorian Curriculum*.

MATHS

In Maths this year, you will consolidate and extend your skills in representing and interpreting primary and secondary data. This will include creating and analysing plots of non-linear data, investigating the use of sampling methods, and broadening your understanding of measures of spread. You will also perform calculations with percentage changes, profit and loss. You will analyse and represent data, both with and without digital technology.

To complete this task successfully, you will need to weigh up the costs of your disaster-management technology or strategy against its potential benefits, including by estimating the likelihood of natural disasters and the severity of their effects.

You will find help for applying these maths skills and statistics in sections 3B ‘Percentage calculations’, 3C ‘Financial calculations’, 6D ‘Plotting linear and non-linear relationships’, and 9A ‘Collecting data and sampling methods’ of *Oxford Maths 8 Victorian Curriculum*.

Figure 2 Floodwaters near Sydney

SCIENCE

In Science this year, you will learn about how the energy of the Earth over long periods of time generates forces that can melt rocks, produce volcanoes and make diamonds. You will also learn how the kinetic energy in the air and waves can cause damage to the surrounding environments during cyclones and tsunamis. The Australian bush also contains large amounts of chemical energy that is transformed into thermal energy during the summer fire season.

To complete this task successfully, you will need to consider how energy is transferred and transformed during natural disasters. This understanding will allow you to predict and potentially reduce the impact of the disaster in your local community.

You will find more information on this in Chapter 3 ‘Energy’ of *Oxford Science 8 Victorian Curriculum*.

The design cycle

To successfully complete this task, you will need to complete each of the phases of the design cycle.

Discover

When designing solutions to a problem, you need to know who you are helping and what they need. The people you are helping, who will use your design, are called your end-users.

Consider the following questions to help you empathise with your end-users:

- Who am I designing for?
- What natural disaster could they face?
- How often could this disaster occur, and on what scale?
- What do they need? What do they not need?
- What does it feel like to face these problems? What words would you use to describe these feelings?
- What could the cost of such a disaster be in terms of lives lost, income lost, damage to private property and public infrastructure, and environmental impact?

To answer these questions, you may need to investigate using different resources, or even conduct interviews or surveys.

Define

Before you start to design your innovative strategy or technology, you need to define the parameters you are working towards.

Define your version of the problem

Rewrite the problem so that you describe the group you are helping, the problem they are experiencing and why it is important. Use the following phrase as a guide.

'How can we help (the group) to solve (the problem) so that (the reason)?'

Determine the criteria

1 Define the term 'innovation'. Describe how much a strategy needs to differ from current practice to be considered innovative.
2 Describe how the natural disaster will affect the people in the community.
3 Describe how you could measure whether your solution will reduce the impact of the natural disaster.
4 Explain how you could determine what cost (price) should be acceptable for implementing your solution.

Ideate

Once you know who you're designing for, and you know what the criteria are, it's time to get creative!

- Outline the criteria or requirements your designed strategy or technology must fulfil (for example, how many people will be helped, how much they will be helped, how long they will need the help).
- Brainstorm at least one idea per person that fulfils the criteria.

Remember that there are no bad ideas at this stage. One silly thought could lead to a genius innovation!

Build

Draw each design, strategy or technological idea. Label each stage of the strategy or part of the technology and how it will be used by the community.

Include in the individual strategy or technology:

a the timeline for the activation of the strategy or technology (i.e. how long after the disaster will the idea be ready to be used?)

b the number of people and materials that will be needed for the strategy or technology to reduce the impact of the natural disaster

c a description of how the community will benefit from the strategy or technology.

Present your strategy or technology to your group.

Build the prototype

Choose and build two or three versions of the prototype strategy or technology for your group design.

Use the following questions as a guideline for your prototype.

- What equipment do you have access to?
- What skills do you have, or will you need, to make your prototype strategy or technology?
- How could you model your strategy or technology if equipment is not available?
- How could you test the effectiveness of the prototype strategy or technology with the community?

Test

Use the scientific method to design an experiment that will test the effectiveness of your prototype strategy or technology. Alternatively, conduct a survey of the community to determine their opinion of the usefulness of the prototype.

Conduct your tests or survey your community, and record your results in an appropriate table.

Consider how you could use the results of the experiment or survey to modify your design.

Communicate

Present your design to the class as though you are trying to get your peers to invest in your strategy or technology.

In your presentation, you will need to:

- describe how the natural disaster will affect your community
- describe your prototype strategy or technology
- describe how the prototype will reduce the impact of the natural disaster on the community
- describe the materials, people and money that will be required to have the required effect on the natural disaster.

Check your Student obook pro for the following digital resources to help you with this STEAM project:

pro

Student guidebook
This helpful booklet will guide you step-by-step through the project.

What is the design cycle?
This video will help you to better understand each phase in the design cycle.

How to manage your project
This 'how-to' video will help you to manage your time throughout the design cycle.

How to define a problem
This 'how-to' video will help you to narrow your ideas down and define a specific problem.

Glossary: Geography

A

alphanumeric grid referencing
a coordinate system on a grid in which each cell is identified by a combination of a letter and number; using this system makes it easy to locate a specific position on a map

annotated visual display (AVD)
a way of presenting the final results of a research project, incorporating images, graphs, notes and explanations in a poster-style format

aquifer
layers of rock or soil in the ground that hold water or that water can pass through

arch
a natural feature, usually rock, that forms a bridge-like arc as a result of erosion

ash
very fine rock and mineral particles, less than 2 millimetres in diameter

B

BOLTSS
a mnemonic (memory device) for remembering the essentials of a map: border, orientation, legend, title, scale and source

C

cardinal points
the four main directions: north, south, east and west

cave
a hollow space along the coast produced by the action of waves

climate change
the long-term change in the average weather patterns of Earth

colony
a country or area under the control of another country, and occupied by people from that country

compass
an instrument with a magnetic needle that points to the north; used for navigation

compass bearings
a precise way of giving compass directions, such as '135° south-east'

census
a 'head count' or audit of the number of people living in a particular place at a particular time; information collected during a census often includes age, occupation, income, etc.

constructive wave
a gentle wave that deposits material and builds up beaches

contour lines
lines drawn on a map that connect points at the same height to show the height and steepness of land

converging
coming together from different directions

Country
for Aboriginal peoples, Country is both a place of belonging and a way of believing; Country includes all living things and embraces creation stories

cover crop
a crop grown for the protection and enrichment of the soil

D

decentralisation
the process of encouraging population growth and job creation in suburbs and smaller regional towns or cities, rather than in central areas of major cities

deforestation
the action of clearing a wide area of trees

deposition
the building up of land through deposits of sand and other materials

destructive wave
a strong wave that wears away coasts and removes material

developing country
a less economically developed country that has some difficulties in supporting the needs of its own people

direction
a way of orienting a map, usually shown by the use of compass points, such as north

distance
the amount of space between two objects or places, generally measured by using the scale on a map

distribution
the way in which things are arranged on the Earth's surface; the pattern formed by the way objects or places are distributed across a space

diverging
moving apart in different directions

Dreaming
the belief system central to all Aboriginal cultures; the Dreaming also provides a moral code and guidance on interacting with Country; the Dreaming is not fixed in time – it is in the past, present and future

E

eastings
the gridlines that run vertically on a topographic map

ecosystem
a community of organisms that live together and interact with each other in a specific environment

epicentre
the place on the Earth's surface directly above where an earthquake occurs

Equator
an imaginary line that runs around the middle of the Earth, separating the Northern Hemisphere from the Southern Hemisphere

erosion
the wearing away of the Earth's surface by water, wind and ice

exception
a feature that falls outside a usual pattern or does not follow an observed pattern

export
sending goods or services from one country to another for sale

F

fieldwork
geography study that takes place at the site of inquiry

food security
a state where all people at all times have access to enough safe, nutritious food to sustain a healthy life

G

geographical inquiry
the process that geographers use to guide their investigations of people, places and things

geomorphic process
a natural process that shapes the Earth's surface (e.g. volcanic eruption or erosion)

ghost net
an abandoned fishing net that floats free in the ocean and is a danger to wildlife

glacial retreat
where the lowest point of a glacier does not extend as far down the mountain as it did previously; this is happening more often because of climate change

glaciers
rivers of ice in mountain and polar landscapes

gross domestic product (GDP)
the total market value of all goods and services produced within a country in a given time frame

H

headland
a piece of land jutting out into the sea

hot spots
points where there is volcanic activity, but the hot spots are not on a plate boundary

I

ice ages
cooler periods in the Earth's history when ice covered much of the northern hemisphere and sea levels were much lower than they are today

ice cap
a thick layer of ice that covers an area of land

ice sheet
a layer of ice covering a large area of land for a long period of time

Industrial Revolution
a period of major change in the late 1700s and early 1800s, where industries were revolutionised by the use of machinery

infrastructure
the facilities and services necessary for any community, city or country to function (e.g. buildings, electricity, roads, airports and water supply)

internally displaced person (IDP)
a person who has been forced to migrate, but remains in their home country

K

kampong
an Indonesian word that means 'village'; it is also used to refer to slum areas in cities

key inquiry question
a question that helps geographers to plan and focus their geographical inquiry

L

lagoon
a shallow stretch of water that is partly or completely separated from the sea by a narrow strip of land

lahars
destructive flows of mud or debris on the slopes of volcanoes

landform
a natural geographic feature or shape that appears on the Earth's surface (e.g. dune, hill, valley, beach or cave)

landscape
a section of the Earth's surface made up of a variety of geographical features (known as landforms) that define and characterise it; landscapes can be natural (e.g. coastal and mountain landscapes) or human (e.g. neighbourhoods and cities)

landscape degradation
a process that occurs when the productivity of land is lost

latitude
imaginary lines running east–west around the Earth's surface, parallel to the Equator, used to work out location and direction

lava
the molten material that flows from a volcano

liquefied natural gas (LNG)
natural gas that has been converted to a liquid form to make it easier and safety to transport and store

longitude
imaginary lines running north–south around the Earth's surface, from the North Pole to the South Pole, used to work out location and direction

longshore drift
the process that moves sediment in a zigzag pattern along a beach by the wash and backwash of waves approaching the shore at an angle

M

magma
the hot, liquid (molten) rock beneath the surface of the Earth

magnetic north
the physical place on the Earth, near the North Pole, to which a magnetised needle points

mantle
the soft layer of hot rock between the crust and the core of the Earth

map
a simplified plan of an area shown from directly above

megacity
a city with a population of more than 10 million people

megalopolis
a collection of large cities that are close together, and so closely linked that they effectively form one continuous urban area

metropolitan area
the total area of the city, including all of its surrounding suburbs

migrant
a person who moves from one place to another

migration
movement of people to a new country or area

mountain ranges
series of mountains or hills ranged in lines and connected by high ground

N

northings
the gridlines that run horizontally on a topographic map

O

oral history
a mix of oral traditions and written history – allowing people to share their memories and ensure their stories are never forgotten

P

plan view
a way of showing something as if the viewer is looking down on it from above; a bird's-eye view

plate boundaries
the edges where two tectonic plates meet; most geologic activities take place here, including volcanoes and earthquakes

pollution
the introduction of harmful materials into the environment

population density
a measurement of the number of individuals per unit area (e.g. 1500 people per square kilometre)

primary data
data for a geographical inquiry that was collected in the field by the geographer conducting the inquiry (e.g. survey data, hand-drawn maps and photographs)

prime meridian
also known as the Greenwich meridian; an imaginary line of longitude that runs from the North Pole to the South Pole; longitude is defined as 0 degrees at the prime meridian

pyroclastic flows
fast-moving and dangerous mixtures of hot gas and rock that are ejected from volcanoes

Q

qualitative data
any information that can be recorded in words, e.g. 'Uluru is very large'

quantitative data
any information that can be recorded as numbers, e.g. 'Uluru is 3.6 kilometres long'

R

refraction
the process by which the direction of a wave is changed when moving into shallow water

refugee
a person who moves to another country because of a natural disaster or to avoid persecution

region
an area of the Earth's surface with a feature that makes it different from surrounding areas

S

sand dune
a hill or mound of sand formed by wind deposition on the landward side of a beach

scale
the relationship (or ratio) between distance on a map and the corresponding distance in the real world

secondary data
data for a geographical inquiry that was not collected by the geographer conducting the inquiry (e.g. textbooks, atlases and government websites)

settler
a person who leaves their homeland by choice to settle in a new country or colony

shield volcano
a volcano characterised by gentle eruptions that emit runny lava over a wide area

spatial pattern
the distribution of features on the Earth's surface that may form particular patterns, such as linear (in lines), clustered or radial (like spokes on a wheel)

spit
a curved build-up of eroded material that forms at the mouth of a river

stack
a part of a cliff that has separated from the mainland as a result of the erosive effect of the waves

subduction
when two tectonic plates meet, and one is forced under the other

suburbanisation
the process of growing cities outwards by building new housing estates and businesses away from the Central Business District

T

tailings
rock waste from mines

tectonic plates
immense, slowly moving pieces that make up the Earth's surface (or crust)

terraced
formed a flat area on a sloping piece of land (such as a mountain face)

tombolo
a deposit of sand linking an island to the mainland (or to another island), formed by longshore drift

topographic map
a map that shows the shape of the land, its relief and landforms

training wall
a wall, bank, or jetty built to confine and direct the flow of a river or tide

transform boundary
when two tectonic plates scrape sideways past each other, often causing an earthquake

trend
the general direction in which something is developing or changing (e.g. the trend in population in Australia is positive because the population is growing)

tsunamis
giant ocean waves, often caused by underwater earthquakes

U

urban explosion
a rapid growth in the number and size of the world's cities

urban renewal
the process of taking areas of land in a city that are no longer being used and redeveloping them

urban sprawl
the growth of a city onto productive farmland on the city fringes

urbanisation
the process of social and economic change that takes place as increasing numbers of people move from rural areas (e.g. farms) to urban areas (e.g. cities)

V

volcanic bombs
masses of liquid rock that explode from a volcano and harden before reaching the ground

volcanic cone
a triangle-shaped mountain formed as material from volcanic eruptions piles up around the volcanic vent or opening in the Earth's crust

volcanologists
scientists who study and monitor volcanoes

W

wealth inequality
the unequal distribution of money and assets in a group of people

Glossary: History

A

absolute ruler
an individual who governs with supreme authority, unrestricted by laws

absolution
a formal statement from a Christian church that a person is forgiven for what they have done wrong

AD
an abbreviation of the Latin '*Anno Domini*', meaning 'in the year of our Lord' – a term used for any time after the birth of Christ (i.e. after 1 AD); it has largely been replaced by CE

age
a period of history with specific characteristics that make it stand out from other periods (e.g. the Stone Age, the Bronze Age)

anatomy
the study of the human body

Anglo-Saxon
a Germanic people who settled in Britain in the 400s CE; they drove the local Celtic people to the land's extremities

animism
a belief system teaching that all creatures, objects and places have a spirit

anthropologists
people who study human societies, customs and beliefs

apprentice
a young person who works for an employer for a fixed period of time in order to learn the particular skills needed in their job

aqueduct
a construction – such as a series of pipes or canals – that carries water from a source to a destination further away

ariki
a member of a noble or chiefly rank in many Polynesian societies

artefacts
objects, small or large, that have been made or changed by people

artisan
a skilled worker in a specialised trade or craft

autopsies
examinations of bodies to discover – or find out more about – the cause of death

B

barbarian
a term used by ancient Romans to describe someone living outside the borders of their empire, whom they considered 'uncivilised'

bartering
the exchanging of goods or services between people (typical of trade before the use of money), where both parties agreed that what was exchanged was of roughly equal value

battlements
the top of the wall around a castle, with regular spaces, through which the people inside could shoot

BC
an abbreviation of 'Before Christ' – a term used for the period of history before the birth of Christ (i.e. before 1 BC); it has largely been replaced by BCE

BCE
an abbreviation of 'Before the Common Era' – a term used for the period of history before the birth of Christ (i.e. before 1 CE); it has largely replaced BC, because it is culturally neutral

bias
a pre-set view about someone or something that is not altered by the presentation of facts and opinions to the contrary

Black Death
a deadly plague that spread across Asia, Europe and Africa during the fourteenth century

bloodletting
the deliberate cutting of someone to cause bleeding; this medieval practice, often performed by barbers, was seen as a treatment and cure for illness

buboes
the blackened, swollen, pus-filled lymph nodes (part of the human body's immune system) evident on the body of someone with the bubonic plague

bubonic plague
an infectious disease caused by bacteria (called *Yersinia pestis*), which are carried by fleas on rats and mice; it often quickly kills those who contract it; visible symptoms include buboes

Buddhism
a major world religion that originated in India, based on the teachings of Buddha; it encompasses a variety of traditions, beliefs and spiritual practices

bushido
the code of behaviour of the Japanese samurai warrior that required honour, loyalty (even to death), good living, thrift and martial arts skills

C

caliph
a historical title used for the religious and political leader of the Muslims; the caliph was regarded as the successor of Muhammad

calpulli
in Aztec society, a neighbourhood within a city-state

cannibalism
when a human eats another human's flesh

caste
a social group into which a person is born; castes are part of a social system known as the caste system, which is generally associated with the Hindu religion in India and is still used today

casualties
people who are killed or injured in war or in an accident

catapult
a weapon that worked like a giant slingshot; it hurled large rocks – and sometimes the infected bodies of people and animals – over a wall, e.g. of a city an army might be laying siege to

Catholic Church
the only Christian Church in Europe until the Protestants started breaking away from Rome in the sixteenth century

cause and effect
chains of events and developments over time (both long term and short term), and the impact these have on people and places

CE
an abbreviation of 'Common Era' – a term used for any time after the birth of Christ (i.e. after 1 CE); it has largely replaced AD, because it is culturally neutral

census
a 'head count' or audit of the number of people living in a particular place at a particular time; information collected during a census often includes age, occupation, income, etc.

century
a period of 100 years

chacmool
in Aztec society, a sculpture of a reclining human figure with a tray on its lap, used to hold sacrificial offerings

charter
a formal document in which a person in authority states that certain rights or responsibilities are granted to others

chinampas
in Aztec society, human-made floating islands used for agriculture

chivalry
polite and kind behaviour that shows a sense of honour, especially by men towards women

chronicle
a detailed narrative on an event

chronological order
the order in which events have taken place

chronology
a record of events in the order they took place

circa
a Latin word meaning 'around' or 'approximately' (abbreviated as *c.*)

city-state
an independent settlement made up of an inner fortified city surrounded by houses; this built centre was surrounded by farmland that supported (e.g. with food) the urban centre; during the Renaissance period, a region ruled independently by a major city

clan
a group of people linked and united in their aims and behaviours by the knowledge (or a belief) that they share common ancestors

clergy
the priests or ministers of a religion, especially the Christian Church

coat of arms
a design or shield that is a special symbol of a family, city or other organisation

codex
a bound ancient manuscript, similar to a book

commission
to order and provide financial support for the creation of a work of art, building, etc.

communes
medieval towns with local governance and an oath binding them to a larger empire for mutual protection

concubines
women kept for the entertainment and pleasure of a ruler or emperor

conquistador
(pronounced con-kees-ta-dor) a Spanish word for a soldier or conqueror

constitution
the political principles on which a country or society is based and that guide its government; also, a written document that outlines these principles

contestability
the state of an interpretation being open to debate, because of a lack of evidence or understanding from a different perspective

continuity and change
the state of remaining the same over time, and the state of progress or decline

Crusades
a series of wars fought by Christians and Muslims between 1096 and 1291 CE over control of the Holy Land

D

daimyo
a feudal lord of Japan who was a large landowner, and offered his loyalty and service to the shogun

Danelaw
an area in north-west England (which includes the city of York) that the King of Wessex gave to the Vikings in exchange for their stopping raids of the region

decade
a period of 10 years

deel
traditional Mongolian clothing, usually made of cotton, wool or silk

deforestation
the action of clearing a wide area of trees

delta
an area of flat, low land, where a river approaches the sea and empties into it

devsirme
the practice of taking boys from non-Muslim families, converting them to Islam and training them for military or civil service in the Ottoman Empire

disenfranchise
to take away somebody's rights, especially their right to vote

dowry
money and/or property that, in some societies, a wife or her family must pay to her husband when they get married

dynasty
a period of rule by successive members of one extended family

E

empathy
appreciation of the circumstances people faced in the past, and the motivations, values and attitudes behind their actions; empathy is what brings history to life; it connects us as human beings, regardless of how much time has passed

emperor
someone who rules an empire; an empire is a group of countries or areas often speaking different languages and having different cultures, but centrally ruled

Enlightenment
a school of French-inspired thinking that spread through Europe in the eighteenth century; its view was that reason, tolerance and equality should replace superstition, cruelty and injustice

era
a period of time marked by distinctive characteristics, events or circumstances (e.g. the Roman era, the Victorian era)

erosion
the wearing away of the Earth's surface by water, wind and ice

eunuchs
slaves who had been castrated by having their testicles removed; eunuchs had many responsibilities in the Ottoman Empire

evidence
information provided by a source that supports a given interpretation, or provides support for possible answers to inquiry questions

excommunication
a religious punishment that involved cutting someone off from being part of the church community and all that this entailed from a spiritual point of view (e.g. being able to participate in communion and confession, and gaining entry to heaven)

exiled
expelled from one's place of birth, usually for political reasons

F

'femme fatale'
a beautiful woman whom men find attractive, but who brings them trouble or unhappiness

feudalism
a set of legal and military customs that served to organise the society of medieval Europe and Japan; under feudalism, a lord (in Japan, a *daimyo*) gave a fief (parcel of land) to a person (called a vassal) in exchange for service and loyalty

finite
a definite limit or fixed size

flagellants
a group of radical Christians who, during the Black Death, whipped themselves to gain God's forgiveness for their sins

G

geisha
a Japanese woman trained to entertain men with conversation, dancing and singing

guilds
groups of people all working in the same trade (e.g. butchers, tailors, cobblers) who band together in support of their common interests

H

harem
during the Ottoman Empire, the separate part of a Muslim household reserved for wives, concubines and female servants

hereditary
inherited; passed down from one generation to another

heresy
doing or saying something regarded by the medieval Catholic Church (and by some other faiths) as being in serious conflict with its teachings

hierarchy
a social structure that organises people with the most important group on top and others ranked beneath in decreasing order of importance

Holy Land
territory in the Middle East (now mostly made up of Israel and Palestine) that is important to the Christian, Jewish and Muslim religions

humanism
a group of philosophies centred on the importance of human beings, values and evidence, rather than religion, gods and supernatural matters

humours
four liquids – blood, phlegm, yellow bile and black bile – that were thought in the past to influence a person's health and character

hypothesis
a considered theory or statement, based on research and evidence, about something that has not been proven (plural: hypotheses)

I

ice age
a cooler period in the Earth's history when ice covered much of the northern hemisphere and sea levels were much lower than they are today

Indianisation
the spread of culture, traditions and spiritual beliefs beyond their traditional home in India to other countries around the world

indulgence
a way that Catholics could shorten their time in purgatory and gain quicker entry to heaven

Industrial Revolution
a period driven by the development of steam power, where new methods of transport and production changed the way people worked and lived

infamous
widely known for negative reasons

infrastructure
bridges, roads and public buildings

J

jarls
the nobles of Viking society

jesters
medieval comedians who joked and 'played the fool' at occasions such as banquets and fairs; they typically wore a multi-pronged floppy hat with bells on it

jury
a group of people who are required to decide on a 'guilty' or 'not guilty' verdict in a court case

K

Kamikaze (pronounced ka-mee-ka-zee) a Japanese term meaning 'divine wind'; a name given to the storms that saved the Japanese from Mongol invasion in the thirteenth century; during World War II, Japanese pilots who deliberately crashed their planes into Allied ships were called kamikaze

karls
in Viking society, the social class of farmers, merchants and craftsmen

khan
the title given to a leader of a Mongolian community (and, during the thirteenth century, to the head of the Mongol Empire)

khanate
a region (similar to a state or territory) of the Mongol Empire; the Mongol Empire eventually split into four khanates, each administered by a different khan (leader)

kimono
a long, loose Japanese robe with wide sleeves worn as an outer garment; it has a wide belt and is often elaborately decorated; 'kimono' means 'thing to wear'

kingdoms
regions ruled by a king or queen

knights
warriors in medieval Europe

kumis
a fermented dairy product, usually made from the milk of a horse or donkey

L

lineage
the series of families that a person comes from

longhouses
Viking houses, characterised by their long shape, often built into mounds of earth; they sheltered the extended family and their animals

longships
types of ships used by the Vikings to transport warriors on attack-and-raid missions; longships had shallow hulls, making them speedy and easy to manoeuvre, and they were often decorated with mythical creatures

loot
stolen property taken during a violent event

lords
wealthy nobles under the system of feudalism

M

manuscript
in the medieval sense, a document written by hand (usually by monks)

mass
an act of worship in the Catholic Church

medieval period
another name for the Middle Ages of European history

Meiji restoration
a period in Japanese history from 1868 to 1912 when the last shogun was overthrown and the emperor regained control over Japan; during this time, Japan underwent a period of rapid modernisation and formed a strong central government

mercantile
connected with trade, merchants and commercial or business affairs

midden
a deposit of waste containing shells, animal bones and other refuse that indicates the site of a human settlement

millennium
a period of 1000 years

***millet* system**
a special legal system in the Ottoman Empire that allowed non-Muslims communities to use their own laws and largely govern themselves

minstrels
medieval singers and musicians who typically wandered around the countryside performing at events (often as part of a small group)

moai
huge human figures created from a single block of stone, present on Rapa Nui (Easter Island) in Polynesia

moat
a wide band of water surrounding a built structure such as a castle; it provided some protection in the event of attack

monastery
a place where monks live, worship and work

monsoons
seasonal heavy rainfall that affects the climate of a large area of Asia

morbidity
the number of people in a population who have a particular disease

mortality rate
a measure of the number of deaths in a particular population

N

New Spain
claimed Spanish territory during the colonisation of the Americas (1521–1821), including parts of North and South America, as well as some Pacific Islands

New World
a term that started being used by Europeans in the late 1400s for the new lands (the Americas) being discovered

nomadic
a society of people who do not live in a set place but move around, usually in search of food and shelter, and good pasture for their animals

O

'Out of Africa'
one model in the theory of how modern humans spread around the world; it hypothesises that modern humans developed in Africa before migrating outwards

outrigger
a wooden structure that is fixed to the side of a boat or ship in order to keep it steady in the water; 'outrigger' can also refer to a boat fitted with such a structure

P

pagans
a term sometimes used by people of Christian, Muslim and Jewish faiths to describe people who do not share their beliefs

palanquin
a covered carriage or fort, consisting of a large box, usually carried on horizontal poles by a number of bearers

pandemic
a term used to describe the spread of an infectious disease across an entire country, a large region, or even the whole world

patriotism
love of one's country and the desire to defend it

patron
a person someone who devotes some of their wealth, time and interest to developing the skills of others (usually in the arts)

perspective
a new approach to painting developed during the Renaissance, which involved making objects larger in the foreground and smaller in the background to suggest distance

perspectives
a point of view about an event or issue; a person's perspective is often influenced by their knowledge, culture or beliefs

plague
a widespread disease with a high death rate

plundering
stealing, often using violent force

polytheism
the belief in or worship of more than one god

pre-Columbian
a term used to describe the period in the Americas before the arrival of Christopher Columbus and the Spanish

prehistory
the period of history before written records

primary source
a source that existed or was made at the time in the past being studied

Protestant
a member of one of the new Christian Churches that developed during the Reformation

purgatory
a place where Catholics believed their souls had to suffer for a time, before they were cleansed and pure enough to enter heaven

Q

quarantine
a period of time when an animal or a person that has – or may have – a disease is kept away from others in order to prevent the disease from spreading

R

Reformation
a movement that began in Europe in the sixteenth century when the scholar-monk Martin Luther publicly challenged the Catholic Church; it shifted the balance of power in Europe away from dominant control by the Church

regent
a person who rules in place of a monarch who is temporarily absent from the country (e.g. fighting a war) or who is too young or sick to rule

Renaissance
a period in Europe's history between the late twelfth and sixteenth centuries that saw a revival of culture and learning; a French term meaning 'rebirth'

republic
a system of government in which the power lies with a group of elected officials rather than a king or queen

reservoir
a large body of water (such as a natural or artificial lake) that is used as a supply of fresh water

S

sagas
long stories (sometimes mixed with poetry) about heroes who achieved great things and fought noble battles; often a mix of real events, legends and myths

sakoku
the name given to Japan's foreign policy during the Edo period that forbade any Japanese person from leaving Japan, or any foreigner from entering it; the penalty for disobeying was death

samurai
a Japanese medieval warrior; the word 'samurai' means 'one who serves'

sand bars
long, narrow banks of sand, especially at the mouth of a river

Sanskrit
an ancient language of India and the language used in documenting the holy books of Hinduism

Scientific Revolution
a change in thinking among sixteenth- and seventeenth-century European scholars (academics) that placed a new focus on the laws of science and the natural world rather than the spiritual world

secondary source
a source created after the time being studied

secular
not connected to religious or spiritual matters

seppuku
a form of ritual suicide common among Japanese samurai who felt they had been dishonoured; this involved self-disembowelling (cutting open the belly)

serf
a peasant who was forced to live and work on land that belonged to a landowner, whom they had to obey

shogun
a chief military commander of Japan between the twelfth and nineteenth centuries; shoguns dictated how the country would be ruled; their positions became hereditary during the Ieyasu shogunate

siege
a military strategy to weaken an area by cutting it off from the outside world

significance
the importance given to a particular historical event, person, etc.

Silk Road
a network of trade routes stretching west from China to the Mediterranean Sea; it was the main means by which silk was introduced to the West

smelters
places where metal is extracted from its ore by a process that involves heating and melting

society
a group of people who organise themselves to best survive in their environment

steppe
a large stretch of grassland (without trees), typically found in places such as Siberia and Mongolia

successor
a person or thing that comes after another

sultan
the ultimate ruler of the Ottoman Empire; he exercised complete political, military, religious, judicial and social control

T

tariff
a tax (usually applied to goods being imported or exported)

Tatars
members of an ethnic group whose members can be found today in countries such as Turkey, Uzbekistan, Kazakhstan, Ukraine and Azerbaijan

thing
in Viking society, a gathering or assembly that determined laws

thralls
in Viking society, the social class of slaves, prisoners of war and criminals

time period
a block of time in history

timeline
a sequence of related historical events shown in chronological order; a timeline is generally scaled, with years marked at equal distances

tithe
a tenth of the goods that a person produced, or the money that they earned, which was paid as a tax to support the Church

tournament
a public event held in medieval Europe, similar to a fair or carnival; tournaments featured organised battles and a series of jousts between knights on horseback

treason
the act of betraying one's own country or ruler

tribute
something given as a mark of respect to someone important

V

vagabond
a person who has no home or job and who wanders from place to place

value
a quality of character that a society or community regards highly, e.g. an important Australian value is freedom; a traditional Japanese value is honour

vassals
people who offered their loyalty and service to a lord in return for his protection and the granting of land

W

waka
a Māori canoe; it can be small and used for fishing, or large and used for war

warlord
someone who both rules a society (or community) and heads up its military operations

Y

yam
a communication system that covered all regions of the Mongol Empire; stations were set up to provide food, shelter and horses to messengers in this system

year
a period of 365 days

yurt
a Mongolian circular tent, with a wooden frame and felt walls

Glossary: Economics and business

A

audit
a detailed investigation and check of whether the records of a business are accurate

B

business
an activity that involves making goods or providing services in exchange for money

C

colonies
the continent of Australia was divided up into six colonies whereby the British Empire ruled and administered British settlements.

competitive advantage
when a business is able to produce better or cheaper products and outperform other businesses

competitors
rival businesses that make products in the same market

consumers
people who buy things to use

cost–benefit analysis
an estimate of what will need to be paid (cost) and the possible profits (benefit) derived from a business proposal

customer satisfaction
how happy or satisfied a customer is with their experience of dealing with a business

D

developed country
a country with a well-developed economy and a relatively high standard of living that is able to support the needs of its citizens

developing country
a less economically developed country that has some difficulties in supporting the needs of its people

direct action
forms of public protest – such as demonstrations, boycotts and strikes – that seek to raise awareness about issues and to influence decisions made by elected representatives; also known as non-violent resistance

E

economics
the study of how people and society choose to use limited resources to satisfy their needs and wants

economist
a person who studies the relationship between the resources that society has and what it is able to produce

economy
a system that involves the production, distribution, trade and consumption of goods and services by individuals, businesses, organisations or governments

employees
people who work for a business

employment
having a job that returns an income for the work provided

entrepreneur
a person who starts a business or independent organisation, takes risks and uses initiative to achieve success

ethical consumers
people who make an effort to purchase goods and services that do not have a negative impact on other people, animals or the environment

G

goods and services
products made for consumers; goods are tangible products that can be touched, such as bread; services are intangible products that cannot be touched but benefit the consumer in some way, such as tutoring

I

income
the money paid to an individual (or business) in exchange for their labour, or for providing a service, or for producing goods

interest
the amount of money a person has to pay a lender in addition to the original amount borrowed

investing
putting money into shares, property or other financial schemes in the hope of making a profit

L

labour market
the supply of and demand for labour; also known as the job market

living standards
the level of wealth, material goods and comfort available to people

M

manufacturer
a business that produces goods and sells them to retail businesses; these retail businesses then sell the goods to the end customer

market
where buyers and sellers interact to exchange money for goods and services

marketing
promoting the buying or selling of products

O

opportunity cost
what we miss out on when making a choice

outsourced
to have obtained goods and services from outside suppliers to reduce costs

P

producers
people or businesses that make and sell goods and services for a profit

product
an item (either a good or service) that is offered for sale

product safety recall
when a business must notify consumers and organise for a faulty or dangerous product to be returned to the business

profit
the amount of money a business earns after taking away the expenses that it has to pay

R

revenue
the total amount of income generated by the sale of goods or services

S

self-esteem
the opinion a person has about themselves or how they feel about themselves

social responsibility
the duty to conduct business in a manner that benefits the community and the environment

strategy
a plan for achieving goals

strike
a refusal to work as a form of protest until something is done to address the workers' concerns

superannuation
money paid regularly into a fund that cannot be accessed until retirement

survey
a series of questions that are asked to a group of people to gather information about what most people think

W

wage
an amount of money that an employee is paid based on the work that they provide

work
a job that returns income for the tasks provided; the tasks or activities done in the course of a job

workers' unions
organised associations of workers that are formed to protect and further the workers' rights, interests and working conditions

workforce
the group of people who are employed

work–life balance
the relationship between a person's work and lifestyle, and the impact they have on each other

Glossary: Civics and citizenship

A

Australian Constitution
a written set of rules and principles that guide the way Australian is governed

B

balance of probabilities
the standard of proof in civil disputes; for a plaintiff to be successful, they must establish that it is more probable (i.e. likely) than not that their version of the facts is correct

beyond reasonable doubt
the standard of proof in a criminal trial; the judge or jury must be satisfied that there is no 'reasonable doubt' before finding an accused guilty

bill
a proposed law that has not been passed by both houses of parliament

burden of proof
the legal duty of a party to prove or disprove a disputed fact

C

citizen
a person who legally lives in a geographical area, such as a town or country

citizenship
a person's status as a citizen; in a wider context, citizenship encompasses citizens' rights and responsibilities

civil law
an area of law that defines the rights and responsibilities of individuals, groups and organisations, and regulates private disputes

codification
when parliament creates a statute based on a precedent set by a judge

common law
law that is created by the courts when a judge makes a ruling about a case; also referred to as a precedent, because it sets a standard for all future judges to refer to when deciding a case

Commonwealth
the title of the federated states and territories of Australia; can also refer to the association of nations that previously made up the British Empire

constitutional monarchy
a system of government in which a country is ruled by a king or queen, whose power is limited by a constitution

constituent
a person living in an area that has elected someone to act as a political representative

crime
an act that breaks an existing law, is harmful to an individual or to society as a whole, and is punishable by law

customary law
rules, customs and traditions upheld by Aboriginal and Torres Strait Islander peoples

D

damages
an amount of money that a court orders one party to pay to another party to compensate the wronged party for the loss they have suffered; damages are the most common remedy in civil law cases

democracy
a system of government where each citizen has an equal right to influence the political decisions that affect their society

discrimination
treating someone differently because of their race, sex or any other group to which the person may belong

Dreaming
a belief system at the centre of all Aboriginal and Torres Strait Islander cultures, giving meaning to everything – including creation, spirituality, family, the land and the law

E

Elder
a key person and keeper of cultural and spiritual knowledge within Aboriginal and Torres Strait Islander communities

electoral roll
the official list of all those who are entitled to vote in an election

electorate
a geographical area containing a specified number of people who can vote in an election

executive
the administrative arm of government, which puts the law into action; in Australia, this role is fulfilled at the federal level by the governor-general, prime minister, senior ministers and government departments

F

federal
relating to the central government of the Commonwealth of Australia

G

government
the elected members of parliament who make decisions for a nation or state; the government is made up of the party or coalition that has won a majority of seats in the lower house of parliament

I

indictable offence
a serious criminal offence that is usually heard by a judge and jury

J

judiciary
the judicial arm of government, which interprets and applies the laws made by parliament; in Australia, this role is fulfilled at the federal level by the High Court and other federal courts

jury
a group of people who are required to decide on a 'guilty' or 'not guilty' verdict for a case

L

laws
formal rules that are designed to govern the way in which people behave so that we can all live together in one peaceful and united society

legislature
the law-making arm of government; in Australia, this role is fulfilled by parliament

lobbying
making requests to politicians or public groups to try to influence the government to change the law

M

multiculturalism
the idea that people of many different cultures, races and religions can live peacefully with one another as equals

P

parliament
the organisation that makes the laws in a country, often with a lower house to draft laws and an upper house to review the proposed laws; in Australia, the Queen's representative (the governor-general) is also part of parliament and officially creates the laws

petition
a collection of signatures that identify people who share a stance on a particular issue

precedent
a previous case or example that is used as a guide for decision making when similar circumstances arise

prime minister
the leader of the party that forms the government

prosecutor
a legal professional such as a lawyer who is responsible for conducting a case against a defendant

R

referendum
a national vote to change the wording of the Australian Constitution

representative democracy
a system of government in which the people elect members of parliament to make laws and manage the country on their behalf

republic
a system of government in which the power lies with a group of elected officials rather than a king or queen

royal assent
approval given by the governor-general (as the Queen's representative) for a bill to become official law

rule of law
the idea that everyone is equal before the law, regardless of their power or status in society

S

simple offence
a less serious criminal offence that is usually heard by a magistrate; also called a summary offence

statute law
law that is made by parliament; also called statute, legislation, Act of Parliament or statutory law

INDEX

A

Aboriginal and Torres Strait Islander peoples
- and the Constitution 472, 474
- cultural and spiritual values 44, 46–7, 75
- customary law 496–7
- impact of international migrants on 192–3

Age of Exploration 412
American cities 132, 149–51, 152–4, 155–7, 158–9
Anak Krakatau eruption, Indonesia 80
anatomical studies 406, 407
Anglo-Saxon period 280, 281
annotated visual display (AVD) 34–5
arches 94, 99
archipelagos 43
architecture, medieval Europe 290, 304–5
armour 229, 244, 300, 301, 356
artificial intelligence (AI) 446–7
ash 60, 78, 81, 83
Ashikaga shogunate 346, 347
asking questions and conducting research 13, 203–5, 257, 344–5, 423, 435, 448–9, 451, 463–4, 489
astronomy 406, 407
atolls 43
audiovisual presentation, creating and delivering 389
Australia
- international migration to 184–5
- as multicultural nation 139, 185–9
- population density and distribution 144, 160–1, 162–5, 174–5
- spiritual value 44, 46–7
- tourism 50–1
- trade and transport networks 148
- workers in 452–4

Australian citizens 184, 476–7
Australian Constitution 470–1, 472–3, 474–5, 490, 492
Australia's cities 144
- climate zones 146, 147
- growth 145
- migrant communities in 190–1
- population predictions 160

Australia's legal system
- common law 490–1
- court hierarchy 471, 491
- and Magna Carta 488
- principles 486–7
- statute law 492–4
- types of law 495–7

avalanches 88

B

balance of probabilities 496
banking 302
barbarian raiders 238, 264
Battle of Hastings 214–15, 245, 252, 281
Battle of Sekigahara 350
battlements 297, 299
Bayeux Tapestry 203, 215, 245, 281
BCE (Before the Common Era) 206
beaches 43, 94, 95, 100, 104–5, 107, 110, 111, 116–17
berserkers 246
bills 471, 492–4, 499
bishops 267, 284
Black Death 208, 209, 210–11, 306–22, 384
blogs 204, 464
bloodletting 200, 311
blowholes 98
blowout dunes 100
BOLTSS 16, 33
'boom and bust' cycle 177
Britain, Vikings in 251–2, 252–3
bubonic plague 209, 306, 308
Buddhism 340, 348, 366, 367
burden of proof 487
bushido code 256
businesses 427, 428–41
- impact of COVID-19 pandemic 453
- laws affecting Australian workplaces 453, 454

buttes 43
Byzantine Empire 286

C

Canberra 147, 166–7
castles (medieval Europe) 296, 297, 298–9
castles (Shogunate Japan) 358–9
Catholic Church
- challengers to the 408–9
- corruption 408
- and Henry VIII, King 410
- medieval Europe 274, 280, 282–3, 284–7, 291, 304–5
- as patron of the arts 404
- and scientific thinkers 406, 407
- weakening following Black Death 317, 320, 384

cause and effect 200, 208–9
caves 94, 98
CE (Common Era) 206
census 160, 265
change 10–11, 37, 95
Charlemagne 280, 282–3
Chartres Cathedral, France 304
children 227, 391, 392, 393, 450
China
- economic growth 178, 180–1, 182, 183
- and freedom of speech in Hong Kong 483
- *hukou* (household registration system) 181
- as origin of Black Death 308
- population movements 178–81
- rural and urban life 178

choropleth maps 23, 61, 143
Christianity 249, 284–7, 351, 362, 363
Christians 285–7, 312–13, 322
chronology 200, 206
cirques 43, 62
cities 130–1, 138–9, 140–1, 144–8, 149–51, *see also* megacities
citizenship 184, 467, 472, 476–7, 478–9
civil law 487, 495, 496
clan system, Japan 339, 340
cliffs 43, 98, 102–3
climate change 49, 71–3, 116, 479
climate zones 146, 147, 152, 154
coastal landscapes 40, 43, 92–127
Code of Chivalry 300–1
Code of Hammurabi 501
collecting and representing data 28–32, 50–1, 89, 138, 159, 177, 489
Columbus, Christopher 412
commerce 302, 394
common law 294, 490, 492
Commonwealth courts 471, 491
communicating and reflecting 33–7, 218–19, 323, 357, 389, 427, 439, 467, 481
concept maps 30, 439
conducting fieldwork 14, 104–5, 114–15, 124–5
Confucianism 340
Constantinople 286, 308, 385
constitutional monarchy 472
constructive waves 96, 100, 101
consumers 427, 450
contestability 215, 393
continuity and change 200, 210–11, 233, 237, 297, 353
contour lines 24, 76–7, 89
coral reefs 43
cost-benefit analysis 427
courts 292–3, 471, 487, 490, 491
COVID-19 pandemic 160, 161, 162, 175, 210–11, 322, 433, 446, 453, 457
craftspeople 228, 232, 238, 353
crime 140, 486
crime and punishment (Australia) 495
crime and punishment (medieval Europe) 292–5, 488
crime and punishment (Vikings) 233
criminal trial 487
cross-sections 64–5, 89
the Crusades 285–7, 387
crust 58, 78
culture
  city-states of Renaissance Italy 387
  diversity in Australia 186
  Edo period, Japan 366–8
  Florence 394
  medieval Europe 290–1
  Northern Renaissance 410–11

D

daimyo 347, 349, 350, 353, 356, 357, 358, 362, 365, 369, 375
DAMMIT U (source analysis) 216–17, 360–1
Danelaw 252–3, 280
data 28, 29–32, 423, 424
decentralisation 162, 164–5, 166–7
deforestation 69, 364
Delhi, as megacity 133
deltas 43
democracy 466–7, 468–82, *see also* Australian Constitution
deposition 94, 100–1, 112
descriptions, writing 218, 357
desert landscapes 41, 43
design cycle 504–5, 508–9
destructive waves 96, 98, 102
developing countries 68, 447, 450
developing questions and researching 423, 451, 463
discounts 445
discrimination laws 453
District Courts 491
diverging plates 56
Domesday Book 265
double majority 472
drainage basin 43
drawbridges 276, 299
dredging 110
dungeons 277

E

Early Renaissance 412
earthquakes 58, 119, 120–3
Earth's landscapes 40–1, 42–3
economics 27, 138, 140, 427
economy
  Australian 452
  China 178, 182, 183
  Vikings 234
ecosystems 49
Edo period 346, 351, 354, 355, 356
  agricultural development 365
  culture and the arts 366–8
  development of Edo (Tokyo) 364
  environmental management 364–5
  foreign policy changes 362–3
Edward the Confessor 280, 281
elections 478
electoral roll 472
emperors, Japan 334, 340–3, 346, 347, 350, 353
employees 424, 436
employers 436
endangered species 72–3, 74–5, 111
energy-efficient housing (STEAM project) 502–5
English Renaissance 410–11
entertainment, medieval Europe 270, 271, 274–5, 296
entrepreneurs 427, 431–5
erosion 41, 62, 68, 69, 94, 95, 98, 103, 112
  coastal 104, 116–17
erosional landforms 94, 98–9
estuaries 43
ethical consumers 450
Eurasian Plate 80, 83
evaluating alternatives 425–6
evaluating and decision making 466, 474–5, 499
evidence 201, 244, 303, 307
  integrating into explanations 247
  in oral histories 275
examining past trends (urban growth predictions) 160
exports 108–9, 137, 148, 176, 177

F

Family Court of Australia 471, 491
family migrants 187, 188
farming 66, 68–70, 73, 107, 229, 231
fault-block mountains 59, 74
federal courts 471, 491
federal parliament 492–4
feudalism 209, 264–9, 281, 287, 295, 302, 319–20, 341, 352–3
fieldwork 14, 104–5, 114–15, 124–5
First Crusade 286–7
Florence *see* Republic of Florence
fold mountains 59, 74
food 66, 231, 270
food insecurity 137
forced migrants to Australia 187, 188–9
forest management, Shogunate Japan 364–5
freedoms 476, 477, 483
Fujiwara clan 346

G

Galileo Galilei 406–7
garderobe (toilet) 274, 277, 303
gas and oil, offshore 106
gas exports 108–9
geishas 354–5
geographical inquiry 13, 33, 37
geographical images, interpreting 15, 53, 71, 122, 166–7
ghost nets 110–11, 112–13
glaciers 41, 43, 62, 63, 71, 91
goals 430–1, 448–9
gods, Vikings 236–7
gorges 43, 98
government 467, 470
governor-general 471, 494
grandi 390, 395

graphs 29, 31–2, 50–1, 159, 194–5, 455
Great Barrier Reef World Heritage
Area 108
Greenland 254, 255
guilds 302, 394, 395
Gutenberg, Johannes 291, 385

H

hanging valleys 62
headlands 43, 94, 99
Heian period (794–1185 CE) 341–2, 360–1
Heian-Kyo (Kyoto), Japan 341–2, 346
Henry II, King, changes to justice
system 294
Henry VIII, King 410, 411
heresy 293, 406, 407
Hideyoshi, Toyotomi (shogun) 346, 349,
350, 351
High Court of Australia 471, 491
High Renaissance 412
Himeji Castle, Japan 358–9
Holy Land 285, 286, 387
Holy Roman Emperors 283
horizontal eruptions 78
hot spots 56, 60
House of Representatives (lower
house) 470, 471, 492
houses of parliament 470–1, 492–3
housing 134; 230–1, 273–5
hukou (household registration system),
China 181
humanism 400, 403, 415
humanitarian migrants 187, 189
hydroelectricity 66, 71
hypothesis 203

I

ice ages 63
ice sheets 41
Ieyasu, Tokugawa (shogun) 349–51,
362–3, 375
Imperial Court, Japan 341–2, 346, 347,
360–1, 370
income 427, 444, 445
Indian Ocean earthquake and tsunami
(2004) 121–3
Indo-Australian Plate 80, 83
Indonesia 80–3, 121, 122, 134–5,
136–7, 142
Industrial Revolution 153
infrastructure 130, 137, 148
inner core 58
interconnection 8, 87, 108
internal migration 172, 174–5, 178–81, 183
internally displaced persons (IDPs) 172
international migration 172–3
  impact on Aboriginal and Torres Strait
  Islander peoples 192–3
  to Australia 184–5
investing 427
iron ore 176, 177
isthmus 43

J

jade industry 86, 87
Jakarta, Indonesia 134–5
Japan
  agricultural development 365
  and arrival of Matthew Perry 369
  centralised government 340–1
  changes in culture and the arts
  366–8
  Christian missionaries 362
  clan system 339, 340
  earliest settlers 338–9
  earthquake and tsunami (2011) 120
  Edo period 346, 351, 354, 355, 356,
  362–8
  environmental management 364–5
  emperors 334, 340–3, 346, 347, 350, 353,
  369–70
  feudalism 341, 352
  geisha culture 354–5
  geography 338
  Heian period 341–2, 360–1
  Imperial Court 341–2, 346, 347, 360–1,
  370
  industrialisation and trade 351, 362,
  363, 369, 370
  marriage and everyday life for the higher
  classes 354
  Mongol invasions 348
  Meiji restoration 369–70
  policy of isolation 363, 369
  religious beliefs 339, 340, 344–5, 351
  samurai 342, 348, 353, 356–7
  Japan under the shoguns 334–5,
  346–75
  social structure 352–3
  towns and castles 358–9, 364
  warfare 356–7
  women's role 354–5
  Yamato rulers 340
jarls, Viking society 227, 241, 248
Jerusalem 285, 286
Jinbara people 46, 47
judges 490, 491
judiciary 470, 471
jury 294, 486, 495

K

Kamakura shogunate 346, 348
kamikaze 348
Kammu, Emperor 341, 342–3
kampongs 134, 135
karls, Viking society 227, 228
Kingdom of Naples 386, 387, 388
kings 226, 241, 266, 267, 294–5, 488
knights 265, 267, 293, 296 300–1
Kokoda Track, PNG 64, 65
Kotoku, Emperor 340–1

L

labour market 446
Lagos, Nigeria 130
lakes 43
landscapes and landforms 40–1, 43
  human impacts on 48–9
  value 44–5
landslides 84–5, 86–7
  see also avalanches
Late Renaissance 412
lava 60, 78, 81
laws
  affecting Australian workplaces
  445, 453
  Code of Hammurabi 501
  different types of 495–7
  enforcement, medieval Europe 292
  hierarchy in Australia 490, 492
  medieval Europe 292–5
  Vikings 233
  see also Australian Constitution; common
  law; statute law
Lee's migration model 136
legal system in Australia 486–7, 495–7
legislature 470–1
Leif Ericson 254–5
Leonardo da Vinci 394, 404, 407, 410,
413, 415
Lima, as megacity 133
living conditions, medieval Europe
273–5, 303
longshore drift 100, 101, 104, 117
lords of the manor 264, 266, 267, 274
lower classes, Renaissance Italy 391, 392
lower house (House of
Representatives) 470, 471, 492
Lutheran Church 409

M

Magistrate Courts 491
magma 56, 78
Magna Carta 294–5, 488
mantle 56, 58, 78, 83
maps 16–25
  drawing conclusions from 182–3
  reading complex maps 192–3
marketing 426, 447
marriage 354, 392–3
Marriage Law 1961 (Cth), 2017 amendments
to 492–4
martial arts 367–8
mass burials 314, 317
Medici family 395, 396–7, 404

medieval Europe 260–325
  art, literature and music 290–1, 304–5, 402
  architecture 290
  castles 276–7, 296, 297, 298–9
  Catholic Church 274, 280, 282–3, 284–7, 291, 304–5
  commerce 302
  crime and punishment 292–5
  the Crusades 285–7
  cultural developments 290–1
  daily life 270–2
  entertainment 270, 271, 274–5, 296
  feudalism 264–9
  key social groups 266–7
  knights and soldiers 267, 293, 296, 300–1
  living conditions 273–5, 303
  sanitation 303
  town and city development 302–3
  warfare 296–301
  women's role 278–9
megacities 130, 132–3
  Jakarta 134–5
  New York 132, 155–7
megalopolis 149, 180
Meiji restoration 369–70
Melbourne 147, 161, 190–1
merchants
  medieval Europe 302
  Shogunate Japan 353
  spread of Black Death 307, 308
  Viking 228, 234
Michelangelo 394, 412
  The Creation of Adam 402
  Pieta 404, 405
  Sistine Chapel in the Vatican 402, 404
  statue of David 395
migrants 172, 173
  in Australia 145, 162, 186–91
migration 170–95
  Australia: net migration 185
  explaining population movements 172–3
  impact on New York City 156–7
  internal 172, 174–5, 178–81, 183
  international 172–3, 184–9
  Lee's model 136
  multiculturalism in Australia through 186
  and urbanisation 136
  world: net migration 173
Minamoto no Yoritomo 346, 347, 352
mineral resources 48, 67, 81, 176, 177
minimum wage 445, 453, 454
monks 284, 304, 384
Mount Tambora eruption, Indonesia 80–3
mountains 40, 43, 54–91
  climate change impact on 71–3
  farming impacts 66, 68–70, 73
  formation of 58–61
  protecting the 74–7
  types of 59–60
  of the world 62–3
multiculturalism 185, 467
  in Australia 139, 186–9
Muromachi period 346, 347
Muslims 285–7, 308, 312
mythology, Vikings 235–6, 237, 259

N

natural gas plants 108, 109
naturalism (art) 403, 412
Nepal, farming 69
net migration 173, 185
New York 132, 155–7
nobles 267, 274, 293, 294
Nobunaga, Oda (shogun) 346, 347, 349
the Normans 280, 281
Northern Renaissance 408–11
Notre Dame cathedral, Paris 290

O

occupational health and safety laws 452
oceans 49, 110–11
Odin 236, 237
online sources 204, 464
oral histories 46, 275
outer core 58
outsourcing 447, 450
Owen Stanley Range, PNG 64, 65

P

Pacific Plate 80, 119
Pacific region tsunamis 118, 119
pandemics
  Black Death 210–11, 306, 308–9, 322
  see also COVID-19 pandemic
Papal States 386, 387, 388
parliaments 467, 470–1, 490, 492–3
patrons 394, 404, 411
patterns and relationships, identifying 26–7, 64–5, 76–7, 143
peasants 266, 267, 273, 302, 319, 320, 325, 353, 391
perspectives, analysing 214, 283, 371
petitions 480, 481
The Pillow Book (Sei Shonagon) 360–1
plagiarism 204, 464
plague doctors 310
plate boundaries 56, 119
plundering 226, 248, 300
pneumonic plague 209, 306
points of view 214, 466
pollution, coastal landscapes 110–11
poverty, medieval Europe 270–3
Pope 284, 294, 312
population density 142, 144, 151, 155
population movements
  in Australia 174–5
  in China 178–81
  explaining 172–3
Port Campbell coast, Victoria 98–9, 124–5
portcullis 276, 299
PQE method 26
primary data 28, 29, 33
primary sources 201, 213, 214–15, 239, 305, 399
prime minister 471
printing press, invention of 291, 384–5
profit 427, 430, 444
pyroclastic flows 78, 80, 83

Q

qualifications and experience 445
qualitative and quantitative data 28–9
quarantine 310

R

rainfall 66
reasoning and decision making 425–6
referendums 472, 473, 490
Reformation 320, 408–9
refugees 173, 187, 188–9
relevant sources 204, 205, 423, 464
religions 312–13, 317, 322, 339, 340, 344–5, *see also* Christianity
religious warfare – the Crusades 285–7
Renaissance 321, 384–5, 400–1, 406–7, 412
  see also Northern Renaissance
Renaissance art 402–5, 410
Renaissance Italy 380–415
  city-states 386–7
  education 392
  influence on France and England 410–11
  Italian League 388
  marriage 392–3
  mercantile cities 386
  social structure 390–1
  society in Florence 394–7
  women and children 392–3
representative democracy 467, 472, 478
Republic of Florence 386, 387, 388, 394
  Medici family 395, 396–7
  political power 395–7
  society in 394–7
Republic of Genoa 386
Republic of Siena 386
Republic of Venice 386, 388
republic referendum 472
Richard III, King 275, 288–9
river landscapes 41, 43
rivers 43, 66, 71
rock falls 85

rock walls 104
Roman Empire, collapse of 264
rule of law 486, 488

S

sagas 235, 254
sakoku 363
samurai 342, 348, 353, 356–7, 375
sand 95, 96, 97
sand dunes 94, 95, 100
scale 10, 16, 18–19, 33
sea level rises 116, 135
search engines 204, 464
secondary data 28, 29, 33
secondary sources 201, 213, 214–15
secularism 384, 403
Seljuk Turks 285, 286
Senate (upper house) 470, 471, 484, 492
separation of powers 470–1
serfs 267, 268, 269
SHEEPT method 27
Shenzhen, China 179, 180, 181
Shinto 344–5, 339
shipbuilding 228, 244–5, 412
Shogun Hideyoshi 346, 349, 350, 351
Shogun Ieyasu 349–51, 362–3, 375
Shogun Nobunaga 346, 347, 349
Shogun Yoshinobu 369
shogunates 346–51, 352, 362–3
significance 201, 212, 339, 395
Silk Road 234, 287, 308
sketch maps, drawing 114–15
slave trade 320–1
slums 130, 134, 140, 169
SMART goals 430, 448–9
social media posts 204, 464
social responsibility 436, 437
soil erosion 68, 69
soil fertility 69, 81
solar system 406, 407
source analysis 216–17, 360–1
sources 16
  analysing 213–17, 239, 247, 279, 283, 289, 305, 360–1, 399, 424, 455, 465
  different perspectives, attitudes and values 213–14, 283
  drawing conclusions about usefulness of 215, 289
  finding relevant sources 204
  gathering data and information 423, 463
  origin and purpose 213, 305
  types of 201, 213
  understanding contestability 215
space 7, 118, 149
spiritual value in Australia 44, 46–7
spits 43, 94, 101, 277
stacks 43, 94, 95, 99
statute law 490, 492–3
subduction 56, 60, 83
suburbanisation 145, 162
superannuation 444, 445
Supreme Courts 491
sustainability 9, 70

T

tailings 86
Tasmanian Wilderness World Heritage Area 74–5
technology 447, 506–9
tectonic plates 40, 56–7, 58, 80, 119
TEEL structure 219
terraces 68–9, 81
things, activities at 233
Thor 236, 237
Tokugawa shogunate 346, 349–51, 352, 362, 369
tombolos 94, 101
topographic maps 20, 24, 65
tourism 50–1, 67, 106, 107
tournaments 274, 296
towns 302–3, 316, 358–9, 364
trade 148
  city-states of Renaissance Italy 386, 387
  following the Crusades 287
  Japan under the shoguns 351, 362, 363, 369
  Vikings 234
traffic congestion 140, 142
training walls 112
transport networks 148, 153
trial by jury 294
trial by ordeal 293, 297
trials
  and courts 292–3
  presumption of innocence and burden of proof 487
  right to a fair trial 486
tsunamis 78, 80, 83, 118–20, 121–3
Twelve Apostles, Port Campbell, Victoria 124–5

U

U-shaped valleys 62
unemployment 452
United States 149–50, 151–4
Universal Declaration of Human Rights 297
upper house (Senate) 470, 471, 484, 492
urban growth 160–1, 162–5, 175
urbanisation 130, 136, 137, 142, *see also* cities

V

V-shaped valleys 43
vassals 264, 266
the Vikings 222–59, 280
  beliefs 235–7, 249, 259
  berserkers 246
  Danelaw 252–3, 280
  economy 234, 250
  food and diet 231
  homelands 248, 249, 250, 264
  housing 230–1
  laws 233
  legacy 256
  raids 240–1, 251–3
  settlement in Britain 252–3, 280
  settlement in North America 255
  shipbuilding 228, 244–5
  skills and achievements 242–5
  social classes and roles in society 226–9, 259
  trade 234, 240
  warriors 226, 231, 232, 236, 241–4, 246, 248, 259
  weapons and armour 229, 243–4
  work 228–9, 231–2, 238
  Yule celebrations 256
volcanoes 43, 58, 60, 78–83, 119

W

wages 444, 445, 453, 454
warrior class, Shogunate Japan 346–7, 354, 375, *see also* samurai
warriors, Viking 226, 231, 232, 236, 241–4, 246, 248, 259
Washington DC, growth of 158–9
wave-cut platform 94
waves 95, 96, 98, 100
wealth inequality 137
weapons
  medieval Europe 300
  samurai 356
  Vikings 229, 243–4
William the Conqueror 252, 265, 281, 297
wind 96, 97
women
  medieval Europe 278–9
  Renaissance Italy 392–3
  Shogunate Japan 354–5
  Viking society 227
work 427, 442–57
workplace laws, Australia 453, 454

Y

Yamato rulers 340, 341
Yersinia pestis 306
Yuan Empire 308

Z

Zen Buddhism 348, 366, 367

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Chapter 6: Anjo Kan / Alamy Stock Photo, p. 170 source 1; AHMAD AL-ATRASH/AFP via Getty Images, p. 172 source 1; Magnum Photos/Jonas Bendiksen, p. 172 source 2; Dunrobin Studios / Alamy Stock Photo, p. 175 source 6; Jochen Brood / Alamy Stock Photo, p. 178 source 11; Sean Pavone / Alamy Stock Photo, p. 178 source 9; Imaginechina Limited / Alamy Stock Photo, p. 181 source 14; Yuen Man Cheung / Alamy Stock Photo, p. 182 left; Museum Victoria, p. 184 source 1; National Library of Australia, p. 184 source 2; Chris Jackson/Getty Images, p. 185 source 6(b); Scott Barbour/Getty Images, p. 185 source 6(c); Matt Carr/Getty Images, p. 185 source 6(d); Dunrobin Studios / Alamy Stock Photo, p. 190 source 10; david hancock / Alamy Stock Photo, p. 192 source 12; Shutterstock, p. 188 source 7, p. 188 source 8, p. 189 source 9, p. 192 background.

Chapter 7: Getty Images/AFP, p. 198 source 1; Getty/Universal Images group, p. 200 source 1; Bridgeman, p. 200 source 2(left); D. Callcut / Alamy Stock Photo, p. 200 source 2(right); Martin Bennett / Alamy Stock Photo, p. 203 source 2; Cultura RM / Alamy Stock Photo, p. 204 source 3; World History Archive / Alamy Stock Photo, p. 214 source 19; North Wind Picture Archives / Alamy Stock Photo, p. 215 source 15; Bridgeman, p. 219 source 29; Shutterstock, p. 196, p. 210, p. 201 source 5, p. 202 source 1, p. 207 bottom right, p. 211 source 13, p. 211 source 14, p. 217 top right.

Chapter 8: Shutterstock, p. 8.2 source 1, p. 8.4 bottom, p. 8.6 source 5, p. 8.7 source, p. 8.8 source 9, p. 8.9 source 10.

Chapter 9: Ivy Close Images / Alamy Stock Photo, p. 224 Source 1(b); robertharding / Alamy Stock Photo, p. 225 Source 1(c); FORGET Patrick / Alamy Stock Photo, p. 225 Source 1(d); Shibo Yang / Alamy Stock Photo, p. 226 source 2; OJPHOTOS / Alamy Stock Photo, p. 230 source 9; dpa picture alliance archive / Alamy Stock Photo, p. 231 source 10; Werner Forman/Universal Images Group/ Getty Images, p. 231 source 12(bottom); ©aisa; The Bridgeman Art Library, p. 231 source 12(top); Chronicle / Alamy Stock Photo, p. 235 source 16; Pictorial Press Ltd / Alamy Stock Photo, p. 236 source 18; Bridgeman, p. 238 source 24; Werner Forman/Universal Images Group/Getty Image, p. 238 source 25; © Bertrand Rieger/Hemis/Corbis, p. 240 source 1; Getty Images, p. 241 source 2; SPL, p. 243 source 5; Arctic-Images/Getty Images, p. 244 source 8; AF archive / Alamy Stock Photo, p. 244 source 9; David Noton Photography / Alamy Stock Photo, p. 245 background; Picturenow/Universal Images Group/Getty Images, p. 245 source 10; Bridgeman, p. 246 source 13; Bridgeman, p. 246 source 14; © The Trustees of the British Museum, p. 250 source 4; National Geographic Image Collection / Alamy Stock Photo, p. 255 source 11; All Canada Photos / Alamy Stock Photo, p. 255 source 12; Shutterstock, p. 222 source 1, p. 224 Source 1(a), p. 227 source 4, p. 229 bottom left, p. 233 source 14, p. 242 source 4, p. 256 source 14, p. 256 source 16, p. 258 bottom.

Chapter 10: Valery Egorov / Alamy Stock Photo, p. 260 source 1; Michael Nicholson/ Corbis /Getty Images, p. 262 source 1(b); Niday Picture Library / Alamy Stock Photo, p. 263 source 1(c); Bettmann/Getty Images, p. 263 source 1(d); Bridgeman, p. 265 source 3; Chronicle / Alamy Stock Photo, p. 265 source 4; Pavel Kusmartsev / Alamy Stock Photo, p. 270 source 8; The History Collection / Alamy Stock Photo, p. 271 source 10; Art Library / Alamy Stock Photo, p. 271 source 9; DeAgostini/Getty Images, p. 272 source 11; Hemis / Alamy Stock Photo, p. 274 source 14(left); Franck Fotos / Alamy Stock Photo,

p. 275 source 16; World History Archive / Alamy Stock Photo, p. 278 source 18; The Picture Art Collection / Alamy Stock Photo, p. 278 source 19; Album / Alamy Stock Photo, p. 279 source 20; ASP Religion / Alamy Stock Photo, p. 280 source 1(bottom); Rollo statue, p. 280 source 1(middle); Archive Photos/ Getty Images, p. 280 source 1(top); FORGET Patrick / Alamy Stock Photo, p. 281 source 2; Stefano Bianchetti / Bridgeman Images, p. 283 source 4; Lebrecht Music & Arts / Alamy Stock Photo, p. 284 source 5(a); Ivy Close Images / Alamy Stock Photo, p. 284 source 5(b); Ivy Close Images / Alamy Stock Photo, p. 284 source 5(c); Lanmas / Alamy Stock Photo, p. 284 source 5(e); Florilegius / Alamy Stock Photo, p. 284 source 5(f); Historic Images / Alamy Stock Photo, p. 284 source 5(g); Hortus_Deliciarum_-_Hell, p. 285 source 6; Album / Alamy Stock Photo, p. 285 source 7; World History Archive / Alamy Stock Photo, p. 287 source 10; AAP, p. 288 source 11; Angelo Hornak/Corbis via Getty Images, p. 291 source 3; The Picture Art Collection / Alamy Stock Photo, p. 291 source 4; Album / Alamy Stock Photo, p. 292 source 5; FALKENSTEINFOTO / Alamy Stock Photo, p. 292 source 6; Bridgeman Art Library, p. 293 source 8; Bettmann/Gettty Images, p. 294 source 10; ART Collection / Alamy Stock Photo, p. 294 source 9; Royal Armouries Museum / Alamy Stock Photo, p. 296 source 12; British Museum, p. 300 source 18; Bettmann/Gettty Images, p. 300 source 19; AKG602, p. 302 source 21; GoFrance / Neil Sutherland / Alamy Stock Photo, p. 304 source 26; John Downer/Corbis, p. 306 source 2; SPL, p. 306 source 1; Photo12/UIG/Getty Images, p. 307 source 3; Science Photo Library / Alamy Stock Photo, p. 308 source 5; Charles Walker Collection / Alamy Stock Photo, p. 311 source 8; CPA Media Pte Ltd / Alamy Stock Photo, p. 312 source 9; Bridgeman, p. 313 source 11; Niday Picture Library / Alamy Stock Photo, p. 317 source 14; Science History Images / Alamy Stock Photo, p. 318 source 17; Album / Alamy Stock Photo, p. 319 source 18; Science Photo Library / Alamy Stock Photo, p. 320 source 19; GL Archive / Alamy Stock Photo, p. 321 source 20; Burning, p. 322 source 21; Dipper Historic / Alamy Stock Photo, p. 325 source 24; Shutterstock, p. 262 source 1(a), p. 274 source 13, p. 274 source 14(right), p. 275 source 15, p. 290 source 2, p. 297 source 16, p. 303 source 24, p. 304 source 25, p. 305 source 27, p. 310 source 7, p. 322 bottom left, p. 323 source 23.

Chapter 11: Getty Images, p. 11.0 source 1; Getty Images, p. 11.6 source 4; Shutterstock, p. 11.2 source 2(a), p. 11.5 source 2, p. 11.7 source 6, p. 11.11 source 11, p. 11.12 source 12, p. 11.13 source 13, p. 11.14 source 16, p. 11.15 source 18, p. 11.22 source 8, p. 11.25 source 12, p. 11.18 source 4, p. 11.19 source 3, p. 11.21 source 6, p. 11.24 source 11, p. 11.31 bottom.

Chapter 12: Shutterstock, p. 12.0 source 1, p. 12.4 source 1, p. 12.6 source 3, p. 12.7 source 4, p. 12.8 source 5.

Chapter 13: Chronicle / Alamy Stock Photo, p. 13.3 source 2(d); Hemis / Alamy Stock Photo, p. 13.8 source 7; Pictures Ltd./ Corbis/Getty Images, p. 13.11 source 11; Arcaid Images / Alamy Stock Photo, p. 13.12 source 12; Nissy-KITAQ, p. 13.14 source 16; TANG CHHIN SOTHY/AFP/Getty Images, p. 13.14 source 15; Peter Horree/Alamy Stock Photo, p. 13.17 source 19; National Geographic Society/Corbis, p. 13.18 source 22; Getty Images, p. 13.19 source 24; Luca Tettoni/Corbis, p. 13.19 source 25; Martin Lindsay / Alamy Stock Photo, p. 13.21 source 28; Design Pics Inc / Alamy Stock Photo, p. 13.23 source 33; Design Pics Inc / Alamy Stock Photo, p. 13.26 source 1; Kevin R. Morris/Corbis, p. 13.26 source 2; David Wall / Alamy Stock Photo, p. 13.27 source 4; Design Pics Inc / Alamy Stock Photo, p. 13.33 source 12; Sebastien Lecocq/Alamy Stock Photo, p. 13.36 source 20; Thierry Tronnel/Corbis/Getty Images, p. 13.37 source 21; Thierry Falise/LightRocket via Getty Images, p. 13.38 source 24; Getty Images, p. 13.39 source 25; Macduff Everton/ Corbis, p. 13.41 source 27; Fritz Hoffmann/ In Pictures/Corbis, p. 13.43 source 3; Dreamstime/Biserko, p. 13.45 source 7; Chris Hellier / Alamy Stock Photo, p. 13.46 source 8; Wellcome Library, London. Wellcome Images. Attribution only licence CC BY 4.0. http://creativecommons.org/licenses/by/4.0/, p. 13.46 source 9; Chronicle / Alamy Stock Photo, p. 13.47 source 10; Shutterstock, p. 13.0 source 1, p. 13.2 source 2(a), p. 13.3 source 2(b), (c), p. 13.5 source 4, p. 13.6 source 5, p. 13.9 source 8, p. 13.11 source 10, p. 13.13 source 13, p. 13.15 source 17, p. 13.16, 13.17 bottom, p. 13.17 source 20, p. 13.18 source 23, p. 13.21 source 30, p. 13.22 source 31, p. 13.23 source 33, p. 13.24 source 34, p. 13.26 source 3, p. 13.32 source 9, p. 13.38 source 23, p. 13.38 source 22, p. 13.41 source 28, p. 13.42 source 2, p. 13.43 source 3, p. 13.44 source 4, p. 13.45 source 6.

Chapter 14: Hemis / Alamy Stock Photo, p. 14.39 source 7; Chronicle / Alamy Stock Photo, p. 14.41 source 9; Shutterstock, p. 14.4 source 1, p. 14.6 source 4, p. 14.7 source 6, p. 14.12 bottom left, p. 14.14 source 17, p. 14.15 source 18, p. 14.16 source 20, p. 14.16 source 23, p. 14.21 source 2, p. 14.21 source 3, p. 14.20 source 1, p. 14.22 source 4, p. 14.23 source 6, p. 14.29 bottom, p. 14.38 source 5, p. 14.43 middle right, p. 14.48 source 12.

Chapter 15: MARKA / Alamy Stock Photo, p. 336 source 1(c); Bridgeman, p. 339 source 3; Bridgeman, p. 340 source 4; Kimimasa Mayama - Pool/Getty Images, p. 341 source 5; AKG, p. 342 source 6; Chronicle / Alamy Stock Photo, p. 347 source 2(a); The History Collection / Alamy Stock Photo, p. 347 source 2(b); The Picture Art Collection / Alamy Stock Photo, p. 347 source 2(c); FLHC24 / Alamy Stock Photo, p. 347 source 2(d); Bridgeman, p. 348 source 3; Adam Zayer / Alamy Stock Photo, p. 355 source 13; DeAgostini/Getty Images, p. 356 source 15; Photo12/UIG/Getty Images, p. 357 source 16 (left); Bridgeman, p. 357 source 16 (right); agefotostock / Alamy Stock Photo, p. 361 source 19; Bridgeman, p. 362 source 1; Henry Guttmann Collection/Hulton Archive/ Getty Images, p. 363 source 2; The Picture Art Collection / Alamy Stock Photo, p. 364 source 3; Getty Images, p. 366 source 7; World History Archive / Alamy Stock Photo, p. 369 source 12; Art Archive, p. 369 source 13; Matteo Omied / Alamy Stock Photo, p. 370 source 14; Shutterstock, p. 334 source 1, p. 336 source 1(b), p. 337 source 1(e), p. 344 source 8, p. 351 source 8, p. 354 source 10, p. 361 source 20, p. 367 source 9, p. 368 source 11, p. 372 source 17, p. 372 left.

Chapter 16: All Canada Photos / Alamy Stock Photo, p. 16.0 source 1; University of Auckland, p. 16.2 source 1(a); DeAgostini/ Getty Images, p. 16.2 source 1(b); Agefotostock, p. 16.3 source 1(c); Florilegius / Alamy Stock Photo, p. 16.3 source 1(d); Travel Pix / Alamy Stock Photo, p. 16.4 source 2; Donaleen Shiell / Alamy Stock Photo, p. 16.5 source 4; PRISMA ARCHIVO / Alamy Stock Photo, p. 16.6 source 6; Roland Stockmann / Alamy Stock Photo, p. 16.6 source 7; National Geographic/Getty Images, p. 16.8 source 10; Dreamstime, p. 16.12 source 18; Danita Delimont / Alamy Stock Photo, p. 16.13 source 19; NZ Herald, p. 16.13 source 20; Werner Forman/Universal Images Group/ Getty Images, p. 16.14 source 21; Look and Learn, p. 16.14 source 22; PictureLux / The Hollywood Archive / Alamy Stock Photo, p. 16.15 source 23; Science & Society Picture Library / Getty Images, p. 16.16 source 2; Horizon Images/Motion / Alamy Stock Photo, p. 16.17 source 4; Sawassakoran Mattapraprut/Alamy Stock Photo, p. 16.17 source 3; SPCOLLECTION / Alamy Stock Photo, p. 16.18 source 5; Kevin Fleming/ Corbis, p. 16.20 source 7; Gary Blake / Alamy Stock Photo, p. 16.23 top right; Werner Forman/Universal Images Group/ Getty Images, p. 16.25 source 14; George Steinmetz / Getty Images, p. 16.24 source 13; The Art Archive, p. 16.24 source 11; Sawassakoran Mattapraprut/Alamy Stock Photo, p. 16.26 source 1; Getty Images, p. 16.27 source 2; one-image photography / Alamy Stock Photo, p. 16.27 source 3; The Natural History Museum/Alamy Stock Photo, p. 16.28 source 4; Robert Harding/Alamy Stock Photo, p. 16.30 source 7; Getty Images, p. 16.31 source 10; Alamy/Fort Jackson Leader, p. 16.31 source 9; Bridgeman, p. 16.30 source 8; Getty Images/Stone Sub, p. 16.32

source 14; Nik Wheeler/Corbis, p. 16.33 source 15; Shutterstock, p. 16.5 source 5, p. 16.9 source 13, p. 16.10 source 14, p. 16.10 source 15, p. 16.12 source 17, p. 16.19 bottom left.

Chapter 17: H. Armstrong Roberts/ClassicStock/Getty Images, p. 17.0 source 1; Glasshouse Images / Alamy Stock Photo, p. 17.3 source 3; 123RF, p. 17.6 source 4; De Agostini / Getty Images, p. 17.7 source 5; Album / Alamy Stock Photo, p. 17.9 source 8; Niday Picture Library / Alamy Stock Photo, p. 17.10 source 10; Shutterstock, p. 17.4 source 1, p. 17.5 source 2, p. 17.5 source 3, p. 17.10 source 9, p. 17.11 source 11.

Chapter 18: Imagebroker / Alamy Stock Photo, p. 380 source 1; Keith Corrigan/Alamy Stock Photo, p. 382 source 1(a); GL Archive / Alamy Stock Photo, p. 382 source 1(b); The History Collection / Alamy Stock Photo, p. 382 source 1(c); National Geographic Image Collection / Alamy Stock Photo, p. 383 source 1(d); Keith Corrigan/Alamy Stock Photo, p. 384 source 2; Album / Alamy Stock Photo, p. 385 source 3; AGF Srl / Alamy Stock Photo, p. 385 source 4; Adobe, p. 388 source 8; Archive World / Alamy Stock Photo, p. 388 source 9; AGF Srl / Alamy Stock Photo, p. 390 source 2; Scala, p. 391 source 3; Art Collection 2 / Alamy Stock Photo, p. 391 source 4; The Picture Art Collection / Alamy Stock Photo, p. 396 source 11; Rapp Halour / Alamy Stock Photo, p. 396 source 12; The History Collection / Alamy Stock Photo, p. 397 source 13; DeAgostini/Getty Images, p. 398 source 15; Leemage/Corbis via Getty Images, p. 400 source 1; AF archive / Alamy Stock Photo, p. 405 source 10; DEA PICTURE LIBRARY/De Agostini/Getty Images, p. 407 source 14; Getty Images, p. 407 source 15; Granger Historical Picture Archive / Alamy Stock Photo, p. 409 source 17; incamerastock / Alamy Stock Photo, p. 411 source 20; Shutterstock, p. 388 source 7, p. 394 source 8, p. 394 source 9, p. 395 source 10, p. 402 source 5, p. 402 source 6, p. 403 source 8, p. 405 source 11, p. 410 source 18, p. 411 source 21, p. 412 source 23, p. 413 source 25, p. 415 source 28.

Chapter 19: Shutterstock, 19.5 source 3, 19.6 source 5, 19.6 source 6, 19.7 source 7, 19.14 source 20, 19.17 source 26, 19.17 source 25, 19.23 source 3, 19.25 source 5, 19.25 source 5.

Chapter 20: Noriko Hayashi/Bloomberg/Getty Images, p. 427 source 8; Shutterstock, p. 418, p. 420 source 1, p. 422 source 2, p. 424 source 4, p. 425 source 5, p. 426 source 6.

Chapter 21: Fairfax/Craig Sillitoe, p. 432 source 4; Newspix, p. 437 source 3; Gareth Davies/Getty Images, p. 438 source 4; Sabri Suby, p. 431 source 3; Shutterstock, p. 428 source 1, p. 432 source 5, p. 433 source 6, p. 436 source 1, p. 437 source 2, p. 438 source 6, p. 440 source 8.

Chapter 22: Kim Kulish/Corbis via Getty Images, p. 447 source 6; Zakir Hossain Chowdhury/NurPhoto/Corbis/Getty Images, p. 450 source 1; Lisa Wiltse/Corbis via Getty Images, p. 451 source 2; Michael Dodge/Getty Images, p. 452 source 3; AAP/Julian Smith, p. 454 source 5; Shutterstock, p. 442 source 1, p. 444 source 2, p. 445 source 4, p. 446 source 5, p. 448 source 7, p. 448 source 8, p. 453 source 4, p. 454 background, p. 456 source 7.

Chapter 23: Richard Milnes / Alamy Stock Photo, p. 458; Graham Denholm/Getty Images, p. 466 source 6; Carla Gottgens/Bloomberg via Getty Images, p. 467 source 8; Shutterstock, p. 460 source 1, p. 462 source 1, p. 463 source 2, p. 464 source 3, p. 464 bottom, p. 466 bottom.

Chapter 24: David Gray/Bloomberg/Getty Images, p. 468 source 1; Richard Milnes / Alamy Stock Photo, p. 474 source 6, source 7; Paul Kane - CA/Cricket Australia via Getty Images/Getty Images, p. 476 source 1; AAP, p. 477 source 2; Australian Cycle Alliance, p. 478 source 3; Jenny Evans/Getty Images, p. 479 source 4; Public Records Office, Victoria, p. 481 source 7; DALE DE LA REY/AFP/Getty Images, p. 482 source 8; Shutterstock, p. 483 source 9.

Chapter 25: High Court, p. 486 source 1; Newspix, p. 487 source 2; Science Photo Library / Alamy Stock Photo, p. 488 source 3; IanDagnall Computing / Alamy Stock Photo, p. 488 source 4; AAP/Mick Tsikas, p. 493 source 5(bottom); AAP/Paul Miller, p. 493 source 5(top); AAP/Lukas Coch, p. 494 source 5(bottom); Getty/Michael Masters, p. 494 source 5(middle); Getty/Michael Masters, p. 494 source 5(top); Getty Images, p. 495 source 6; Newspix, p. 496 source 7; Agefotostock, p. 499 source 9; Shutterstock, p. 484 source 1, p. 492 source 2, p. 492 source 3, p. 498 source 8, p. 500 botto, p. 501 source 11.

STEAM project 1: Ivan Smuk / Alamy Stock Photo, p. 502 fig 1.

STEAM project 2: Alex Coppel / Newspix, p. 506 fig 1; Shutterstock, p. 507 fig 2.

WORLD: POLITICAL

Former Yugoslav Republic of Macedonia

180°
150°W
120°W
90°W
60°W
30°W
0°
30°E
O C E A N
Kalaallit Nunaat
(Greenland)
(Denmark)
Arctic Circle
ICELAND
Reykjavik
Alaska
(USA)
60°N
CANADA
Ottawa
St Pierre and Miquelon
(France)
ATLANTIC
Azores
(Portugal)
Washington DC
UNITED STATES OF AMERICA
Bermuda (UK)
OCEAN
30°N
P A C I F I C
BAHAMAS
Nassau
Tropic of Cancer
Havana
CUBA
Hawaii
(USA)
Socorro Island
(Mexico)
MEXICO
Mexico City
HAITI
DOMINICAN REPUBLIC
Port-au-Prince
Santo Domingo
CAPE
VERDE
Clarion Island
(Mexico)
GUATEMALA
Guatemala City
42
43
44
45
46
47
48
49
50
HONDURAS
Tegucigalpa
San Salvador
EL SALVADOR
NICARAGUA
Managua
Praia
MARSHALL
ISLANDS
Majuro
O C E A N
Clipperton
(France)
San Jose
COSTA RICA
Caracas
TRINIDAD AND TOBAGO
Port of Spain
Panama City
PANAMA
VENEZUELA
GUYANA
Georgetown
Paramaribo
French Guiana (France)
Bogota
COLOMBIA
SURINAME
NAURU
Yaren
South Tarawa
Equator
0°
Quito
Galapagos Islands
(Ecuador)
ECUADOR
KIRIBATI
SOLOMON
ISLANDS
Honiara
Funafuti
TUVALU
PERU
Lima
BRAZIL
SAMOA
Apia
American Samoa
(USA)
French
Polynesia
(France)
VANUATU
Port Vila
FIJI
Suva
NIUE
Alofi
COOK
ISLANDS
Avarua
TONGA
Nukualofa
New Caledonia
(France)
La Paz
BOLIVIA
Sucre
Brasilia
PARAGUAY
Tropic of Capricorn
Pitcairn Island
(UK)
Asuncion
Norfolk Island
(Australia)
Rapa Nui
(Easter Island)
(Chile)
San Felix
(Chile)
CHILE
30°S
International Date Line
Juan Fernandez Islands
(Chile)
Santiago
URUGUAY
Buenos Aires
Montevideo
ARGENTINA
Wellington
NEW ZEALAND
Chatham Islands
(New Zealand)
LEGEND
Country border
Disputed country border
Country capital city
Azores
(Portugal)
Dependency
Auckland Islands
(New Zealand)
Falkland Islands (UK)
South Georgia (UK)
N
0
1000
2000
3000 km
SCALE 1:77 000 000 at 40°N and S
1 centimetre on the map measures
770 kilometres on the ground.
Modified Times Projection
60°S
O C E A N
Antarctic Circle
ANTARCTICA
180°
150°W
120°W
90°W
60°W
30°W
0°

Coastal landscapes are home to a diverse range of plants and animals, and they are important to the economy in providing resources and jobs. They are also places where people go to swim, surf and relax. This photograph shows a peaceful beach scene, but coastal landscapes are constantly changing – due to both natural forces and the way that people use them. We need to look after our coastal landscapes so that they can continue to provide the things we need.

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