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## THE EXPEDITION TO JAPAN UNDER COMMODORE PERRY AND THE BEGINNING OF THE AMERICAN INTRUSION INTO TAIWAN IN THE FIRST HALF OF THE 1850s

*The USA's policy in reference to Taiwan in the 50s of the XIX century has been studied in the article. Assisted by the published sources, the author shows a process of investigation of the island by Commodore M. Perry's expedition to Japan in 1852 – 1854 and has come to the conclusion that the Americans aimed for the economic exploration and the political domination of Formosa.*

*The ending of the first Opium War (1839 – 1842) and signing of the treaty of Nanking between Qing Empire and Great Britain allowed Great Britain to make decisive steps on the way towards its expansion in the Far East. In the first instance for the British trade five Chinese cities were opened. Also, according to the treaty, the island of Hong Kong passed under Great Britain's authority which strengthened the position of the state in the Far East.*

*Comprehending all the preferences, which the competition was to get, the Establishment of the United States under President John Tyler (1841 – 1845) endeavoured to obtain the identical conditions for commercial facilities in China. With this end in view, the USA's diplomatic mission was headed by Caleb Cushing (1800 – 1879) to Beijing in 1844. The treaty was signed in Vence on July, 3<sup>rd</sup>, 1844, after which the United States won the benefits from China which were similar to those of the British.*

*In the 50s of the XIX century Washington stood for the fastest hold of the island in the Chinese seas. And Taiwan was one of the main objects of the USA foreign policy during this period. Commodore Matthew Calbraith Perry (1794 – 1858) was the first American politician who appeared consistent for joining of the island. «Opening» of Japan in 1854 wasn't a single purpose of Perry's mission. Not the least important a task set to the Commodore by the American government was the investigation and potential acquisition of the islands in the China Sea. That's why Perry carefully studied all information about the region before the expedition and included the islands of Taiwan, Ryukyu, Bonin and Okinawa in the way of his expedition. Having no capability to explore each island which met on his way, Commodore decided to send two ships – «Macedonian» and «Supply» – to the shores of Taiwan in the end of May 1854 under the command of his assistant J. Abbott. The purpose of that visit to the island was the investigating into the fate of the Americans trapped in Formosa or the Japanese islands. Besides, captain J. Abbot explored coal mines of Formosa and the ways of organizing of coal supply, coal production volume and the cost of manufacture and loading. After Perry's expedition in the 50s of the XIX century in the American Establishment a permanently fixed opinion about Taiwan's capture predominated. It should have strengthened the USA political and economic interests in the Pacific.*

*Accordingly, the issue of Formosa's joining the USA was a key one after the end of the Second «opium war» between China and Britain in 1856 – 1860. This aspect will be discussed in the oncoming research articles.*

**Key words:** M. Perry, the USA, Taiwan, China, Japan.

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## ЕКСПЕДИЦІЯ КОМОДОРА ПЕРРІ ДО ЯПОНІЇ ТА ПОЧАТОК АМЕРИКАНСЬКОГО ПРОНИКНЕННЯ ДО ТАЙВАНІЮ У ПЕРШІЙ ПОЛОВИНІ 50-х рр. XIX ст.

*У статті розглядається американська експедиція до острова Тайвань, здійснена у першій половині 50-х рр. XIX ст. у ході дипломатичної місії комодора М. Перрі до Японії (1852 – 1854). Спираючись на джерельні матеріали та роботи представників західної історіографії автор доводить, що у досліджуваній період Перрі мав наміри не тільки відкрити для іноземної комерції японські острови, а й захопити*

*під американський контроль кілька островів у Тихому океані, які мали стати основою колоніальної імперії США у цьому регіоні. Також комодора цікавили можливості використання тихоокеанських островів у якості стоянки для кораблів торговельного та військово-морського флотів та видобуток вугілля. Саме тому, на думку автора, у досліджуваний період острів Тайвань опинився у центрі уваги представників правлячої еліти США.*

**Ключові слова:** Тайвань, Китай, Японія, США, М. Перрі.

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## **ЭКСПЕДИЦИЯ КОММОДОРА ПЭРРИ В ЯПОНИЮ И НАЧАЛО АМЕРИКАНСКОГО ПРОНИКНОВЕНИЯ НА ТАЙВАНЬ В ПЕРВОЙ ПОЛОВИНЕ 50-х гг. XIX в.**

*В статье рассматривается американская экспедиция на остров Тайвань, осуществленная в первой половине 50-х гг. XIX в. в ходе дипломатической миссии коммодора М. Перри в Японию (1852 – 1854). Опираясь на источники материалы и работы представителей западной историографии автор доказывает, что в исследуемый период Перри намеревался не только открыть для иностранной коммерции японские острова, но и захватить под американский контроль несколько островов в Тихом океане, которые должны были стать основой колонияльной империи США в этом регионе. Также коммодора интересовали возможности использования тихоокеанских островов в качестве стоянки для кораблей торгового и военно-морского флотов и добыча угля. Именно поэтому, по мнению автора, в исследуемый период остров Тайвань оказался в центре внимания представителей правящей элиты США.*

**Ключевые слова:** Тайвань, Китай, Япония, США, М. Перри.

**Problem statement.** Modern foreign affairs are defined by an increase of the economic significance and global influence of countries of the Asia-Pacific Region (APR). Today a number of the region's countries are playing more important role not only by the Eastern Asia border but in the international field on the whole. All the foregoing shows again the need of a follow-up study of the History of International Relations of the APR, especially at the time, when the strategy of action was being formed by the major players, in particular, the United States.

**The analysis of recent researches.** Recently an increasing number of sources has been included into scientific circulation which were unavailable to national scientists earlier. There are memoirs, official documents, historical works of participants of the events. These allow us to fill up certain gaps in the study of History of International Relations of Eastern Asia.

**The article's purpose.** Consequently, the research work is devoted to the study of the first attempt of the United States to control the island of Taiwan in the 50s of the XIX century, which was provided by commodore Perry during his famous expedition to Japan, when this country was opened for the Western trade. It should be noted that this theme hasn't yet been considered in Ukrainian historiography.

**The statement of the basic material.** The end of the first Opium War (1839 – 1842) and signing of the treaty of Nanking between Qing Empire and Great Britain allowed Great Britain to have made decisive steps on the way towards its expansion in the Far East. In the first instance for the British trade five Chinese cities were opened. Also, according to the treaty, the island of Hong Kong passed under Great Britain's authority which strengthened that state's position in the Far East.

Comprehending all the preferences, which the competition would get, the Establishment of the United States under President John Tyler (1841 – 1845) endeavoured to obtain the identical conditions for commercial facilities in China. With this end in view, the USA's diplomatic mission was directed by Caleb Cushing (1800 – 1879) to Beijing in 1844. The treaty was signed in Vence on July, 3<sup>rd</sup>, 1844, after which the United States won the benefits from China which were similar to such of the British.

With that Cushing didn't get a chance to achieve the rights from Qing government to hold the island off the Chinese coast. According to American decision-makers' opinion, without it the USA couldn't implement their expansive plans in the Far East to the full extent.

That's why, in the 50s of the XIX century Washington stood for the fastest hold of the island in the Chinese seas. And Taiwan was one of the main objects of the USA foreign policy during this period.

C. Cushing said about capabilities of American colonization of Formosa. However, commodore *Matthew Calbraith Perry* (1794 – 1858) was the first American politician who appeared consistent for joining the island. He was appointed the commander of a squadron in 1852, which was to achieve the opening of Japan for foreign trade.

His squadron, which consisted of 10 ships («Mississippi», «Sasukuyehan», «Povhatan», «Macedonian», «Supply», «Saratoga», «Vandalia», «Lexington», «Southampton», «Plymouth»), left Norfolk on November, 24<sup>th</sup>, 1852 and went to the shores of Japan across the Atlantic and the Indian oceans. It is important to note, that it was the fourth attempt of Washington to get from Japan's government the opening of their country. Once again the Americans couldn't have established diplomatic relations after numerous and fruitless attempts with «the land of the rising sun». That is why Washington decided to act by force. As a result, in March 1854, in Kanagawa (Yokohama) Perry signed the Japan-US treaty of «peace and friendship». According to this treaty, Japanese were forced to open the ports of Shimoda and Hakodate. And the Americans qualified to enter into other ports if necessary and also got a trade permit in Japan.

But the «opening» of Japan wasn't the only purpose of Perry's mission. Not the least important a task, which the American government set to the Commodore was the investigation and potential acquisition of the islands in the China Sea. That's why Perry carefully studied all the information about the region before the expedition and included the islands of Taiwan, Ryukyu, Bonin and Okinawa into the route of the expedition.

It should be noted, that he was a consistent supporter of the conquest of one of the Pacific islands. In his letter to minister of the Navy of December, 14<sup>th</sup>, 1852 he wrote this: «It should be noted, that Great Britain is already in important areas in East India and China seas. First of all, there are Singapore and Hong Kong ... It is fortunate, that many Pacific islands remain free and, therefore, very important for the United States, without wasting time, is to take active measures to ensure a sufficient number of ports ... for the continued success of our trade in the region» (Narrative, 1856, V. 2: 119).

Having no capability to explore each island which he came across on his way, in the end of May of 1854 the Commodore decided to send two ships – «Macedonian» and «Supply» – to the shores of Taiwan under the command of his assistant J. Abbott.

He wrote a letter to the Minister of the Navy James Dabbin (1853 – 1857) on May, 30<sup>th</sup>, 1854, wherein he noted: «According to the guidelines of October, 26<sup>th</sup>, 1852, May, 16<sup>th</sup>, and June, 11<sup>th</sup>, 1853 concerning the fate of our compatriots who have been lost in the seas, or held in captivity in Formosa or the Japanese islands... I send «Macedonian», accompanied by «Saunhempton», to Formosa for investigation and exploration of coal regions in the island» (Message, 1855: 152).

A preparation of this expedition began in early June, 1854. Perry made a detailed instruction for Abbott on June, 18<sup>th</sup>, which defined the main objectives and tasks of the journey of his deputy. In it he pointed out: «Sir, when the weather conditions allow, you, along with the ship «Supply» under the command of the Lieutenant K. Sinclair, should go to the port of Keelung (Jilong – O. N.) in the island of Formosa. The purpose of your visit to the island is the fulfillment of the instructions of the Ministry of Sea, which involves investigating in the fate of the Americans trapped in Formosa or the Japanese islands» (Narrative, 1856, V. 2: 137).

Additionally, Abbott got an order from Perry to explore opportunities of purchasing of Taiwanese coal and its industrial mining in the future. He specified: «Together with the matter of investigating in the fate of our compatriots, you should explore the coal mines of Formosa and the ways of organizing coal supply, volume of coal production and the cost of manufacture and loading» (Narrative, 1856, V. 2: 138).

Also, the instructions were given to purchase a party of Taiwanese coal. If the price is from 15 to 20 dollars per ton, it will be necessary to buy 50 – 100 tons. If the price is lower, then Perry ordered to buy 300 tons which must be loaded into the hold of the «Supply» (Narrative, 1856, V. 2: 138).

Chaplain H. Jones was included into the crew for the research.

Perry also noted, that «this direction does not limit your actions only to the port of Keelung in Formosa. If you think it necessary and safe, you can explore other ports of the island. Any information is desirable» (Narrative, 1856, V. 2: 138).

Abbott went to the north-eastern coast of Taiwan on June, 26, in the morning. On July, 11 the «Macedonian» arrived in Keelung. During the voyage the «Supply» was in arrears with the flagman and arrived 10 days later.

One can find the material on the expedition to Taiwan and its main results in the reports to Perry, written by Abbott and chaplain Jones, who, as noted, researched Taiwan coal mining.

According to a report of the American captain, it was devoted to the revelation of the issue of investigating the fate of the Americans, as Jones focused, who were related to the research of the coal branch in Taiwan.

In Abbott's dispatch of August, 26, 1854 to Perry, he reported the Commodore that his mission was aborted because the local authorities did not cooperate with the Americans.

Abbott wrote in his report: «I couldn't manage to conduct the surveillance which would allow to know the fate of those who were shipwrecked off the coast of Formosa. I also tried to learn about shipwrecks of American, British and European ships in different parts of the island from the local mandarins. But they said that they didn't hear of the ships which wrecked near the island. I was about to leave Keelung, when one of the mandarins said that 6 or 7 years ago, 40–50 miles from the city in the western part of the island, a ship with black people on board got wrecked. He also told me that the white members of the team were saved by reaching the neighboring island in a boat, but the black people were killed» (Narrative, 1856, V. 2: 143). However, in the opinion of the captain, this story was fabricated by the Chinese authorities in order to lure the Americans on the west coast of Taiwan, where they were forced to provide assistance to the Chinese massacre «rebels». Probably, there was a negotiation about Taiping, which began a rebellion in China (1850 – 1864).

Despite the failure of the humanitarian mission, which, maybe, didn't play a decisive role, Abbott evaluated the results of the expedition as high. First of all, the Americans managed to research the coal industry in detail. On July, 22 he wrote in his dispatch to Perry: «Our mission was quite successful here without regard to the failure of the information on the fate of our compatriots. The incessant search of coal by Reverend Jones allowed us to find 8 or 10 mines ...» (Narrative, 1856, V. 2: 142).

Later Abbott noted in his report: «There are serious reasons to believe that a lot of coal is in the other parts of the island where one can extract a lot more than near Keelung. The mines which we saw would be very valuable if to transfer them to American mining companies. They are arranged so that coal would be easy to deliver by building a short railway. That isn't expensive. A small harbor is approximately three miles from Keelung near the mines, which is protected from the north-east winds. The railway might pass from this harbor to the mines» (Narrative, 1856, V. 2: 142).

Whereas Jones, who provided the search and the purchase of Taiwan coal, left a comprehensive data about the American expedition.

This was reported by the chaplain: «Macedonian» went to the north-eastern coast of Taiwan on Monday, July, 10<sup>th</sup>. The next day, by use of services of the Chinese pilot, the ship entered the harbor of Keelung. After landing, Jones started the search for coal and mines. On the same day, he met with local traders who were set for to sell several tons of minerals. Also he found a mine in two miles in the east of the city. The participants were satisfied of the success and returned to the ship.

But the next day, on the 12 of July, the members of the expedition had difficulties. Chinese merchants refused to sell coal to the Americans. According to Jones, it was due to the local authorities who banned the business with strangers.

After the visit of Abbott and Jones to the local mandarin Le Chung-oh, the problem was resolved, but the local authorities continued to create barriers for the Americans.

On the 13 of July Jones with four sailors began to research the mines which had been found earlier. With a hammer and a chisel he was able to gain as much coal as his team could bring. In Jones's opinion, the clay (and hence rather soft) roof of the mine was only one barrier to prevent mining. However, this problem he planned to eliminate by using wooden props. The coal which was found was delivered in Keelung by the indigenous boat (Narrative, 1856, V. 2: 156).

At this time, the difficult negotiations about the purchase of coal continued with the local authorities. Allegedly, the Americans managed to find the seller, but the Chinese prefect didn't allow Abbott to realize their plans again. Without prejudice to the words of cooperation, the Chinese sabotaged every attempt to procure a necessary amount of minerals. Thus they provoked an irritation among the commanders of the expedition. In Jones's report of the 22 of July 1854: «The local manderines are quite friendly and sympathetic in attitude to us. But their panic before the authorities prevented to obtain the necessary information. Additionally, a constant desire of a chief clerk to deceive can not be found in other parts of China. All our reseaches were complicated due to the constant efforts of the local residents to deceive us or hide the necessary facts». (Narrative, 1856, V. 2: 146).

On the 15 of July Abbott and Jones visited the residence of the prefect again. The goal of the visit was the presentation of gifts. Meanwhile, the Americans tried to obtain from the official an approval for the exploration of coal resources in the east coast of Taiwan 100 miles from Keelung. But Le Chung-oh didn't allow them to start the expedition, arguing that the area which interested the Americans was «wild» and was inhabited by cannibals..

Having gotten no change from the Chinese authorities, Abbott decided to act independently. The next day he met with the two locals who agreed to show the Americans – for a good pay – the secret coal deposits on the eastern coast.

In the morning of the 17 of July Jones's small expedition went to the restricted area. After three miles they saw new coal deposits to a great joy of the chaplain. It turned out that in this matter manderines deceived him by saying that the next mineral reserves are within 100 miles. A conducted exploration showed that the coal here was of «excellent quality» (Narrative, 1856, V. 2: 158).

The following day (Tuesday, the 18 of July) was devoted to attempts to procure coal in Kilunzi. However the traders again refused to deal with the Americans, citing the fact that for the sale of the goods they need a written consent from the officials. When Jones asked one of them, he replied that he couldn't publish it because it was his colleague who has the seal and who was not in the city. Then the Americans tried to persuade him to give a verbal consent, but the mandarin disagreed because he would be in for it.

Only on Friday, July, 21<sup>st</sup>, the Americans persuaded Le Chung-oh. He arrived at a price of 20 dollars per ton, but Jones managed to knock it to 16 dollars. The purchased coal was loaded on the the «Supply», which finally arrived in Keelung the same day.

Two days later, «Macedonian» left Taiwan and went to the Philippines (Narrative, 1856, V. 2: 180). Despite all the difficulties the expedition was ended successfully.

The both Abbott and Jones's reports were lay on Perry's table. No doubt, the reports played a role in the definition of the Commodore's views regarding the necessity of the seizure of Taiwan and the creation of an American naval and commercial base here. Some western historians believed that he hadn't aggressive intentions to Formosa and the main reason for sending Abbott's expeditions to the island was a shortage of coal for a return journey. The American scientist J. Schroeder believed that Perry was dissatisfied with the price of \$ 30 per ton in the Japanese port the Shimoda and that was why he gave his order to Abbott hoping to buy for \$ 15 in Formosa (Schroeder, 1943: 243). At that the Commodore hadn't any forward-looking plans in Taiwan.

But the analysis of his personal papers and road notes does not allow us to agree with this view. In 1855 Perry published the book «The Chronicle of the Expedition of the American Squadron in the China Sea and Japan in 1852, 1853 and 1854 under command of M. Perry». This book was edited by historian F. Hawkes, it consisted of the Commodore's and his officers' testimonies and a long time remained the only source on the history of the American policy in the Pacific.

In this fundamental work Perry outlined his views regarding Taiwan's future. He wrote, that «the establishment of the USA domination in Formosa will gradually increase the social and political power of the USA in this part of the world and, therefore, its wealth. Nobody of the European governments will oppose. On the contrary, their policy should promote the USA domination since it would be of benefit to their trade» (Narrative, 1856, V. 2: 119).

Perry also outlined the main benefits of Taiwan's mastering. In his opinion, «the geographical position of Formosa makes it an ideal trans-shipment base and a structure for the USA trade because the

island has communication with China, Japan, the islands Lyutsyu, Koksinsinhoyu, Cambodia, Siam, the Philippines and all the islands in those seas» (Narrative, 1856, V. 2: 180).

Commodore also noted the importance of coal to the Taiwanese American fleet in the Pacific. It should be noted that after returning to the USA he sent engineers J. Gai and William Everett to examine the samples of minerals. They also noted the high quality of the Taiwanese coal which were similar models from Japan and England (Please see above, p. 491). That's why Perry noted in his paper that «important role from the point of increasing of steam in the eastern trade has Taiwan coal. Today majority of the coal which is consumed by numerous military and trade ships, arrives from England, providing the huge cost of freight» (Narrative, 1856, V. 2: 180).

**The conclusions.** Consequently, after Perry's expedition in the 50s of the XIX century, in the American Establishment an opinion about Taiwan's capture was permanently fixed. It should have strengthened the USA's political and economic interests in the Pacific. Accordingly, the issue about Formosa's joining the USA was a key one after the end of the Second «opium war» between China and Britain in 1856 – 1860. This aspect will be discussed in the oncoming scientific articles.

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