

*THE SHADOW OF EMPIRE:  
CHRISTIAN MISSIONS, COLONIAL POLICY, AND DEMOCRACY  
IN POSTCOLONIAL SOCIETIES*

by  
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A dissertation submitted to the faculty of the University of North Carolina at Chapel Hill in partial fulfillment of the requirements for the degree of doctor of philosophy in the Department of Sociology.

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## ABSTRACT

ROBERT D. WOODBERRY: *The Shadow of Empire: Christian Missions, Colonial Policy, and Democracy in Postcolonial Societies.*  
(under the direction of Kenneth A. Bollen and Christian S. Smith)

Cross-national empirical research consistently suggests that, on average, former British colonies are both more democratic and have more stable democratic transitions. I argue that former British colonies are distinct not because Great Britain was a democracy – so were France and Belgium during the late 19<sup>th</sup> and early 20<sup>th</sup> century. Nor were the British more altruistic. However, British colonial elites were more divided and thus more constrained. In particular, religious groups were more independent from state control in British colonies than in historically-Catholic colonies (i.e., colonies of France, Belgium, Spain, Portugal, and Italy). Initially the British restricted missions in their colonies, but Evangelical Protestants forced the British to allow religious liberty in 1813. Protestants were not able to win religious liberty in most other European colonizers during the entire period of colonization.

Protestant missionaries were central to expanding formal education in the colonies because they wanted people to read the Bible in their own language. Governments wanted a small educated elite that they could control. Other religious groups invested in mass vernacular education primarily when competing with Protestants.

Missionaries also constrained colonial abuses when they were independent from state control (i.e., chose their own leaders and raised their own funds). If colonial exploitation was

extreme, it angered indigenous people against the West and made mission work difficult. Thus missionaries had incentive to fight abuses. Other colonial elites had no incentive to expose their abuses, and indigenous people had little power in the colonizing state. This left missionaries in a unique bridging position. Non-state missionaries also fostered institutions outside state control, institutions that nationalist leaders later used to challenge British colonization and birth political parties.

Statistical analysis confirms the centrality of missions in expanding education and fostering democracy. Controlling for Protestant missions removes the association between democracy and British colonization, other “Protestant” colonization, percent European, percent Muslim, being an island nation, and being a landlocked nation. Other controls (such as current GDP, and current education enrollments) do not remove the strong positive association between Protestant missions and democracy.

To my parents Dudley and Roberta Woodberry. Thanks for your love and support through all these years.

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## CHAPTER 1:

### INTRODUCTION

Almost twenty years ago, cross-national empirical research by Bollen and Jackman (1985a; 1985b) suggested that former British colonies tend to be more democratic. Since then, most other statistical analyses of political democracy have found similar results. These findings are consistent over time, between regions, with multiple statistical controls, and with multiple measures of political democratization (Woodberry 1999; 2000c; Gasiorowski and Power 1998; Midlarsky 1998; Lipset 1994; 1959; Hadenius 1992; Weiner 1987: 19; Diamond, Lipset and Linz 1987).<sup>1</sup> Former British colonies also have more stable democratic transitions (Clague, Gleason and Knack 2001; Treisman 2000; Weiner 1987). As political scientist Myron Weiner (1987) points out, “every country with a population of at least one million (and almost all the smaller ones as well) that has emerged from colonial rule and has had a continuous democratic experience is a former British colony” (p. 20).

The analyses listed above do not imply that *all* British colonies are democratic or *all* non-British colonies are not. They are probabilistic statistical arguments, not universalistic

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<sup>1</sup> A couple recent studies have found a weak or statistically insignificant impact of British colonialism on democracy in the late 20<sup>th</sup> century (e.g., Barro 1999; Kurzman and Leahey 2001). However, these papers control for previous experience of democracy and the impact of British colonialism is fixed: it does not increase between independence and the 1990s net of its impact on educational and economic trajectories – which are statistically controlled in these analyses. We would not expect the direct impact of British colonialism to be over and above its impact on a society’s previous experience of democracy. Still, my own analyses suggest that as democracy has spread, the distinction between British colonies and other colonies is diminishing. By the 1990s British colonialism no longer increases the likelihood of being democratic. However, my analysis deletes British European-settler-colonies – which are highly democratic. Moreover, British colonialism does remain a factor in the order of which societies democratized.



ones. Thus, the argument is not disproved by specific examples of French colonies that are unusually democratic or British colonies that are unusually authoritarian. In most years, being a former British colony increases the probability of being more democratic, holding all else equal.

However, British colonialism is not the only factor that influences democracy. In fact, many British colonies are not particularly democratic, including many former colonies in the Middle East and Africa. British colonies that have been most democratic (relative to other former colonies) are India, Mauritius, and islands in the Pacific and Caribbean. These are generally locations where British colonial influence was longer and more pervasive than in Africa, Burma, and the Middle East. In fact, democracy seems strongest in areas where the impact of British colonialism was most significant. Clague, Gleason, and Knack (2001) test this assertion by analyzing two different indicators of British colonial influence: length of colonization and breadth of fluency in the English language. They found that, on average, the longer a society was colonized by the British and the deeper the penetration of the English language, the more democratic it is – even with education, percent of the population that is European, and other factors controlled (also see Diamond, Lipset and Linz 1987).

British colonies are distinct in other ways as well. The British ended slavery and forced labor earlier than other colonizers, and more gradually devolved power to indigenous institutions. British colonies also ended up with more education and infrastructure than other colonies (Brown 2000; Tony Smith 1978; Greenlee and Johnston 1999; Grier 1999; Hanson 1989). Moreover, the longer societies were colonized by the British, the more education they have (Hanson 1989) and the greater their post-colonial economic growth – even controlling for GDP per capita at independence and other relevant factors (Grier 1999). Former British

colonies also have lower levels of post-colonial political corruption – even when the current level and past experience of democracy are controlled, along with other relevant factors (Treisman 2000).

Why British colonies ended up so distinct has important implications for our understanding of the democratization process and the interaction of powerful groups with less powerful groups. It certainly does not seem to fit what we would expect from a standard exploitation or world systems account of colonialism. The British were the most powerful colonizer in the 19<sup>th</sup> and early 20<sup>th</sup> centuries, and thus, were presumably most able to impose their will and extract resources from colonial subjects. Yet their colonies ended up better off in a number of different ways. In the rest of this dissertation, we will discuss why this strange turn of events developed.

*Traditional Explanations for the British Colonial Effect:*

*British Democracy:* One reason why former British colonies might end up being more democratic is that Great Britain was substantially a democracy during the 19<sup>th</sup> and 20<sup>th</sup> centuries and thus was more likely to act democratically and set up democratic institutions in the colonies. However, France and Belgium were also democracies during much of this period.<sup>2</sup> Yet British colonies are significantly more democratic than French or Belgian colonies. Statistically, neither colonization by a democracy, nor the log years of colonization by a democracy increases the probability that a former colony will be democratic; only being colonized by Great Britain, the U.S., New Zealand, or Australia does (Clague, Gleason and

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<sup>2</sup> The British did have a different style of democratic institutions than the French and Belgians. Elsewhere I argue for the religious roots of these differences and the importance of Nonconformist Protestants in forcing the British government to tolerate organizations outside their control (Woodberry 1996a; 2000c).

Knack 2001). Thus, the democratic status of Great Britain is not sufficient to explain its impact.

Moreover, democracies do not necessarily act democratically towards people that cannot influence elections. The United States, while a democracy, practiced chattel slavery and prevented many free blacks from voting. The US government confiscated Native American land in direct violation of treaties it had made with tribal leaders, blocked Native Americans from bringing cases in US courts, and even ignored Supreme Court rulings in favor of indigenous peoples (e.g., McLoughlin 1984; 1990). The British government, while a democracy, slaughtered indigenous peoples, practiced slavery, forced China to import opium, killed dark-skinned subjects without benefit of trial, and so on (e.g., Heumann 1994; van der Veer 2001: 59, 87; Breward 2001). The French, while a democracy, slaughtered thousands to civilians to prevent decolonization. For example, in March through April of 1947, the French military responded to nationalist raids on an army base in Madagascar with a repression that killed at least 86,000 people – even by official estimates (Tony Smith 1978: 84). The French, while a democracy, rigged elections in their colonies (Tony Smith 1978: 87, 93) and even limited the travel of colonial subjects to France to prevent them from picking up democratic ideology (Kelly 2000b; 2000d).

Thus, it seems democracies often ignore the interests of non-citizens as long as no citizens mobilize political pressure on their behalf. While democracy may allow citizens to mobilize on behalf of non-citizens and may provide democratic institutional models other groups can imitate, democracy did not insure that colonial governments would follow the rule of law or allow democratic initiatives by colonial subjects. European settlers often exacerbated the problem by pressuring democratic Western governments to suppress

indigenous people's interests and violently suppress indigenous protest movements (e.g., Tony Smith 1978; Heuman 1994; Russell 1993). In fact, executive decisions by appointed British officials were often more beneficial to indigenous interests than decisions by local settler-dominated "democratic" institutions (e.g., Stanley 1990; Ferguson 2002; Russell 1993; Heuman 1994; A. Ross 1986).

*Indirect Rule:* Another possible explanation is British indirect rule fostered later democracy than the direct rule of many other colonizers (Tony Smith 1978; Bollen and Jackman 1985a; Lipset 1994). Indirect rule can be viewed in two different ways: 1) leaving indigenous institutions in place and 2) gradually devolving power to indigenous legislatures and courts. Leaving indigenous institutions in place does not seem to have fostered democracy; devolving power to indigenous legislatures and courts may have. In this section I will critique the first argument. I will discuss the second argument later in this dissertation. I argue that the need for the British to gradually devolve power was related to missionary agitation and religious liberty.

Leaving indigenous institutions in place does not seem to have fostered political democracy – at least it does not explain the variation in democracy between different British colonies. We can see this in several ways. First, research by Matt Lange (2004; forthcoming) suggests that the more the British used indirect rule in particular colonies, the less democratic these colonies generally were after independence. He measured "indirect rule" as the proportion of legal cases decided in traditional courts versus British colonial courts. He found that those colonies where traditional courts decided a higher proportion of legal cases were generally less democratic.

Second, we can compare crown colonies with protectorates. In crown colonies, like India, Jamaica, and the Bahamas, the British had long-term, pervasive influence. A number of these crown colonies are relatively democratic. Alternatively, in protectorates, the British generally left indigenous institutions alone. Many of these, such as Nepal, Bhutan, Yemen, Oman, Qatar, Bahrain, the United Arab Emirates, and Lesotho have had little political democracy since decolonization.

Third, if we view the penetration of the English language by 1960 as a proxy for direct colonial intervention, former British colonies that had more English penetration are, on average, more democratic (Clague, Gleason and Knack 2001). Thus, if indirect rule explains the association between former British colonies and democracy, it seems strange that the British colonies that had the largest “dose” of indirect rule are generally the least democratic.

In fact, some scholars argue that British colonizers used indirect rule, communalism and customary law – rather than direct administration and British law – because it made it easier to dispossess indigenous people of their land, extract labor, and legitimize their subordination. “In short, the embrace of communalism and custom, and the concomitant erasure of rights, was ‘hugely convenient’ for the colonial state” (Comaroff and Comaroff 1997: 366-67).

*Common Law Legal Tradition:* Alternatively, British colonies may be more democratic because the British used common law rather than civil law (e.g., Weiner 1987: 19).

Theoretically, common law courts are more independent from executive control, and thus should be less open to corruption and more willing to limit government abuses. However, statistical evidence suggests that the *type* of legal system may not be the crucial factor. We

can test this because some former British colonies use French style civil law and some countries never colonized by the British have adapted British style common law. On average, societies with a common law system are significantly less corrupt than societies with a civil law system (La Porta *et al.* 1999), but only if we do not control for British colonialism. Once we control for being a British colony – the relationship reverses; now former British colonies are less corrupt, common law societies are more corrupt (Treisman 2000).

Similarly, historically-Protestant societies that never were colonized by the British, but have adopted civil law legal systems are also significantly less corrupt. Thus, the legal culture of court independence and a civil society that fights against corruption may be more important factors than the type of legal institutions (Treisman 2000).

*Factor Endowments:* British colonies may be more democratic because the British got the “best land.” Some scholars argue that economic development is primarily related to climate and resource endowment (e.g., Diamond 1997) and research consistently suggests that economic development is related to democracy. However, if there is a link, it would only be historic, since British colonies are more democratic even after researchers control for economic development and geography (Gasiorowski and Power 1998; Midlarsky 1998; Hadenius 1992; Bollen and Jackman 1985a; 1985b; Bollen 1979; Clague, Gleason and Knack 2001; Treisman 2000).

However, historical evidence suggests that the British often did not get what Europeans considered the best land at the time. Especially outside Africa, the British generally had to pick places that the Spanish, Portuguese and Dutch either never colonized or left sparsely

occupied. For example in the Americas, most early European commentators considered Latin America preferable to North America both in climate and resource endowment (Engerman 2002; Sokoloff and Engerman 2000; Coatsworth 1993; 1999). Native American societies were wealthier and more complex in Peru and Mexico than north of the Rio Grande or in the Lesser Antilles. Into the 18<sup>th</sup> century, even British, French, and Dutch settlers disproportionately migrated to the Caribbean, not North America (*ibid.*).

Initially French, Spanish, and Portuguese colonies in Latin America were more economically developed than British colonies. Until 1800, French colonies like Haiti and Spanish colonies like Argentina and Cuba had higher GDPs per capita than British/Protestant settler colonies like the US and Canada (Engerman and Sokoloff 1997; Engerman and Sokoloff 2000; Coatsworth 1999). However, these historically Catholic colonies rapidly lost ground economically in the 18<sup>th</sup> and 19<sup>th</sup> centuries (*ibid.*). Thus, initial resource endowments probably do not explain the current divergence in the incomes of societies in the Americas. Engerman, Sokoloff, and Coatsworth all suggest that broader education rates and more efficient institutions in British colonies – particularly in British settler colonies – explain the 19<sup>th</sup> century divergence in incomes.

Research on differential growth rates in Africa and other areas of the world also suggests that education and institutions are crucial to later growth and that British colonies tend to have more education and better institutions (Hanson 1989; Keefer and Knack 1997; Easterly and Levine 1997). For example, in a study of former colonies economist Robin Grier (1999) demonstrates that per capita GDP at time of independence did not influence later economic growth. However, both being a British colony and years of colonization did. This result held both worldwide and in Africa. Thus, again initial resource endowment does not seem to be

the crucial factor. Grier's analysis suggests that education levels at the time of independence explain the differences in post-colonial growth rates. As we will see later in this dissertation, education levels at independence are directly related to missionary activity. Protestantism also seems to foster later growth rates in former colonies (Grier 1997). Thus, the evidence consistently suggests that any advantages British colonies may have had are not because they had superior resource bases.

*“British Culture”*: Finally, some scholars leave the association of British colonization and democracy unexplained. But positing an unspecified “British colonialism effect” leaves the impression that British colonizers were “altruistic,” or at least more “altruistic” than other colonizers. I do not believe they were.

The British did not colonize to be altruistic. They colonized to protect their interests and get money, power, and prestige (Ferguson 2002). They did not fight the Opium Wars and force China to import opium to be altruistic, they did not participate in the slave trade to be altruistic, and they did not slaughter indigenous peoples to be altruistic. However, they worked in a different political environment than other European colonizers – an environment where they had more difficulty controlling religious groups. These religious groups were crucial in transforming the process of colonization.

In the 1790s Nonconformist<sup>3</sup> Protestants in Great Britain began mobilizing a massive movement for foreign missions. Initially the British blocked them from entering British colonial territories such as India. However, missionary supporters mobilized a national

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<sup>3</sup> Nonconformists are Protestants who are *not* members of the state church. In Great Britain these are Baptists, Methodists, Quakers, and any other “Protestant” group that is not Anglican. They are also often called Dissenters. Evangelical Anglicans also participated in the missions movement, but I use the term “Nonconformist missionary movement” to distinguish this large movement from earlier piecemeal efforts by Anglicans.



pressure campaign that in 1813 forced the British to accept religious liberty in their colonies. Protestants were not able to win religious liberty in most other European colonies during the entire period of colonization. Once securely ensconced in British colonies, missionaries pressured the government to expand formal education and restrict previously common abuses. For example, in the 1830s missionary reports spurred the movement for the immediate abolition of slavery. Missionary supporters used the same infrastructure and tactics they had used in 1813, but this time used them to force the abolition of slavery in 1834. Many current social movement scholars ignore the 1813 movement and consider the 1834 movement the first modern social movement. This pattern of missionary reports and Evangelical<sup>4</sup> social reform movements repeated regularly during the colonial period. I argue this is what made British colonialism distinct.

From 1813 onward, British colonists had to deal with a powerful interest group whose interests were hampered by the opium trade, slavery and many other colonial abuses; an interest group whose interests were enhanced by formal education and some other resource transfers; an interest group that had more independent power in British colonies than in other European colonies.

Colonized peoples could not vote against the leaders of the societies that dominated them and colonized peoples did not have powerful political lobbies in the colonizing state. Thus, colonized peoples were dependent on lobbying by others to moderate abuses and enhance resource transfers. Although indigenous initiatives are important within particular colonies, in this analysis I bracket them because I do not think indigenous peoples varied systematically between colonizers. Indigenous peoples varied in culture, tactics, and so on,

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<sup>4</sup> Evangelicals were Protestants that had a high view of Biblical authority, believed salvation was through Christ alone, and emphasized evangelism. In the 19<sup>th</sup> century, most Nonconformists were Evangelicals, but some Anglicans were as well.

but this is an additional layer of variation, not a systematic difference between British and other colonies. What varied systematically between colonizers was the political opportunity structures that facilitated different types of indigenous initiative. The independence of religious groups from state control and the concomitant spread of Protestant missions and religious competition helped create a different political opportunity structure.

Overview of My Argument: The Consequences of Religious Liberty.

In this sub-section I give a slightly more detailed overview of my historical argument and show how historic colonial events shaped post-colonial democracy. I argue that what was unique about British colonialism was the relationship of church and state in British colonies. In historically-Catholic colonizers (i.e., France, Spain, Portugal, Italy and Belgium), as well as post-colonial Latin American societies, the Catholic Church pressured for a religious monopoly. States gained the rights to appoint/approve bishops and paid the salaries of most Catholic clergy. Protestants were excluded or severely restricted (e.g., Tudesco 1980; Callahan 2000; Helmreich 1964).

In British colonies, Nonconformist Protestants pressured for religious liberty – and won it in 1813 (Hamburger 2002; Cox 1997; Walls 1996a; Missionary Register 1813). This liberty increased the flow of Protestant missionaries to British colonies (relative to other colonies); increased religious competition in British colonies; and increased the independence of missions and other religious organizations from state control. These factors influenced the amount of formal education, the pervasiveness of colonial abuses, and the expansion of civil society. These, in turn, influenced post-colonial democratization.

*Formal Education in the Colonies:* Past scholarship suggests that former British colonies ended up with more education than other colonies (Kamens 1988; Brown 2000; Clarke 1997: 121). I argue this was because of the greater prevalence of Protestant missionaries in British colonies. Protestants wanted people to read the Bible in their own language and thought formal education would undermine “superstition.” Thus, wherever they went they almost immediately created schools and mass literacy campaigns. Even much of the state sponsored education in British colonies was initiated through Protestant missionary pressure (e.g., Ingham 1956; Miller and Stanczak 2000: 13; Sundkler and Steed 2000: 636-45).

Prior to Vatican II (which ended in 1965), Catholics primarily invested in mass education when they were competing with Protestants or competing with an anti-clerical government that used education to attack the Catholic Church (Sundkler and Steed 2000: 286; Clarke 1997: 152; Gill 1998). For example, compare 19<sup>th</sup> century Catholic education in the U.S., Ireland, and France – where the Church experienced this competition; with Catholic education in Spain, Portugal, Argentina, and Brazil – where it did not.

The quantitative literature on democracy suggests that societies with more education are generally more democratic (e.g., Kamens 1988). Moreover, education fosters other factors which facilitate democracy. First, education increases human capital which facilitates economic growth (e.g., Barro 1991). Societies with higher GNPs are generally more democratic and have more stable democratic transitions (e.g., Bollen and Jackman 1985; Gasiorowski and Power 1998). Second, mass education helps expand the size of the elite and the middle class, which makes oligarchy more difficult to sustain and fosters democratization (Easterly 2001; Lipset 1994; Schumpeter 1950). Third, mass education may increase the

transfer of democratic ideology – especially education both outside the control of the colonial state and conducted by citizens of democracies. This transfer of democratic ideology may have influenced the type of governments elites tried to form after independence. Fourth, the large supply of educated indigenous people motivated the colonial government to hire more of them into the colonial government. Thus, more indigenous people gained skills running Western-style bureaucratic organizations and could run them more successfully after the colonial government left. This increased postcolonial stability and state capacity (Tony Smith 1978; Lipset 1994 – see Dahl 1971 for a theoretical discussion of this). Together these factors fostered post-colonial democratization.

*Limiting Colonial Abuses:* During the colonial period, non-state supported missionaries were in a unique bridging position. Indigenous peoples suffered most from colonial abuses, but had little political influence in the colonizing state. Colonial officials, businesspeople and settlers had influence in the colonial state, but often benefited from colonial abuses. Missionaries both had political influence in the colonizing state and did not benefit from many colonial abuses. In fact, many abuses angered indigenous people against Christianity – which many associated with the colonizing power – and made the work of missionaries harder. Hence, missionaries had incentive to selectively fight colonial abuses (e.g., Miller and Stanczak 2000).

In British colonies, greater religious liberty allowed missionaries to spread more diversely. This increased their exposure to colonial abuses of indigenous people. Moreover, because the state did not appoint missionary leaders in British colonies and did not pay their salaries, missionaries were more independent to critique the state when it went against their

interests (e.g., Greenlee and Johnston 1999: 34-38). In Great Britain, a large portion of the population also supported Protestant missions. Missionaries often mobilized these supporters to pressure government officials. Therefore, missionaries were more able to restrict colonial abuses and expand the rule of law in British colonies (e.g., Greenlee and Johnston 1999; Miller and Stanczak 2000; Oddie 1978; 1996b; Stocking 1987: 240-54, 272). This may have moderated corruption, fostered the independence of the judiciary, and fostered post-colonial rule of law.

*Expanding Civil Society:* Missionaries brought new forms of social organization to the nonwestern world. Protestant missions were closely connected to the social reform movements of the Second Great Awakening (e.g., abolitionism, temperance, prison reform, and so on) and missionaries brought the organization and tactics of non-violent social movements with them to the missions field. Not only did missionaries set up religious organizations and attempt to convert people, they also often tried to reform what they viewed as abuses in other societies (e.g., foot binding, female genital cutting, widow burning, consummation of marriage under age 12, and so on). Both their conversionary and social reform activities often spurred major reactions from indigenous peoples. Other religious groups developed organizations to fight conversions and either fight for or against mission-initiated social reforms. However, these organizations copied the organizational forms and tactics of missionary-initiated organizations.

Because of the disassociation between missions and state in British, colonial officials did not *automatically* perceive groups that organized to counter missions as a threat, as long as they were non-violent. Colonial officials and business people often viewed missionaries

as a nuisance. Consequently, the British allowed anti-missionary organizations to develop under their policy of religious liberty. However, over time both Christian and non-Christian organizations helped local people develop cross-national networks, pools of resources, broad readerships, leadership experience, and public recognized leaders. Nationalists later used these resources to resist the colonial state and force the British to gradually devolve power to indigenous institutions. These groups often helped create the foundation for the formation of political parties (e.g., Deol 2000; Zavos 2000; Das 1999; Prasad 1999). Organizational civil society was more anemic in colonies without religious liberty.

Caveats:

Before further elaborating my arguments, I should make five caveats. First, I am *not* arguing that British colonialism was particularly beneficial or that colonized people would not have been better off if everyone had left them alone. Rather, I argue that British colonialism was less pernicious than other forms of European colonialism, at least as it relates to political democratization and education.

Second, I am not arguing the impact of missions was completely positive – it was not. Missionaries often had ethnocentric attitudes, fought practices that were important to other people’s cultures, and resisted indigenous control of institutions they founded. However, in this dissertation, I do not have space to discuss all the effects missions had on nonwestern societies, just those that influenced postcolonial democratization. Nor do I have space to discuss all the diversity in missionary attitudes and actions; I must focus on their overall

impact. This dissertation is not intended to be a comprehensive history of missions; it is an attempt to explain *some* of the variation in democracy in post-colonial societies.

However, I do argue that the cultural sensitivity of missionaries was greater than most academics assume and that their overall impact was more positive than most academics assume. The Harvard historian William Hutchison argues that “If deficient from a modern point of view in sensitivity to foreign cultures, [missionaries] were measurably superior in that regard to most contemporaries at home or abroad” (1987: 1, also see Levy and Peart 2002; Cox 1997; Sundkler and Steed 2000; Rooke 1978-79; Comaroff and Comaroff 1991; 1997; Stocking 1987; Stanley 1990; Walls 1996b; 1996c; 2002a; 2002b).<sup>5</sup>

One way to demonstrate the relative cultural sensitivity of missionaries is to compare them to 19<sup>th</sup> and early 20<sup>th</sup> century anthropologists – generally the harshest critics of missionaries both then and now – although for different reasons. Early anthropologists generally criticized missionaries for subscribing to the “unscientific” idea of the common origin and comparable intellectual capacity of all peoples. A substantial portion of early anthropologists argued that blacks were a distinct species closer to apes than to Europeans (Stocking 1987: 251-4; Stanley 1990: 162-72).

For example, James Hunt coined the word “anthropology” to differentiate his work from the missionary inspired “ethnography.” He also founded the first anthropological society, and edited the first two anthropological journals. In his influential monograph *The Negro's Place in Nature*, he wrote “... it appears that in the Negro the growth of the brain is sooner arrested than in the European ... With the Negro, as with some other races of man, it has been found that the children are precocious, but that no advance in education can be made after they

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<sup>5</sup> Hutchison (1987) claims that the negative attitudes most academics hold toward missionaries is attributable to lack of scholarship with primary mission sources and antipathy to the main goal of most missionaries – converting people (p. 2 – see Stanley 1990: 11-53 for a more thorough analysis).

arrive at the age of maturity” (1863: 8, 12). Hunt claimed that missionaries resisted these truths of anthropology because of their outmoded religious beliefs in the commonality of all humanity. Thus, to establish anthropology as a discipline, missionaries had to be fought. In an early volume of the *Anthropological Review* he wrote:

In this endeavor to commend Anthropology to more general acceptance, we must not hide from ourselves that two great schools are, on principle, decidedly opposed to our pretensions. These two influential parties, while differing widely from each other on many other points, at least cordially agree in discarding and even denouncing the truths of Anthropology. They do so because these truths are directly opposed to their cardinal principle of absolute and original equality among mankind. The parties to which we refer are the orthodox, and more especially the evangelical body, in religion, and the ultra-liberal and democratic party in politics. The former proceed on the traditions of Eden and the Flood. . . the later base their notions on certain metaphysical assumptions and abstract ideas of political right and social justice, as innocent of scientific data, that is, of the fact as it is in nature as the wildest of the theological figments which set Exeter Hall in periodic commotion, at the never failing anniversaries of missionary enterprise (1866: 114).<sup>6</sup>

The views of James Hunt and other scientific racists influenced many early British colonizers and explorers (Prasch 1989; Levy and Peart 2002; van der Veer 2001: 134-57; Stocking 1987).

After the rise of Darwinism, a growing number of anthropologists believed in a common origin for all humanoids, but that darker skinned races were less evolved (Stocking 1995; 1987: 234-5, 272-3, 326). However, both monogenist and polygenist anthropologists commonly argued dark skinned peoples were biologically incapable of abstract thought. Thus, they often argued that missionary attempts to educate them or convert them to a “true” understanding of Christianity were doomed to failure (Levy and Peart 2002; Cox 1997: 352, 368; Stocking 1987; Stanley 1990: 162-72; van der Veer 2001: 134-57; Stanley 1990: 162-63). Although 19<sup>th</sup> and early 20<sup>th</sup> century missionaries were influenced by the prevailing

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<sup>6</sup> Exeter Hall was the headquarters of various Nonconformist missionary organizations and social reform movements.



academic ideology of their day, they were generally toward the egalitarian fringe, and were criticized as such by their contemporaries.

Third, I do not think missions currently have the same effects that they did during the colonial period. Governments have taken over most mass education from religious groups – the Protestant idea that every member of society should be educated has become part of world culture (Ramirez and Boli 1987; Meyer, Ramirez, and Soysal 1992) and spread beyond areas where Protestants predominate and Protestant missionaries had major influence. As a result, Protestants and missionaries are no longer distinct in promoting mass education – in fact, since the Fundamentalist/Modernist split of the 1920s, some Protestant groups resist some forms for modern secular education.

Moreover, colonialism has ended in most societies, thus missions no longer have a unique bridging position. Indigenous peoples have more direct influence on their own governments than missionaries do. Hence, missionaries have less leverage over education, corruption, and government abuses, and have little power to pressure governments to remove “unethical” officials.

Additionally, many new international nongovernmental organizations developed during the 20<sup>th</sup> century (e.g., Amnesty International, Freedom House, and Human Rights Watch). Many of these groups specialize in monitoring human rights abuses, and have taken over some of the role mission organizations filled in earlier periods. While individual missionaries report abuses to these groups, they are less motivated to become activists and risk government restrictions on their religious activity.

International communication has also increased rapidly. Newspapers, reporters, cameras, video cameras, and tape recorders are spread widely through the world, making it easier to record abuses. Telephones, computers, and regular international travel make it easier for information to travel between countries and more news agencies have access to reporters around the world than they did in the 19<sup>th</sup> and early 20<sup>th</sup> centuries. As a result, people get less of their international news from missionary sources.

Finally, in the 20<sup>th</sup> century the training of diplomats has become more institutionalized through professional schools. This formalized training has become more valued than the informal life experience of missionary children. Thus, over time missionary children have become less prominent in diplomatic circles (e.g., Hutchison 1987; Kaplan 1995).

Fourth, in this chapter, I do not have space to nuance the variation within and between colonial governments. I often must generalize about French, Spanish, Portuguese, Italian, and Belgian colonialism, sometimes in one sentence. However, I am analyzing why former British colonies are, *on average*, more democratic than the former colonies of other European powers, and these other colonies share many general tendencies.

Fifth, to many audiences, my argument will sound Eurocentric. After all, I analyze the influences of Protestantism, British colonialism, and Western religious personnel in promoting democratization in the nonwestern world. Indigenous actors are also crucial to the development of formal education and political democracy. For example, variation in indigenous actions may explain some of the variation in education and democratization between different British colonies or different French colonies (e.g., Tony Smith 1978).

However, I am not trying to explain variation among British colonies or among French colonies. I am trying to explain the differences between former British colonies and the colonies of other European powers.

I do not think indigenous peoples varied systematically between British colonies and other European colonies. For example, the Yoruba are both in Nigeria (a British colony) and in Benin/Dahomey (a French colony). Although Benin has less formal education per capita than Nigeria, this is not because the Yoruba in Benin had less desire for education. But, this difference in education rates does have long-term influence on these two societies.

Summary:

Previous scholarship suggests that British colonies were unique in a number of ways. The British ended slavery and forced labor earlier than other European colonizers and the British devolved power more gradually to their colonies. British colonies ended up with more education and infrastructure and after independence British colonies have experienced more economic growth, lower levels of corruption, and more political democracy. Although these various differences are related, I focus on trying to explain differences in post-colonial democracy.

Scholars have tried to explain the higher levels of democracy in British colonies in several ways. However, each of these explanations has weaknesses. I argued that British colonies are not more democratic because Great Britain was a democracy. France and Belgium were also democracies, but their colonies are not unusually democratic. Statistically, being colonized by a democracy does not increase the likelihood of being democratic – only being colonized by an Anglo-British society. Moreover, historical

evidence suggests that democracies often do not act democratically with people who cannot influence domestic elections. For democracies to act democratically toward non-citizens they often need citizens to defend the cause of non-citizens. Thus, while British democracy may have allowed activist to orchestrate changes in British colonialism, British democracy in and of itself is not a sufficient explanation for the prevalence of democracy in former British colonies.

The tendency for the British to leave more indigenous institutions in place also does not seem to explain post-colonial democracy. In fact, societies where the British more radically shaped institutions seem to be more democratic. Moreover, the British common law tradition does not seem to be crucial. In statistical analyses, when we control for British colonialism any positive influence of the common law tradition disappears. Nor do factor endowments seem central. In many instances British colonies started out with lower GDPs than other colonies, but their economies developed more rapidly. Scholars suggest this higher economic growth is because of the higher levels of education and more economically friendly institutions in British colonies. I argue later in this dissertation that much of the education in British colonies and some of the economically-friendly institutions can be directly linked to missionary activity. However, this argument suggests that British colonies are not more democratic because they colonized the “best” land.

What was unique about British colonies was the relation between church and state. Nonconformist Protestants were the main advocates of religious liberty. Because Nonconformists had more power in Great Britain than elsewhere in Europe, they were able to win religious liberty in British colonies earlier than in other European colonies. This

influenced where missionaries went and how much independence they had from state control. I analyze this argument in chapter two.

In chapter three, I argue that because Protestants wanted people to read the Bible in their own language, they were the main advocates of mass education. Thus, areas where more Protestant missionaries went ended up with more education. This had several long-term consequences that fostered democratization.

In chapter four, I argue that missionaries were a key bridging group between the colonies and the colonizing state. Thus, in British colonies where missionaries were more independent from state control than in other European colonies, missionaries were better able to moderate colonial abuses. Missionaries were also crucial in spurring organizational civil society. Religious liberty in British colonies allowed these organizations to flourish. Eventually indigenous elites mobilized these religious organizations to resist the colonial state. This organized pressure forced the British to give up power earlier and more gradually than other colonizers and inadvertently prepared indigenous people to run more democratic institutions.

Finally, in chapter five I analyze the impact of missionary activity on democracy quantitatively. I demonstrate that between 1965 and 1994 historic missionary activity is a more consistent predictor of political democracy than any of the factors scholars traditionally use to predict levels of political democratization.

## CHAPTER 2:

### CHURCH-STATE RELATIONS AND THE FLOW OF MISSIONARIES<sup>7</sup>

In this chapter, I analyze the church-state relations of the various colonial powers. I argue that for pragmatic and ideological reasons Evangelical and Nonconformist Protestants pressured for religious liberty in the colonies. Because of their prevalence in Great Britain, they were able to gain religious liberty in British colonies by the early 1800s. It took them much longer to win religious liberty in the colonies of countries where they had less political power.

At the same time, the Catholic Church pressured for religious preferences in the colonies of countries where Catholicism was the majority religion. The Church made agreements with colonizing states that gave the state some control over Catholic missionary work, but procured state financing for Catholics and restrictions of Protestant competitors. When secular elites gained control of the state in the 19<sup>th</sup> and early 20<sup>th</sup> centuries; this close link between the Catholic Church and the State spurred anti-clerical backlashes. In an attempt to destroy the power of the Church anti-clerical elites imposed severe regulations on religious groups that hampered both Protestant and Catholic missionary activity. As a result both Protestant missionaries and religious competition were far more prevalent in British

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<sup>7</sup> For a description of my methods and possible biases in my historical sources, see Appendix One: Evaluation of Historical Sources.

colonies than in Spanish, Portuguese, French, Belgian, and Italian colonies. Moreover, both Protestant and Catholic missionaries were more independent from state control in British colonies than in other European colonies. These two factors had a number of important consequences which I discuss in chapters three and four.

*Religious Monopolies in Historically-Catholic European Colonizers:*

Prior to Vatican II (which ended in 1965),<sup>8</sup> the Catholic Church generally fought for a religious monopoly in societies where it was the dominant religion. Church leaders fought to exclude Protestants and to gain state support for Catholic religious activity. As a result, the Catholic Church tended to be either tightly entwined with the colonial state or at war with it. On one hand, most traditionally Catholic colonizing states made (or forced) agreements with the Pope that gave them substantial control over the Catholic Church in the colonial territories (i.e., the *Patronato/Padroado* and *Concordats*). Post-colonial Latin American countries made similar *Concordats* with the Church. These agreements allowed the state to approve or submit Catholic bishops and missionaries, to collect the tithe (a religious tax), pay the salaries of the secular clergy,<sup>9</sup> and sometimes even determine which Papal edicts the church could promulgate in colonial territories (e.g., Tudesco 1980; Costa 1997; Helmreich 1964; Callahan 2000; McIntyre 1997; Sundkler and Steed 2000). In France, bishops were not even allowed to meet in groups or act in concert and religious groups were restricted

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<sup>8</sup> In Vatican II, the Catholic Church first formally recognized the principle of religious liberty and advocated the use of vernacular languages in worship and Scripture reading (Wilde 2002; Casanova 1996). This opened the way for widespread Catholic translations of the Bible into vernaculars and mass lay education.

<sup>9</sup> Secular clergy *are not* in a religious order, religious clergy *are*. Religious orders include Jesuits, Franciscans, and Dominicans. Religious orders are often directly under the Pope's jurisdiction, which is one reason anti-clerical governments regularly banned religious orders and confiscated their property.

from receiving non-state funds – which forced them to be even more dependent on the State (Tudesco 1980: 187-8; McIntyre 1997).

In exchange the Catholic Church often got a religious “monopoly” in the colonial territories. The state financed Catholic religious activity and banned or severely restricted Protestant missionaries. When Protestants were allowed to enter, they were often discriminated against. For example, Catholic education was subsidized; Protestant education was not. Catholics were given land, Protestants missions were prevented from gaining legal identity, this made purchasing land difficult (*ibid.*; Greenlee and Johnston 1999: 16-17, 34; Sundkler and Steed 2000: 286, 503-5, 638, 783-4, 817; Clarke 1997: 150-1).

These regulations gave the state substantial control over missionaries and made it harder for missionaries to fight for their distinct interests (Greenlee and Johnston 1999: 34-5). It also motivated missionaries and priests to please colonial governments – who paid their salaries and influenced their promotions. Churches could survive with little weekly involvement of ordinary people, but not without the support of the state (Gill 1998).<sup>10</sup> These agreements also stifled religious competition, which reduced missionary investment in education.

On the other hand, most independent, historically-Catholic societies experienced waves of anti-clericalism in the 19<sup>th</sup> and early 20<sup>th</sup> century. In France, Spain, Portugal, Italy, and elsewhere, when secular elites tried to gain control of the state, they felt so threatened by the Catholic Church that they tried to destroy it. They confiscated church land, kicked out religious orders, closed down seminaries, barred clergy from formal education, and closed

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<sup>10</sup> This does not mean that Catholic priests under the *Patronato Real* or the *Concordats* did not resist the state (e.g., missionaries like Bartolome de las Casas fought vigorously for native rights), but it made resistance riskier (e.g., C. Mackenzie 1993: 48-49).



religious schools (see Callahan 2000; Neill 1986; Tudesco 1980; Helmreich 1964; Grubb 1938: 163-4, 188-9; Leenhardt 1936: 34-5).<sup>11</sup>

Whenever anti-clerical forces maintained *long-term* control, they virtually destroyed Catholic missions (Tudesco 1980: 109, 185-88). For example, prior to the 19<sup>th</sup> century the Spanish dominated Catholic missions. But in 1835, the Spanish government suppressed religious congregations, confiscated their wealth, and imposed many other anti-clerical measures. This cut off Spanish Catholic missions main sources of money and personnel. Spanish missions promptly collapsed and never recovered (*ibid.*).

This cycle of suppression and mission collapse also happened in France. From 1835 to 1903, the French dominated Catholic missions, but between 1903 and 1913, Prime Minister Combes confiscated Church land, kicked out most religious orders, shut most seminaries, and closed down Catholic education. As a result, French Catholic missions evaporated never to regain much strength (*ibid.*).<sup>12</sup> Not only did this restrict missions to Spanish and French colonies, it reduced the number of missionaries with political connections in the colonizing state – the very people who could most easily pressure the home government to moderate colonial abuses. These restrictions also reduced missionaries’ political influence.

Prior to Vatican II, the incessant struggle between pro- and anti-clerical forces in most independent, historically-Catholic societies hampered the Catholic Church’s ability to apply consistent moderate pressure on colonial states. The Catholic Church often had to choose between conservative authoritarian regimes and “liberal” anti-clerical regimes that wanted to

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<sup>11</sup> Interestingly, the colonies of these historically Catholic powers also often went through strong anti-clerical phases – for example, Mexico, Uruguay, Angola, Mozambique, Zaire, and Equatorial Guinea (Browning 1928; Camargo and Grubb 1935; Isichei 1995: 344-45, 351). I have not found evidence of strongly anti-clerical phases in any former British colonies.

<sup>12</sup> In France, the collapse followed a brief upswing in French Catholic missions as priests expelled from France moved to the mission field.

destroy the Church. This made it harder for the Church to critique abuses by conservative allies. If conservatives were discredited, anti-clerical groups might come to power. Additionally, anti-clerical governments did not depend on the votes or contributions of missionary supporters. This lack of leverage restrained missionaries' ability to pressure the government and heightened missionaries' fears that if they critiqued the government, the government would further suppress them.<sup>13</sup>

Protestant missionaries had less power than Catholic missionaries in traditionally Catholic societies. Few Protestants lived in most European Catholic societies, thus Protestants were never a formidable power block. Pro-Catholic governments often banned Protestant missionaries. Anti-clerical governments often allowed Protestants to enter their colonial territories, but at best Protestants had to work under the same anti-clerical restrictions as Catholics.<sup>14</sup>

Often, Protestants faced further harassment for “denationalizing” colonial subjects. Historically-Catholic colonial powers consistently wanted indigenous peoples to adopt the language and culture of the colonizers, and thought Protestants and foreigners made this enculturation harder (Grubb 1938:194-8, 204; Cooksey 1935: 35-43; Greenlee and Johnston 1999; J. Tucker 1933a:109-10; Moreira 1935:10-11; Tony Smith 1978). As a result, many traditionally-Catholic governments restricted or banned “foreign” religious workers (e.g., France, Spain, Portugal, Italy, Mexico, Ecuador, Venezuela). However, these governments

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<sup>13</sup> This may explain why Catholic missionaries did not protest the extreme abuses by rubber companies in the Belgian Congo in which about half the population died in 20 years. Information about the abuses came almost exclusively from Protestant missionaries (Hochschild 1998; Sundkler and Steed 2000: 284-6). In the early 20<sup>th</sup> century, anti-clerical governments were spreading through Europe and Latin America and the French were systematically destroying the Catholic Church there. I assume Catholic missionaries feared that if they protested, they might lose one of their few remaining allies in Europe.

<sup>14</sup> Occasionally (and for limited periods of time), some liberal governments in Latin America favored Protestants as a way to restrict Catholicism (e.g., in Guatemala, see Garrard-Burnett 1998).

generally only applied this ban to Protestants, not Catholics (Grubb 1938: 15, 173, 176-8, 198; Cooksey 1935: 38-9; Moreira 1935: 10). Protestant colonizers (e.g., Great Britain, U.S., New Zealand, Australia, and Denmark) were less concerned about enculturation and did not have the same tight restrictions on non-national missionaries.<sup>15</sup>

Because there were so few Protestants in historically-Catholic European societies, restrictions on foreigners severely hampered Protestant work, which in turn allowed these governments to partially control Protestant activity. For example, in France prior to 1905, the state appointed principal French Protestant officials and paid the salaries of French Protestant clergy (McIntire 1997: 274, 294). Moreover, well into the 20<sup>th</sup> century, the French government asserted ownership of all church property and the right to revoke its usage whenever the state desired. They also forbid clergy from engaging in any political acts, from speaking against public officials, and from doing anything to resist the laws and decrees of public authorities (McIntire 1997: 234-5). Thus, although France was a democracy, even national Protestant clergy had limited ability to critique colonial abuses.

As part of their enculturation schemes, historically-Catholic colonizers also often banned vernacular literature (i.e., French Spanish, Portuguese, Italians – see Johnston 1888: 537; WMC 1910d: 73; Warnshuis 1923: 10, 21; Grubb 1938: 325; Leenhardt 1936; Moreira 1936: 49-51). Post-colonial Latin American societies also often banned the vernacular (e.g., Garrard-Burnett 1998: 68-71). Thus, vernacular literature developed primarily in historically-Protestant colonies. Many historically-Catholic colonizers also blocked the development of indigenous clergy (Neil 1986: 149; Sundkler and Steed 2000: 503). This limited the number of indigenous leaders able to effectively resist colonialism.

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<sup>15</sup> The Dutch and Germans are middle cases. Each had two state churches (one Protestant and one Catholic) and both governments exercised far greater control over missionaries than the Anglo-Danish colonizers listed above (Clarke 1997: 141; Rauws 1935; Van den End 2001a: 2001b; Parsons 1971; WMC 1910d: 62-3, 137-39).

Most historically-Catholic colonizers assumed religion was closely connected to government (as it had been in their experience) and feared Protestantism was a precursor to British colonial influence (Leenhardt 1936: 16-17; Warnshuis 1923: 8, 28; Greenlee and Johnson 1999: 17, 34). Thus, Protestant missionaries felt continual pressure to demonstrate that neither they nor their converts were fostering political turmoil (*ibid.*, Tudesco 1980: 130; WMC 1910d: 85; Warnshuis 1923: 22, 30-3). International Missionary Council (IMC)<sup>16</sup> publications about French, Belgian, Spanish, Portuguese and Italian colonies are littered with statements about proving loyalty and making church members better citizens. This rhetoric is rarer in IMC discussions of British colonies, presumably because missionaries felt more secure (see e.g., WMC 1910d: 60, Moreira 1935; 1936: 98-9; J. Tucker 1933b: 200). Missionaries were far more open about their criticism of abuses in British colonies than in other European colonizers (Greenlee and Johnston 1999: 35-38).

Because of their lack of power, Protestant missionaries were more vulnerable to the whims of colonial officials and had to spend more effort currying favor and proving their loyalty – they could not pressure colonial governments to rein in hostile officials (e.g., see Warnshuis 1923: 13; Grubb 1938: 188-9, 205-6; WMC 1910d, 85-6; Greenlee and Johnston 1999: 17, 34-5). They also had less ability to fight for their interests. Thus, for example, concessionaire companies in both French Congo and in Portuguese colonies prevented Protestant missionaries from entering their territories well into the 20<sup>th</sup> century. The British East India Company (BEIC) had also tried to keep out missionaries, but missionary supporters forced the BEIC to allow free access from 1813 on (Warnshuis 1923: 12, 28; Grubb 1938: 206-7; Moreira 1936: 43-8; Frykenberg 1999: 181).

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<sup>16</sup> The IMC developed out of the Continuation Committee of the 1910 Edinburgh World Missionary Conference. It was designed to coordinate Protestant missionary efforts, monitor restrictions on religious liberty, and negotiate with governments on behalf of diverse missions organizations.

*Religious Liberty in British Colonies:*

In Great Britain, Nonconformists had greater influence than in other European societies. Nonconformists were too diverse for any one of them to maintain a religious monopoly. They also believed that individuals were responsible before God alone for their salvation. Salvation did not come via membership in a group or participation in a sacrament; it came from “true faith” in Christ. Thus, “true religion” could not be imposed by a state, or ethnic group, or family. As a result, they pressured for religious liberty at home and in the colonies (Hamburger 2002, Cox 1997; Walls 1996a; Bradley 2001).

Thus, in British colonies missions developed as robust voluntary organizations. They had their own finances, leadership selection, transport, and journals. Their massive journal circulation gave them power in the battle for British public opinion, and allowed them to frame issues for their constituents (e.g., Walls 1996a: 251-2; Stanley 1990: 111-12).

These mission resources left the state few unobtrusive ways to control missionaries. Unlike in other European colonies, the British colonial government could not withhold missionaries’ salaries, hamper their careers, block their passage, or frame issues in the press unchallenged. After the 1830s, they never confiscated mission land, barred graduates of Protestant schools from getting government jobs, or blocked missionaries from building new schools and churches. The exception to this is Muslim areas of colonies and in protectorates where indigenous rulers were hostile to Christianity. The British occasionally imprisoned, expelled, or sued individual missionaries who challenged colonial interests, but seldom without a response (e.g., Oddie 1978; 1999; Rooke 1978-79: 54-55; Blouet 1990: 638; C. Mackenzie 1993; Langworthy 1996: 448-58). Punishments in British colonies never severely

limited missionaries' ability to convert people or expand their work. As a result, missionaries feared the British less.

Protestants also had a strong power base in England, influence in both major parties, and prominent political leaders who supported them, including prominent members of Parliament such as William Wilberforce and Thomas Fowell Buxton, leaders of the Colonial Office such as Lord Glenelg and James Stephen, and even Prime Minister William Gladstone. These connections and voters gave missionaries the means to influence the state. If a colonial official interfered with mission interests, missionaries could inform their supporters and mount a formidable pressure campaign (e.g., Greenlee and Johnston 1999: 36-8; Ingham 1956: 11; Oddie 1978; Miller and Stanczak 2000, Heuman 1994; Rooke 1978-79). Even in published accounts, missionaries talked openly about restricting unfavorable *British* government officials (e.g., WMC 1910d: 60, 80; Oddie 1978; Greenlee and Johnston 1999: 35-7). Occasionally the missionary lobby even got colonial governors fired for abuses against indigenous people (e.g., Governor Eyre of Jamaica, see Heuman 1994; Russell 1993; also see Rooke 1978-79: 55). They were more circumspect about criticizing colonial policy both before they had legal permission to work in British colonial territories and in other colonies where their tenure was less secure (e.g., Miller and Stanczak 2000; Greenlee and Johnston 1999: 34-38).

#### *Government Regulations and the Flow of Missionaries:*

Because of the relationship between church and state in historically-Catholic European colonizers, these colonizers were able to maintain more regulations restricting religious

groups. These regulations had a strong influence on where Protestant missionaries went and what both Protestant and Catholic missionaries accomplished.

*Directly Blocking Protestant Missionaries:* Historically-Catholic colonizers often directly blocked Protestant missionaries. For example, the Italians banned Protestant missionaries from *entering* their territories. Missionaries who were in Eritrea and Libya prior to Italian colonization could stay, but once they left the colony, could never return. The Italian government did this even when the Protestant missionaries did not come for a competing colonial power. For example, in Eritrea, the Protestant missionaries the Italians banned were Swedish – Sweden had no colonies at the time and no colonial tradition outside Scandinavia. At the same time the Italian government barred entry to Protestant missions, they encouraged work by Muslims and Italian Catholic missionaries (Cooksey 1935; McLeish 1927 184-7; Trimmingham 1950: 19-20).

Similarly, well into the 20<sup>th</sup> century the French banned Protestant missionaries from entering French Indo-China, French Equatorial Africa, French territories in the Americas, and so on (Pruett 1938: 285; Thiessen 1961: 64, 426, 455; Jennings 2000: 201; Dennis, Beach and Fahs 1911). In other places, the French harassed Protestant missionaries into abandoning pre-existing stations – for example Tahiti, and to a lesser extent, Madagascar (Greenlee and Johnston 1999: 16-22; Sundkler and Steed 2000: 502-9). The Spanish also banned Protestant missionaries or harassed them into leaving their colonies (Isichei 1995: 187; Thiessen 1961: 221, 327, 435, 451; “Nazara” 1935). The Portuguese kept Protestants out of Guinea Bissau, Principe and São Thome, East Timor and so on (Beach and Fahs 1925; Clarke 1997: 151; Thiessen 1961: 218, 220, 325). Although the Portuguese allowed

Protestants to enter Angola and Mozambique, they banned Protestant mission stations from working near Catholic missions – generally about 20 miles – and kept them out of territories granted to concessionaire companies (Moreira 1935; 1936: 43-50).

*Diverting Protestant Missionaries with Regulations:* Regulations by historically-Catholic colonizers also diverted Protestant missionaries. For example, the French, Spanish, Portuguese, Italians and many independent Latin American countries required all education and printing to be in the colonial language (i.e., French, Spanish, etc.) (Johnston 1888: 537; WMC 1910d: 73; Warnshuis 1923: 10, 21; Grubb 1938: 325; Leenhardt 1936; Moreira 1936: 49-51; Garrard-Burnett 1995: 70).<sup>17</sup> The French, Portuguese, Italians, and some independent Latin American countries<sup>18</sup> banned all proselytizing outside designated religious structures (i.e., no religious teaching in schools, homes, or the open air) (Camargo and Grubb 1935: 73-4; Leenhardt 1936: 23-40; Grubb 1938: 172; McIntire 1997). The French and Mexicans banned all education in churches and all religious education (WMC 1910d: 72, 86; Warnshuis 1923: 9, 31; Camargo and Grubb 1935: 73-4; Grubb 1938: 171-2; Sundkler and Steed 2001: 502-5; McIntire 1997). The French, Portuguese and Italians required missionary teachers and doctors to have teaching and medical degrees from the colonial country (i.e., France, Portugal, or Italy respectively) (Warnshuis 1923: 25; Moreira 1936: 54; Grubb 1938:

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<sup>17</sup> Some colonial administrations made exceptions for the first two years of education and for printing Bibles and hymnals (which could be in a diglot version with both the indigenous language and the colonial language printed). This substantially increased printing costs. The fact that many post-colonial Latin American governments were averse to allowing printing or education in indigenous languages suggests that the emphasis on vernaculars grew out of Protestantism.

<sup>18</sup> Although these Latin American countries were no longer colonies, I include them to demonstrate that this pattern of state supported Catholicism, followed by anti-clerical crackdowns on all Christian groups is virtually universal across historically-Catholic societies. Although Mexico and Uruguay were the most virulently anti-clerical, many Latin American countries had similar anti-clerical laws.



191, 198).<sup>19</sup> Most historically-Catholic colonizers also required extensive government approval before building a new church or schools (*ibid.*, Camargo and Grubb 1935: 73-4; Leenhardt 1936: 24; J. 1933a: 113).<sup>20</sup> The French even restricted the size of gifts people could give to missions. After 1813, the British government was not able to be so restrictive.

Most Protestant missionaries were native English speakers (Hutchison 1987: 93; Dwight 1905; Parker 1938). Thus, to gain the required linguistic fluency and recognized academic degrees to work in French, Spanish, Portuguese, or Italian colonies, missionaries often had to spend several years studying in Europe before heading to the mission field (Grubb 1938). If missionaries entered British colonies instead, they could start immediately and work with fewer restrictions. As a result, Protestant missionaries tended to go to British colonies and British colonies had far more Protestant missionaries per capita (e.g., Warnshuis 1923: 8; Leenhardt 1936: 2, 23; J. Tucker 1933b: 195). In 1925, the mean British colony had 4.26 times as many Protestant missionaries per capita as the mean colony of France, Spain, Portugal, Belgium or Italy ( $p \leq .000$ ).<sup>21</sup>

This difference is consistent in different regions of the world. Moreover, this difference is *not* because British colonies were more geographically accessible. For example, on

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<sup>19</sup> They sometimes made exceptions if doctors only worked with indigenous people and did not charge fees.

<sup>20</sup> For example, to build a new church the French required a signed petition by 80 local residents and approval by the local governor. Missionaries often had difficulty getting 80 local people to invite them into new areas because they were not allowed to preach outside of existing religious structures. Many governors refused permission even when given valid petitions. The Portuguese required all schools and churches to be built of stone in a Western style. This greatly increased the cost of moving into a new territory and restricted mission growth. Elsewhere, missions regularly used structures made of local materials (wood, mud, thatch). They also taught school in church buildings and *visa versa*.

<sup>21</sup> In 1925 there is no statistically significant difference in the number of Protestant missionaries per capita in colonies of these various historically Catholic powers. The British figure is from colonies that were primarily colonized by the British. If we use the figures from colonies that were last colonized by the British (which includes some German and Ottoman colonies) – there were 3.84 times more missionaries per capita in British colonies. The colonies of other historically-Protestant countries have significantly *more* missionaries per capita than the British.

missionary maps of West Africa, there are many Protestant mission stations in the British colonies of Ghana/Gold Coast, Nigeria, and Sierra Leon, but almost none in the Portuguese and French colonies on the same coastline (e.g., Beach and Fahs 1925). However, differences in the prevalence of Protestant missionaries and the regulations missionaries worked under had important consequences for education, moderation of colonial abuses, and development of organizational civil society. I will discuss these in chapters three and four.

## CHAPTER 3

### PROTESTANT MISSIONS AND THE EXPANSION OF COLONIAL EDUCATION

In the previous chapter I argued that church-state relations influenced where Protestant missionaries went and how much control the state had over all forms of missionary activity. In this chapter I demonstrate the impact this had on education rates in nonwestern societies. Protestant missionaries were central to the development of mass Western formal education outside the West. This is because Protestants wanted people to be able to read the Bible in their own language. Thus, unlike other groups, wherever Protestant missionaries went, they almost immediately began mass education campaigns and pressured the state to invest in mass education as well. When threatened with Protestant competition, other religious groups also invested in mass education. As a result, British colonies and other areas with large numbers of Protestant missionaries ended up with more formal education per capita. This early mass education had a number of long-term consequences that helped foster post-colonial democratization.

#### *Elite Interests and the Development of Formal Education in the Colonies:*

Protestant missionaries promoted mass formal education in the colonies because it helped them meet their religious goals. Other groups had less incentive to finance mass education in the colonies, and thus did less of it. I argue that four key Western interest

groups shaped colonial educational policy: colonial government officials, business people, settlers, and missionaries. In this section, I examine each in turn.

*Colonial Governments:* Colonial governments initially had little incentive to foster mass education. At best, it was expensive and cut revenues; at worst, it fostered rebellion.

Colonial governments needed some educated indigenous people to translate and help run the local government, but colonial governments preferred small, educated elites that they could control and tie to the interests of the colonial state. If education spread further, government officials primarily wanted it to be “practical” education, such as carpentry, masonry, and horticulture (Kelly 2000b; 2000d; Sundkler and Steed 2000: 636-45; Manning 1998: 98-99; Furley and Watson 1978: 32, 47, 137-8, 162, 192-3; Brown 2000; Taylor 1984: 191; Isichei 1995: 269).

For example, in Vietnam, the French colonial governments closed down indigenous schools, pressured the Japanese government to block Vietnamese from getting education in Japan and – as an explicit policy – educated only as many Vietnamese past elementary school as the colonial government could hire – and thus control (Kelly 2000b; 2000d). The French focused education on practical skills (particularly farming), and avoided training Vietnamese skills that would let them compete with French settlers for senior positions in the colonial administration. They feared that both mass education and education without state-controlled content would foster rebellion. They even blocked most Vietnamese from going to France for education for fear they would pick up socialist and democratic ideas (Kelly 2000b; 2000d).

The French also restricted Protestant missionary education in the colonies and prevented education in religious buildings. For example, before the French invaded Madagascar, over 90% of all education took place in church buildings. The French promptly shut this down, forbidding churches to even teach people how to read in Sunday school (Sundkler and Steed 2000: 502-6). The French government tried to set up their own educational system, but this generally lacked resources. Through out Africa, the French educated only a small elite, and the French purposely trained this elite to be distinct for other Africans in language and culture (Kelly 2000c; 2000e; Grier 1999; Tony Smith 1978; Beach and Fahs 1925: 194). The Italians, Portuguese, and Spanish also educated only a small portion of the non-European population (e.g., Moreira 1936: 50-1; J. Tucker 1933a: 1933b; T. Tucker 1966; Beach and Fahs 1925: 195; Isichei 1995).

Similarly, the British made little effort to educate colonial subjects prior to missionary agitation. The British tried to run their colonies as cheaply as possible (Stanley 1990: 47-8; Ferguson 2002) and mass education increased their expenses. Later, however, missionaries allowed the British to “service” their colonies cheaply (*ibid.*, C. Mackenzie 1993).

In areas with little missionary influence, the British invested little in education. For example, they kept missionaries out of Nepal, Sikkim, Bhutan and most of the predominantly Muslim areas, such as northern Ghana, northern Nigeria, British Somaliland and the Persian Gulf (Beach 1903; Lindell 1997; Sundkler and Steed 2000; Barnes 2002; Kilby 1969: 236-37; Thiessen 1961: 306). If the British administration wanted mass education, they could have financed mass secular or Muslim education in these areas, but they did not. When freed from missionary agitation, British colonial administrations preferred to work with existing elites and primarily educated the children of these elites. Thus, the areas of British colonies

and protectorates where missionaries were restricted, lagged far behind in education (Sundkler and Steed 2000; Furley and Watson 1978; Barnes 2002; Kilby 1969: 236-37; Lindell 1997: 71-2; Buchman 2000: 1356).

In areas with high missionary influence, the British could not avoid mass education. Thus, the British government tried to shape education content and channel it towards their interests. They created financial incentives for missionaries to educate fewer students more intensely, use the English language in their education, and teach a utilitarian, government-created curriculum. They encouraged missionary mass education to focus on practical skills (e.g., Taylor 1984; Furley and Watson 1978; C. Mackenzie 1993; Ingham 1956). In effect, this helped create a smaller elite and a broader pool of English speaking laborers who had skills needed by British companies and planters – carpentry, masonry, etc. It also focused educational content on topics the government thought were less likely to stir unrest.

However, colonial officials often distrusted missionary trained “natives,” whom they considered “de-tribalized” or “de-nationalized.” When given the choice, they generally preferred to work with elites who had not been “tainted” by missionary education (e.g., Isichei 1995: 226-7, 236, 264, 341; Sundkler and Steed 2000: 651; Barnes 2002; Stanley 1990: 135-36, 153; Ferguson 2002: 203-215).<sup>22</sup> All these factors suggest that the British government was not uniquely interested in education; left on their own, they presumably would have behaved similarly to historically-Catholic colonizers.

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<sup>22</sup> This policy helped create instability in post-colonial societies like Nigeria. Missionary trained southern Nigerians dominated trade and the lower-levels of the bureaucracy, but Northern Muslims dominated senior positions in the military. This resulted in a series of post-colonial pogroms of Christian business people in the North, and instability accentuated by Muslim military dictators dominating largely southern Christian bureaucrats.

*Business Elites:* Business elites also wanted a small educated population to work as translators and clerks in their companies and a broader population of laborers conversant in the colonial language and with skills in various crafts – such as masonry and carpentry. However, they did not want to finance broad education, as this cut into profits (e.g., J. Tucker 1933a: 85; C. Mackenzie 1993; Ingham 1956: 56-61).

*Settlers:* European settlers were generally the most averse to indigenous education. They wanted to maintain their distinction with indigenous people and to maintain control of the senior positions in the colonial government. Thus, they strongly opposed post-elementary education of indigenous people and wanted this education to focus on practical skills – farming, construction, etc. – rather than academic and administrative skills (Kelly 2000b; 2000d; Sundkler and Steed 2000: 636-45; Furley and Watson 1978: 87-88; Brown 2000; McLoughlin 1990; J. Tucker 1933a: 85; also see Rooke 1978-79). Slave owners and those who used unskilled and forced labor were especially averse to education. They often opposed even teaching slaves how to read (e.g., Rooke 1978-79; Blouet 1990).

*Missionaries:* Protestant missionaries had different interests; they wanted people to read the Bible in their own language. As a result, whenever they entered a new territory they almost immediately began developing written forms of oral languages, translating the Bible into these languages, and educating large segments of the population (Sanneh 1989; Walls 1996b;

Daniel and Hedlund 1993; C. Mackenzie 1993; Rooke 1978-79; Beaver 1966; Furley and Watson 1978; Ingelby 2000; Ingham 1956: 96-109; Sundkler and Steed 2000: 636-45).<sup>23</sup>

Moreover, Protestant missionaries generally wanted more than literacy, they wanted educated indigenous lay leaders and clergy (e.g., Taylor 1984: 196; C. Mackenzie 1993; Case 2003). They also thought academic Western education would undermine “superstition” and help create the foundation for conversion to Christianity (e.g., Kooiman 1996: 158-59). Finally, missionaries believed that all people have a common origin, were created in God's image, and are equally redeemable. This made missionaries resistant to the prevailing 19<sup>th</sup> century anthropological ideology that dark skinned people were incapable of abstract thought and thus could not be “civilized” through education (Levy and Peart 2002; Cox 1997; Stocking 1987; 1995: 35-7; Rooke 1978-79; van der Veer 2001: 134-55; Tucker 1925: 82; R. Tucker 1983: 140; Stanely 1990: 162-63).

Thus, Protestant missionaries almost always wanted to promote at least some advanced academic education and resisted pressure from states and settlers to focus primarily on practical education (e.g., Furley and Watson 1978: 162, 192-3; Tucker 1925: 82-85; Case 2003). Furley and Watson (1978) write:

More significant were the disagreements between government and missions over the development of secondary education. The missions had always believed in the value of a general education up to a good standard for as many people as possible, but the [British] government, aware that it was a colonial authority with a virtual “closed” expatriate bureaucracy, was dubious about the effect of turning out increasing number of well educated Africans (p. 192-3; also see Taylor 1984: 196).<sup>24</sup>

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<sup>23</sup> Using indigenous languages also facilitated mass education. It takes less time to teach people to read their own language than to read a foreign one – in that case, students must learn both the foreign language and literacy at the same time (Grier 1999; Garrard-Burnett 1998: 70).

<sup>24</sup> Interestingly, post-Civil War education of African-Americans in the U.S. follows an identical pattern. Southern white elites, the national government and non-Evangelical Northern philanthropists all wanted black education to focus on practical skills. Among whites, it was primarily Evangelical missionaries who promoted



Missionaries were also important to the expansion of Western education in non-colonies, for example, Siam/Thailand, Japan, China, Persia/Iran, and the Ottoman Empire. This advocacy of education outside European colonies suggests that missionaries were not merely supporting some British colonial educational agenda – they pursued mass education for their own reasons. In both colonies and non-colonies, missionaries created model schools that governments and other religious groups copied. Missionaries also wrote and translated textbooks, and trained the early teachers that allowed the later expansion of non-missionary school systems. In their indigenous language journals missionaries repeatedly stressed the importance of Western education for national development and encouraged indigenous states to finance educational systems. Historical evidence suggests that they had a powerful influence on early educational reformers in these societies (*Siam/Thailand*: Wyatt 1984: 177; Sindhuprama 1988; Swanson 1982; *Japan*: Drummond 1971: 153-55; *China*: Tsou 1996; Dunch 2001; Fairbank 1974; 1985; Bennet 1983; Bohr 2000; Stanley 1990: 138-42; *Persia/Iran*: Farmaian 1992: 56-60; *Ottoman Empire/Middle East*: Kaplan 1995: 16, 25).

Prior to Vatican II, the Catholic Church did not encourage lay people to read and interpret the Bible. The Catholic *magisterium* interpreted Scripture for the Church in the light of Church tradition. Catholic leaders could read the text in Latin. Thus, prior to Vatican II, Catholic missionaries seldom translated the Bible into local languages (e.g., Pruett 1938; Neill 1986; Ingham 1956: 97-8; Manning 1998: 98; Wilde 2002; Garrard-Burnett 1998) and put less emphasis on mass education. Generally, they did not foster *mass* education unless

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academic education for blacks and thus, built many of the leading African-American colleges. The missionary emphasis on training the “talented tenth” was later picked up by W.E.B. DuBois (Case 2003; Latourette 1949: 24-5).

they were competing with Protestants or a secularist state that used education to attack Catholicism – for example, France (Sundkler and Steed 2000: 286; Clarke 1997: 152; Browning 1938; C. Smith 1991; Gill 1998; Dunch 2001: 3; Drummond 1971: 313; James 1989a: 12, 14).<sup>25</sup> Catholics often trained the elite and often had the best schools even in British colonies, but this is different from mass education.

*Religious Competition:* The British government also allowed more religious competition in their colonies. Competition forced religious groups to transfer more resources to indigenous people for fear that if they did not, others would “win” converts. Consequently, Methodists feared that if they did not educate a particular group, perhaps the Catholics would, and *vice versa*. This fear spurred them to invest in education beyond what they would have otherwise invested (Stough 1933; Furley and Watson 1978; Dunch 2001: 40; also see James 1989a; 1989b; 1989c; Taylor 1984; Kooiman 1996: 159). Competition also allowed indigenous people to play missions groups off against each other – no one religious group had a monopoly on education or Western technology. Indigenous leaders could resist or facilitate different missions entering their territories and attend or convert to traditions that best suit their interests. Education and medical work were two things missionaries could provide that induced indigenous leaders to let them enter their territory (e.g., C. Mackenzie 1993; Swanson 1982; Storm 1938). Competition also increased the quality of education because different religious groups and the state vied to gain influence with indigenous elites (e.g., Furley and Watson 1978: 52; Dunch 2001: 40).

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<sup>25</sup> Catholics often developed extensive educational systems when they were a religious minority in a Protestant dominated society – as in the United States – or when the national government was controlled by Protestants – as in pre-independence Ireland and in Quebec. But this was a reactive rather than a generative process. The goal was partially to defend Catholics against Protestant and secular teaching that might undermine their Catholicism.

*Impact of Missions on British Education Policy:*

Much of the British government's funding of education in the colonies also resulted from Protestant missionary pressure. Prior to 1813, the British spent almost nothing educating their colonial subjects. For example, British East India Company (BEIC) schools in India trained a total of only a few hundred students – almost exclusively elite Muslims and Hindus from the highest castes. In fact, lower-caste Hindus were explicitly banned from company schools (e.g., Ingham 1956: 57, 71). However in 1813, the mission lobby threatened to block passage of the BEIC charter and forced the BEIC both to allow missionaries to enter India and to spend a substantial portion of their revenues on indigenous education (Ingham 1956: 11, 59; Miller and Stanczak 2000: 13). It took ten years for the BEIC to earn enough profit to pay for this education. Every 20 years, when the BEIC charter came up for renewal these activists forced them to spend more money on education. Missionary groups were able to apply for these education funds and unlike BEIC schools, missionary schools were open to all castes, races, and economic backgrounds (e.g., Ingham 1956: 71; Oddie 1969: 274). After 1854, this educational funding developed into the British government's grant-in-aid system: educational grants that *any* religious group could apply for (Ingham 1956: 11, 59; Porter 1988). Thus, missionaries and their Evangelical supporters initiated state supported education in British colonies 20 years before state supported education was implemented in England (Ingham 1956: 59).

However, these education subsidies were a small part of the colonial budgets until 1923. Then in 1923, the International Missionary Council arranged an agreement with the Colonial Office, the Ministry of Education, and British colonial governors that greatly expanded

government financing of education (Sundkler and Steed 2000: 637, 643). Thus, although the British provided more funding for education than other colonizers, much of this was also a direct result of Protestant missionary pressure.

Nonconformists fought to procure educational funding for all Christian groups, not just the state church or local religious groups. Once the British government began subsidizing mass education, pragmatic and ideological considerations channeled them to fund indigenous education institutions – such as those run by Muslims and Hindus (Cox 1997; van der Veer 2001; Ingleby 2000). If the state funded only Christian educational institutions, this created local resentment – something the colonial government wished to avoid. Thus, as indigenous religious groups formed educational institutions, they also received government subsidies as long as they accepted government oversight and met certain standards (e.g., Cox 1997: 348; Ingham 1956: 65).

Fear that their children would convert to Christianity and resentment over missionary initiated social reforms (such as the fight to end female genital cutting in Kenya), spurred indigenous groups to form their own educational institutions (Cox 1997: 348; Furley and Watson 1978: 174-5; Ingham 1956; Oddie 1969: 284; Kark 1995; Ingleby 2000: 304; James 1989c: 64-5; Kooiman 1996: 159) and to pressure the British government to establish state schools in which Christian religious instruction was excluded (e.g., Ingleby 2000: 333). This increased the supply of schools and expanded the population who were willing to pursue Western education. However, missionary trained personnel enabled these later expansions of government and indigenously controlled educational systems. Missionaries trained the early teachers and missionary's students demonstrated the economic advantages of Western formal

education – which increased indigenous demand for education (e.g., Furley and Watson 1978; Ingham 1956: 61-66, 83; Swanson 1982; Wallace 1938).

Missionaries were especially crucial to expanding the teaching of Western subjects (e.g., modern science, engineering, Western medicine, and European languages) because non-missionary institutions had difficulty recruiting a regular supply of dedicated and qualified Western teachers. Even when the British government and trade companies tried to expand the teaching of Western subjects, so few Europeans were willing to go to the colonies to teach at non-missionary schools that these efforts were often failures. Because of the low quality, dropout rates at government schools were initially extremely high. Thus, for example, the central school for the Madras Presidency (i.e., British South India) had produced only five qualified teachers by 1833 (Ingham 1956: 65-66).

*Missions and the Quality and Content of Education:*

Protestant missionaries also adjusted the quality and content of colonial education in British colonies. Protestant missionaries wanted vernacular education and printing. The British government was initially wary of vernacular education and publications – the British feared they would have more difficulty monitoring the content of vernacular education and publications and thus vernacularization might foster resistance movements (Ingham 1956: 105). Historical evidence suggests they were right (e.g. Deol 2000).

Missionaries also wanted a large supply of trained indigenous teachers. Indigenous teachers were not as good at enculturating colonial subjects into the colonial culture (a goal of colonial governments), but indigenous teachers were great for rapidly expanding education cheaply (a goal of Protestant missionaries). Data from Beach and Fahs (1925) suggest that

missionaries trained 7.17 times as many teachers per capita in British colonies than in historically Catholic colonies (i.e., French, Spanish, Portuguese, Italian, and Belgian) ( $p \leq .001$ ). Both vernacular education and widespread indigenous teachers facilitated Protestant missionaries' goal of rapidly increasing the number of people who could read the Bible in the language of their heart.

The French, Spanish, Portuguese, and Italians wanted to enculturate loyal subjects, thus they forced all education to be in the colonial language and tried to import teachers from the colonizing state. Foreign teachers who did not come from the colonizing state often had to have teaching degrees from the colonizing state and be fluent in the colonial language. Indigenous teachers also had to pass rigorous exams about the colonial language and culture (e.g., Johnston 1888: 537; WMC 1910d: 73, 86; Warnshuis 1923; Cooksey 1935: 35-43; Moreira 1935;1936: 49-54; Leenhardt 1936; Grubb 1938: 191-2 198-207; 325). As mentioned above, governments had difficulty recruiting a large supply of qualified European teachers to work in the colonies – few were willing to go, other than missionaries. Requiring indigenous teachers to have high foreign language skills also limited the supply of teachers and made it harder to recruit teachers to work to rural areas. This restricted the expansion of secular education.

Moreover, because students had to learn to read in a foreign language while learning that foreign language, schooling was more inefficient – fewer students learned to read during their time in school (Grier 1999) and far more students dropped out. For example, Corbett (1972) found that in French African schools, only a third of the students that started first grades completed primary school, whereas in English African schools, three-fourths of

students did. He attributes the difference in drop out rates to the difference in the language of instruction (p. 30).

Finally, because missionaries trained teachers, developed model schools that others copied, and created early textbooks, missionary education influenced the teaching style in later state systems (C. Mackenzie 1993). Missionaries were especially important in introducing education that emphasized critical thinking rather than rote memorization of classic texts (e.g., Ingelby 2000; Bennett 1983; Dunch 2001; Drummand 1971; Ingham 1956; Wallace 1938; Kuran 1997; Swanson 1982).<sup>26</sup> The Turkish economic historian Timur Kuran (1997) suggests that the late and anemic arrival of this type of education in Muslim societies partially explains why Muslim societies fell behind economically and have produced few modern contributions to science.

Vernacular education increased learning in early grades and increased actual attendance. Training more indigenous teachers presumably decreased student teacher ratios and increased the supply of qualified teachers in rural areas. Teaching critical thinking also presumably increased the quality of education. Because in our statistical analyses we can only compare school *enrollment* rates between societies – not school attendance, educational quality, or educational content – this may mask differences in the quality of education between societies that have long-term economic and political consequences.

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<sup>26</sup> Missionaries also used some rote memorization in their education. These authors merely argue that missionaries used less of it than the other educational options.

*Between-Country Differences in Education:*

Up through the 1930s, school enrollments in British colonies were four to five times higher than in other colonies (Kamens 1988: 120).<sup>27</sup> This colonial education provided post-colonial governments with school buildings, books, and skilled teachers. Most research suggests that literacy rates and school enrollment rates in former British colonies still tend to exceed these rates in other former colonies (e.g., Kamens 1988; Clarke 1997: 121; Brown 2000; Grier 1999). In fact, in Africa the difference in enrollments between former British colonies and other former colonies has increased over time (Brown 2000). However, historical evidence suggests that missionaries initiated much of this education, provided more of it than the state, and trained most of the teachers. Thus, perhaps missionaries are the crucial factor, not British colonialism.

*Within-Country Differences in Education:*

Within-country differences in educational rates also confirm the importance of missionary activity. If British colonial policy caused the higher education rates in British colonies, we would expect consistently high education rates between and within British colonies, regardless of where missionaries worked or people converted – but this is not the case. Education rates were higher in the areas of British colonies where more missionaries worked and where more people converted to Christianity. For example, the British barred missionaries from many areas with Muslim rulers well into the 20<sup>th</sup> century. Muslims also

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<sup>27</sup> The data in Benavot and Riddle (1988) suggest that colonies of historically-Protestant powers – such as the British – consistently had higher primary school enrollment rates than colonies of historically-Catholic powers. This is true in every available year of data (i.e. 1870 – 1940) in every region of the world: the Caribbean, Central America, South America, Asia, and Sub-Saharan Africa. The only French colonies in the sample that approach the enrollments rates of British colonies are Lebanon and Madagascar – both countries that had strong Protestant missionary movements and large Christian populations prior to French colonization.



resisted Missionary education even where it was available. Thus, Muslim areas of British colonies received less formal education during the colonial period and still consistently have lower education rates (e.g., Sundkler and Steed 2000: 650-54; Isichei 1995: 272-73; Thiessen 1961: 306).

In Ghana and Nigeria, the British kept missionaries out of the Muslim North. Because missionaries had a virtual monopoly over education in Britain's African colonies, education in the North suffered (Isichei 1995: 270-73; Sundkler and Steed 2000: 650-51; Barnes 2002; Kilby 1969: 236-37). Even into the 1940s, missionaries controlled 99 percent of the schools and trained 97 percent of the students in Nigeria. Thus, by 1951 only one northern Nigerian had a full university education (he was Christian) and in 1952 only 1.4 percent of the mainly Muslim northern region were literate in Roman script – compared to 16 percent and 18 percent in the Eastern and Western regions where missionaries were allowed (Isichei 1995: 272). Similarly, in Ghana only 4 of the 213 government-subsidized schools were in the north and education rates are still substantially lower there than in the Christian and animist South (*ibid.*; Kilby 1969).

Lower education rates in Muslim areas not merely a result of distance from the coast. In Kenya the Muslims are on the coast but education rates are higher in the interior where more missionaries worked and more people converted (Sundkler and Steed 2000: 650-54; Furley and Watson 1978; Buchman 2000: 1356). The same pattern holds among Muslims in Malawi, Uganda, India, and elsewhere (Sundkler and Steed 2000: 652; Useem 1998a; 1998b; Prasad 1999: 26; Ingleby 2000: 284, 311).

Lower education rates among Muslims are also not because colonial governments favored Christians and “animists.” Most historical evidence suggests that the British, French,

Italians, and Germans all favored Muslims – who were considered more loyal than mission influenced Christians – and wherever possible, funded Muslim education rather than missionary education (Sundkler and Steed 2000: 650-54; Barnes 2002; McIntire 1997: 288, 297; Trimmingham 1950: 19-20; Stanley 1990: 136, 153; Isichei 1995: 233, 272-3; Walls 1982- also see Ingham 1956: 57).<sup>28</sup>

However, this pattern is not limited to Muslim areas. Missionaries were kept out of Hindu and Buddhist Nepal, Sikkim, and Bhutan (all British protectorates), and formal education rates there continue to be lower than in neighboring India (Bista 1991: 116-132; Lindell 1997).

Even within India, literacy rates are significantly higher in areas with more Christians and in areas where the missionary maps suggest more missionary activity took place.<sup>29</sup> In Table 1 we see that the percentage Christian seems to increase the number of students per 1000 population-age-5-and-over in the provinces of British India in 1931. Even with only thirteen cases and three dependent variables, the percent Christian is marginally significant and in the predicted direction ( $p \leq .1$ , two-tailed test). This association exists even though what is now Kerala was excluded (it was then made up of princely states) and the small populations of Nagaland and Mizoram are lost by being lumped with the large predominantly Hindu and “animist” population of Assam. Kerala, Nagaland, and Mizoram are highly Christianized and have some of the highest education rates in India.

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<sup>28</sup> An early example of this anti-Christian bias is from British India. In 1816 the Madras Government passed regulation restricting the appointment of Indian Christians to government posts and forbidding them to be employed in the army (Ingham 1956: 15).

<sup>29</sup> I have not adjusted the missionary data to match Indian provinces, states, and agencies in 1925 or Indian states in 1991. Thus, I have only made the association between missions activity and Indian education rates visually, not in a statistically rigorous way.

| Table 1: The Impact of Religion on Student Enrollment at Accredited Schools per 1,000 Population over Five in the Provinces in British India, 1931 |         |
|--|---------|
| % Hindu  | 20.4    |
|  | (21.5)  |
| % Muslim   | 6.6     |
|  | (24.0)  |
| % Christian  | 911.0+  |
|  | (463.8) |
| N  | 13      |

OLS regression, constant not shown in table.  
Standard errors in parentheses  
+  $\leq .1$ , two tailed test

Moreover, the coefficient for percent Christian is very large. For each percentage point increase in the Christian population we would expect 911 more students per 1,000 population. Both the large coefficient and the large standard error seem to be because of the small percentage Christian in most Indian provinces. This large coefficient is consistent with historical evidence that missionaries provided much of the education in India. Because missionaries educated non-Christians, as well as Christians, we would expect both the percentage Christian and education rates to be higher in areas with more missionary activity.

The association of Christianity and education is also evident at the individual level. The Indian censuses of 1881, 1891, 1901, 1911, and 1921 provide data on the religion of individuals and in every year Christians are at least twice as likely as members of other religions to be enrolled in school and between 1901 and 1921 are four to five times as likely to be literate (see Oddie 1968: 47; 1996a: 158-9). These data also show that Indian Christians were also far more likely to attend and graduate from college (Oddie 1968: 47).

These differences in enrollment and literacy rates seem to have had a lasting impact. In Table 2 we see that even in 1991, the percent Christian influences the literacy rates of Indian

states – particularly women’s literacy rates. This is remarkable given that most converts to Christianity come from the most oppressed groups: *Dalits* (i.e., “untouchables”) and “tribals.” These groups are the least likely to have the resources to afford education on their own. Moreover, when we look on the map, the highest literacy rates are in states like Kerala – which is on the southwestern coast – and Nagaland and Mizoram – which are in the mountainous jungles above Bangladesh and Burma. They are all far from both the centers of Indian trade and national power, and thus unlikely to get a disproportionate amount of India’s national education budget.<sup>30</sup>

| Table 2: Impact of Percent Christian on the Literacy, Women's Literacy, and Infant Mortality of the States of India, 1991 |            |                  |                  |
|---|------------|------------------|------------------|
|   | % Literate | % Women Literate | Infant Mortality |
| % Christian   | .19+       | .29*             | -.71***          |
|   | (.095)     | (.11)            | (.18)            |
| R Squared   | 0.16       | 0.24             | 0.41             |
| N   | 23         | 23               | 23               |

OLS regression; standard errors in parentheses; constant not shown in table.

+  $p \leq .10$ , \*  $p \leq .05$ , \*\*  $p \leq .01$ , \*\*\*  $p \leq .001$ ; two-tailed test

Scholars often attribute the high education rates in Kerala to their post-colonial election of a Marxist government (e.g., see Heller 1996). However, this does not explain the high education rates in Kerala during the colonial period. In 1941 over 55% of people in what is now Kerala were literate – higher than any other region of India, four times higher than the Indian average, and comparable to European countries like Portugal. Moreover, the Christians in Kerala were more educated than all other major religious groups (Kooiman

<sup>30</sup> Since independence the government has suppressed information on the correlation between religious traditions and various outcomes – such as education. Thus, we cannot repeat the analysis of the individual-level correlation between religion and education with post-colonial census data.

1996: 153, 157-58). Nor does Marxism explain the high education rates in Nagaland and Mizoram – which have not had Marxist governments. Moreover, low-caste Keralites were able to organize and elect a Marxist government partially because of the broad education and diverse organizational civil society that developed in Kerala during the colonial period (Heller 1996). I suspect this diverse civil society developed because Christian missionaries were disproportionately active there (e.g., Kooiman 1996). However, we will discuss missions and the rise of organizational civil society later in this dissertation.

The regional association of missions and education is also corroborated in non-British colonies. For example, within Japan the private educational sector is larger in areas that had more missionary influence (James 1989c). This result remains statistically significant even with numerous statistical controls.

Thus, in a diverse set of colonized and non-colonized societies we find a consistent association between sub-national regions with high missionary activity and sub-national regions with more education. This consistent finding at the sub-national level undermines the conjecture that some unmeasured aspect of government policy caused the cross-national differences in education rates between countries with different levels of missionary activity. If some unmeasured factor caused both the differing levels of missionary activity between societies and the differing levels of colonial and post-colonial education between societies, this factor should also vary between the regions of Kenya, Ghana, Nigeria, India and Japan with more missionary activity and more education.<sup>31</sup>

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<sup>31</sup> My historical analysis suggests this pattern holds in many other societies, but I currently do not have the statistical data to demonstrate this.

The high education rates in Nagaland and Mizoram undermine the argument that ease of access, depth of colonial influence, pre-colonial economic development, or pre-colonial literacy rates are the primary causal factors. Both areas had little contact with British colonial institutions, are far from the coast and any major trade route, were populated primarily by hunter-gather tribes, and had no written language prior to contact with missionaries. Yet, both currently have among the highest literacy rates in India.

*Statistical Tests of Mission's Impact:*

The historical and sub-national evidence I discussed above suggests that missions were the crucial factor in expanding British education. To check the strength and generalizability of my historical analysis, I ran a series of regressions with cross-national data.

In Table 3, I used data from Benavot and Riddle (1988) to analyze primary school enrollment per capita for the population between 5-14 in a sample of nonwestern countries between 1870 and 1940. Because the British acquired new colonies during this period, I adjusted the variable for British colonialism to include only countries that were colonized by the British at the time of the enrollment data.<sup>32</sup>

To check the robustness of my results, I redid the analysis using the log years of British colonization instead of a dummy variable. The results were the same: the positive impact of British colonization always disappeared when I controlled for the number of Protestant missionaries. In fact in some years, societies the British colonized longer had significantly *lower* enrollment rates per capita after I control for missionaries.

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<sup>32</sup> After World War I the British acquired a number of former German and Ottoman colonies but did not have much time to expand enrollments before 1920, this wipes out the positive impact of being a British colony in 1920 only. See *Appendix Three* for a description of the missionary data.

|  | 1870-75 |          | 1880   |          | 1890   |          | 1900     |          |
|--|---------|----------|--------|----------|--------|----------|----------|----------|
| British Colony                                     | 4.3     | -9.24*   | 8.034+ | -3.24    | 10.00* | 3.48     | 15.09*** | 8.14*    |
|  | (4.4)   | (3.74)   | (4.29) | (4.48)   | (3.89) | (3.27)   | (4.42)   | (3.99)   |
| Missionaries per cap<br>1925 (coefficient / 1,000) |         | 93.42*** | -      | 91.45*** | -      | 49.10*** | -        | 59.19*** |
|  |         | (17.62)  | -      | (23.4)   | -      | (8.95)   | -        | (11.98)  |
| N  | 18      | 18       | 26     | 26       | 47     | 47       | 60       | 60       |
| F  | 0.952   | 15.291   | 3.5    | 10.39    | 6.62   | 20.43    | 11.68    | 20.37    |
| R-Squared  | 0.053   | 0.657    | 0.123  | 0.464    | 0.126  | 0.476    | 0.407    | 0.413    |

|  | 1910    |          | 1920   |         | 1930   |          | 1935-40 |          |
|--|---------|----------|--------|---------|--------|----------|---------|----------|
| British Colony                                     | 13.76** | 7.67+    | 4.85   | 2.41    | 9.19*  | 4.02     | 9.88*   | 4.68     |
|  | (4.61)  | (4.26)   | (4.04) | (3.88)  | (4.37) | (3.92)   | (4.83)  | (4.50)   |
| Missionaries per cap<br>1925 (coefficient / 1,000) | -       | 59.42*** | -      | 49.49** | -      | 67.24*** | -       | 65.76*** |
|  | -       | (12.94)  | -      | (15.23) | -      | (12.73)  | -       | (14.67)  |
| N  | 70      | 70       | 76     | 76      | 83     | 83       | 83      | 83       |
| F  | 8.93    | 16.31    | 1.44   | 6.09    | 4.42   | 16.89    | 4.19    | 12.64    |
| R-Squared  | 0.115   | 0.324    | 0.019  | 0.141   | 0.051  | 0.294    | 0.049   | 0.238    |

OLS regression; constant not shown in table; standard errors in parentheses.

+  $\leq .1$ , \*  $\leq .05$ , \*\*  $\leq .01$ , \*\*\*  $\leq .001$ , two-tailed test

To quantify the long-term impact of missions and colonialism on education I ran another series of regressions using primary and secondary school enrollment data from 1965 to 1985 (Barro and Lee 1994). In these regressions I used the log years the society was colonized by the British because the countries in the sample are no longer under British administration – theoretically the cumulative impact of British colonialism should matter more than whether a society was colonized or not.

In Table 4, we see that the number of Protestant missionaries per capita in 1925 has a strong and consistent positive association with both primary and secondary enrollments rates from 1960 through 1985. Previous research consistently suggests that former British colonies have more education per capita (Kamens 1988; Brown 2000; Grier 1999; Hanson 1989; Clarke 1997: 121), but once we control for Protestant missionary activity they do not. In fact, once we controlled for missionaries per capita, the impact of British colonialism on elementary education becomes significantly negative. In other words, if we held the number of Protestant missionaries constant between colonizers, British colonies would have less primary education per capita than other colonies. To check the robustness of these results, I ran them all again twice: once using a dummy variable for whether the British were the primary colonizer and once using a dummy variable for whether the British were the last colonizer.<sup>33</sup>

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<sup>33</sup> I defined “primary colonizer” as a weighted combination of years of colonization and recentness of colonization. If the most recent colonizer colonized an area for at least 65 years, I coded it as the “primary” colonizer. If the most recent colonizer colonized an area for less than 65 years *and* a previous colonizer had colonized the area for more than twice as long as the last colonizer, then I coded the previous colonizer as the “primary colonizer.” If there was more than one colonizer, but no colonizer controlled the “country” for more than twice as long as any other colonizer, I counted the last colonizer as the “primary colonizer.” Thus, for example, many Middle Eastern societies were “last” colonized by the British and French, but “primarily” colonized by the Ottomans.



Table 4: The Impact of British Colonialism and Protestant Missionaries on Primary and Secondary School Enrollment Rates in the Nonwestern World: 1960-85.

|   | Primary Education Enrollment Rate |        |        |          |         |        | Secondary Education Enrollment Rate |         |         |         |         |        |
|---|-----------------------------------|--------|--------|----------|---------|--------|-------------------------------------|---------|---------|---------|---------|--------|
|   | 1960                              | 1965   | 1970   | 1975     | 1980    | 1985   | 1960                                | 1965    | 1970    | 1975    | 1980    | 1985   |
| Log Years British Colony                | -.50*                             | -.46*  | -.42*  | -.43*    | -.34+   | -.21   | -.08                                | -.08    | -.05    | -.04    | -.08    | -.05   |
|   | (.19)                             | (.19)  | (.20)  | (.18)    | (.17)   | (.17)  | (.06)                               | (.07)   | (.08)   | (.08)   | (.08)   | (.10)  |
| Missionaries per cap 1925 (Ceof./1,000) | 115.8***                          | 91.3** | 89.0** | 102.1*** | 98.1*** | 86.3** | 26.3**                              | 40.5*** | 42.0*** | 35.1*** | 34.5*** | 39.5*  |
|   | (29.9)                            | (29.1) | (30.4) | (28.2)   | (27.0)  | (27.0) | (9.2)                               | (8.9)   | (10.9)  | (10.2)  | (10.3)  | (15.1) |
| N                                       | 69                                | 69     | 71     | 78       | 77      | 77     | 81                                  | 78      | 80      | 81      | 82      | 78     |
| F                                       | 7.84                              | 5.46   | 4.64   | 6.91     | 6.64    | 5.15   | 4.13                                | 10.41   | 7.73    | 6.12    | 5.67    | 3.70   |
| R-Squared                               | .190                              | .140   | .188   | .154     | .150    | .121   | .095                                | .215    | .165    | .134    | .124    | .089   |

OLS regression; constant not shown in table; standard errors in parentheses.

+  $\leq .1$ , \*  $\leq .05$ , \*\*  $\leq .01$ , \*\*\*  $\leq .001$ , two-tailed test

In both cases the results were virtually identical. Protestant missionaries had a universally positive and significant impact on enrollment rates; British colonialism was either insignificant or had a significantly negative impact on enrollment rates once I controlled for the number of Protestant missionaries.

To test if my results were driven by outliers or influential cases, I repeated all the analyses in Tables 3 and 4 for five different regions of the world: Latin America, the Middle East and North Africa, Asia (minus the Middle East), Sub-Saharan Africa, and Islands. This procedure also tested whether my coefficients picked up some unmeasured regional variations in education. In all these regions and for every year tested, in spite of small Ns, Protestant missionaries per capita in 1925 almost universally had a positive coefficient and often a statistically significant positive coefficient. Although sometimes the coefficients were statistically insignificant, they were never significantly negative.<sup>34</sup> Insignificant coefficients seem to have been caused by a low N and collinearity with British colonialism – the F statistic for the model was sometimes significant, but the coefficients for missionaries and British colonialism were both insignificant. This suggests my results are not caused by outliers or unmeasured variation in regional education rates. If outliers are important, they are amazingly consistent over time and between regions.

However, some might argue that missionaries primarily went to areas with higher economic development and this caused the association between missions and education. To avoid this criticism, I reran each analysis controlling for GDP (see Table 5). Ideally, I would control for GDP at the time of the missionary activity – rather than forty to eighty years later. However, I have not found widespread GDP data prior to the 1950s. Therefore, I chose to

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<sup>34</sup> From the 108 regressions this involved I saved all regressions in which *any* variable was statistically significant. I rechecked all of these runs and the coefficient for total missionaries was always positive.

control for GDP in the same year as the education data (e.g., 1965 GDP predicting 1965 education). Statistical evidence suggests that colonial education influenced later economic growth (e.g., Grier 1999). Thus, the coefficient for GDP will absorb any impact British and missionary education had on later economic growth. As a result, we should view these regressions as a conservative test of the impact of earlier missionary activity on later education rates.

Controlling for GDP did not remove the impact of missions in 1925 on elementary education. In fact, when I added a variable for “percent evangelized by 1900,”<sup>35</sup> these two historic missions variables often removed the impact of modern GDP on primary education (see Table 5). If we compare the first and second column for each data year in Table 5, we see both the coefficient size and the significance level for GDP plummet when we control for historic missionary activity. Moreover, the R-squared always more than doubles.

“Evangelism by 1900” is by far the most consistent predictor of modern elementary education – its coefficient is positive and significant at the  $p \leq .001$  level in every year. “Missionaries in 1925” is significant in every year when we do not control for “evangelism by 1900.” However, these two missions variables are highly correlated and when I control for both, “missionaries in 1925” generally becomes insignificant or marginally significant. Still, in the final model “missionaries in 1925” is significant once, and marginally significant three times. Thus, it is a more consistent predictor of modern elementary education than modern GDP – even with a related variable in the analysis.

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<sup>35</sup> This variable is an estimate of the percentage of the population that had been exposed to Christian witness by 1900. It comes from the World Christian Encyclopedia (Barrett, Kurian, and Johnson 2001).

**Table 5: OLS Regression Predicting Post-Colonial Elementary Education Enrollment in Nonwestern Societies: 1960-85**

|                                       | 1960   |         | 1965   |         | 1970  |         | 1975   |         | 1980  |         | 1985  |         |
|---------------------------------------|--------|---------|--------|---------|-------|---------|--------|---------|-------|---------|-------|---------|
| Ln Years British                      | .06    | .13     | -.05   | .10     | .02   | .16     | -.00   | .10     | -.02  | .22     | .04   | .19     |
|                                       | (.17)  | (.18)   | (.17)  | (.19)   | (.17) | (.20)   | (.16)  | (.17)   | (.15) | (.14)   | (.16) | (.16)   |
| Missionaries/cap<br>1925 (coef./1000) |        | 54.60*  |        | 41.13   |       | 30.12   |        | 45.82+  |       | 30.62+  |       | 46.52+  |
|                                       |        | (25.62) |        | (26.40) |       | (28.72) |        | (25.22) |       | (17.80) |       | (23.66) |
| % Evangelized by<br>1900              |        | .30***  |        | .31***  |       | .30***  |        | .31***  |       | .31***  |       | .30***  |
|                                       |        | (.06)   |        | (.06)   |       | (.06)   |        | (.05)   |       | (.05)   |       | (.05)   |
| Current GDP<br>(coefficient x 10)     | .09*** | .04*    | .07*** | .03     | .05** | .02     | .05*** | .02+    | .04** | .01+    | .01   | .00     |
|                                       | (.02)  | (.02)   | (.02)  | (.02)   | (.01) | (.01)   | (.01)  | (.01)   | (.01) | (.01)   | (.01) | (.01)   |
| R-Squared                             | .226   | .531    | .189   | .472    | .153  | .421    | .202   | .501    | .167  | .507    | .018  | .433    |
| N                                     | 66     | 66      | 66     | 66      | 69    | 69      | 75     | 75      | 76    | 76      | 77    | 77      |

Constant not shown in table; Standard errors in parentheses;  
+ ≤ .1, \* ≤ .05, \*\* ≤ .01, \*\*\* ≤ .001, two-tailed test

Controlling for GDP did remove the direct impact of missionaries in 1925 on *secondary* education in 1960, 1970 and 1975 – although not in 1965, 1980 or 1985. This does not mean that missionary activity in 1925 did not influence secondary education rates in these three years – the impact of early missionary work may be mediated through economic growth. Moreover, the number of Protestant missionaries in 1925 is a weak measure of the cumulative impact of mission on education.

If I added a variable for the number of students per capita at missionary secondary schools in 1925, missionary education has a strong and statistically significant impact on secondary education in all future years. Controlling for GDP has little influence on this coefficient. In fact, in every year tested, the coefficient for missionary secondary education is significant at or near the  $p \leq .001$  level even after controls (see Table 6).

|   | 1960    | 1965    | 1970    | 1975    | 1980    | 1985     |
|---|---------|---------|---------|---------|---------|----------|
| Log Years British                           | -.08    | -.07    | .01     | -.01    | -.02    | -.14+    |
|   | (.06)   | (.07)   | (.08)   | (.08)   | (.06)   | (.08)    |
| Missionaries per cap<br>1925 (coef./1000)   | 17.67+  | 27.09*  | 16.36   | 12.30   | 2.13    | 27.12*   |
|   | (8.91)  | (10.86) | (12.73) | (11.50) | (9.12)  | (11.57)  |
| Sec. Students per cap<br>1925 (coef./1,000) | 6.84*** | 6.98**  | 8.01**  | 9.35*** | 8.02*** | 10.08*** |
|   | (1.84)  | (2.24)  | (2.60)  | (2.37)  | (1.58)  | (2.50)   |
| Current GDP<br>(coefficient x 10)           | .03***  | .03***  | .03***  | .03***  | .03***  | .02***   |
|   | (.01)   | (.01)   | (.01)   | (.00)   | (.00)   | (.00)    |
| R-Squared                                   | .376    | .378    | .429    | .504    | .583    | .515     |
| N   | 76      | 76      | 77      | 78      | 78      | 80       |

Constant not shown in table; Standard errors in parentheses.  
 $+ \leq .1$ ,  $* \leq .05$ ,  $** \leq .01$ ,  $*** \leq .001$ , two-tailed test

Moreover, the impact of missionary education shows no signs of declining with time – presumably because teachers trained in missionary schools helped train future teachers. As we move from 1960 through 1985 in Table 6, the coefficient for “Secondary Students per capita in missionary schools in 1925” actually increases. The R-squared also increases over time. In the final model, the coefficient for “missionaries in 1925” remains positive in every year and is statistically significant or marginally significant in 1960, 1965, and 1985. Despite the emphasis on “British” education in previous literature, I found no evidence of a positive influence of British colonialism on secondary education once missionary activity is controlled. In fact in 1985, British colonialism is associated with less secondary education per capita and the coefficient is marginally statistically significant.

Cumulatively, this statistical evidence suggests that missionary education had a profound and long-lasting impact on educational rates throughout the world. This impact seems to be more important than the educational policy of particular colonizers and often even than later levels of economic development. Statistical analyses of comparative education that do not control for historic missionary activity will have severely biased coefficients.

*How Missionary Education may have Influenced Post-Colonial Democracy:*

Earlier and more pervasive formal education in areas with more missionary activity fostered democracy both directly and indirectly. Statistical analyses suggest a direct positive association between formal education and both the level of democracy and the stability of democratic transitions even with other factors controlled (Bollen 1979; Crenshaw 1995; Gasiorowski and Power 1998; Kamens 1988; Barro 1999). Barro (1999) finds democracy is

also associated with greater equality in education between men and women. Missionaries were especially prominent in promoting female education (e.g., Taylor 1984; C. Mackenzie 1993). Missionaries were generally the first, and often the only group to educate women during the colonial period.

In addition, education may foster democracy indirectly by facilitating economic growth, expanding the size of the elite and middle class, increasing exposure to democratic ideals, improving state capacity, and easing stable decolonization. I will look at each in turn.

Statistical research that suggests that former British colonies are more democratic generally has some measure of education as a control variable – in effect entering an intervening variable in the analysis. However, these articles use only one measure of education (e.g., literacy or primary education rates), only measure the impact of education from one point in time, and use only postcolonial education rates. This causes them to underestimate the cumulative impact of education on societies. I suspect that *broad education over a long period of time* helps economic development, helps expand the size of the middle class, expands the size and diversity of elites, and so on. These processes take time to develop. Over a short period of time, education may actually hamper economic growth by taking workers out of the economy. Rapidly expanding education may also create political instability by creating a larger pool of graduates than the economy can absorb. Because British colonies had earlier and more pervasive education than other European colonies (and the authors do not measure this), the impact of this early education becomes part of other correlated coefficients, including the coefficient for being a “British colony.”

*1) Economic Development:* Recent economic theory suggests that education increases human capital,<sup>36</sup> which spurs economic growth (Lucas 1988; Romer 1989; Barro 1991; Brown 2000; World Bank 1991; Schultz 1993). However, the type of education is also important – not just the amount of education. Historical economists like Timur Kuran suggest that education that focuses on critical thinking and science – versus rote memorization of ancient texts – is especially crucial for economic growth (1997).

A number of statistical studies suggest that differences in education explain much of the later disparity in economic growth between countries (Denison 1985; Schultz 1989; Barro 1991; Brown 2000; Grier 1999; also see Sokoloff and Engerman 2000; Coatsworth 1999). Similarly, since decolonization per capita GDP has grown faster in former British colonies than in former French colonies, possibly as a result of British colonies greater education base (Brown 2000; Grier 1999).

Missionaries were also directly involved in teaching indigenous peoples the skills they needed to make the transition to a capitalist economy (e.g., Cox 1997; Comaroff and Comaroff 1997: 119-219; Stanley 1990: 70-3, 123; Taylor 1984; Kark 1995; 1999; Swanson 1982; Isichei 1995). They introduced new crops (such as Cocoa in West Africa), taught people new farming techniques and industrial skills (such as masonry and carpentry), taught people to read and understand accounting – which enabled them to read the ledgers of traders and avoid being cheated. They tried to introduce the value of cash and the concepts of private property rights and contracts. In places like Botswana, they even introduced a currency prior to widespread contact with traders or taxes in the desire to prepare indigenous people for the eventual encounter (Comaroff and Comaroff 1997: 59, 191-2, 375).

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<sup>36</sup> Human capital is the skills and knowledge workers bring to bear on production.



Missionaries felt that learning the concept of private property and contracts was the best way to keep settlers from taking indigenous land. Missionaries also felt establishing a market economy would undermine the slave trade by giving African chiefs another way to procure foreign goods, and would allow indigenous people to keep more of the proceeds from trade (Comaroff and Comaroff 1997: 119-219, 375; Stanley 1990: 70-3; Cox 1997). Perhaps because monopoly companies kept restricting missionaries, 19<sup>th</sup> century Nonconformist missionaries and their supporters also consistently pressured for free trade in the colonies and cooperated politically with *laissez faire* political economists (Levy and Peart 2002; Cox 1997; Russell 1993). Free trade forced colonial businesspeople to compete to buy local products and presumably gave indigenous people a higher rate of return. I assume this education and transfer of resources and skills helped foster economic development.

Economic development is consistently associated with both higher levels of democracy, and more stable democratic transitions, even with current education rate controlled (Bollen 1979; Burkhart and Lewis-Beck 1994; Londregan and Poole 1996; Gasiorowski and Power 1998; Lipset 1994).

2) *Expanding the Size of the Elite and the Middle Class*: Finding good world-wide quantitative data on class structure is difficult. However, the theoretical and historical work on democratization suggests that a diverse elite and a large middle class are important factors in promotion democracy and that broad education is important in developing these factors (see, e.g., Lipset 1994; Schumpeter 1950; Moore 1966; Berger 1986; 1992; Acemoglu and Robinson 2001). Existing quantitative literature is consistent with this theoretical and historical work (e.g., Easterly 2001).

When the same people control education, economic resources, political positions, and traditional authority, these people do not need to integrate many others into political compromises and have an easier time sustaining dictatorship or oligarchy. Mass education makes this type of concentration of resources more difficult. When colonial governments trained a small elite (usually the children of existing elites); that training accentuated distinctions between this elite and ordinary people. Missionary mass education often had the opposite effect. In many colonial societies, missionaries provided virtually the only formal education for exploited classes, such as non-whites in South African and Jamaica and members of low-castes in India (e.g., Isichei 1995: 302; Rooke 1978-79; Blouet 1990; Oddie 1996a; Ingham 1956). Even when other options technically existed, religiously subsidized education increased the educational options available to poor people (Levy 1989). Thus, mission education fostered social mobility among non-elites (e.g., Oddie 1996a) and presumably expanded the pool of people with resources to pressure older elites.

When more people have resources to pressure the state, political elites need to integrate more of them into any ruling coalition or the coalition will be unstable. Larger, more diverse ruling coalitions may foster more rule based decision-making strategies, facilitate more democratic political solutions to political crises, and forestall one-party rule.<sup>37</sup> For example in Africa, French colonies had a smaller elite and less widespread education than British colonies. Perhaps as a result, post-colonial elites in French African colonies were able to consolidate one party rule almost immediately after independence. This process took longer in former British African colonies (R. Collier 1982: 72-3, 100-101). Poor quality education,

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<sup>37</sup> Crenshaw (1995) and Dahl and Tufté (1973: 39) discuss how diverse elites and complex social organization fosters democracy.

brief unsustained periods of education, and concurrent education seem unlikely to alter the size of the elite, foster economic development or change class structure.

3) *Increased Exposure to Democratic and Egalitarian Ideals*: The ideology of elites influences whether they seek democratic solutions to political crises (Bermeo 1992; Hadenius and Ugglå 1996). This ideology may have been influenced by the content of colonial education. Colonial states had little incentive to teach about democracy, equality, or human rights in school. In fact, the French restricted the number of students who could go to France for fear they would learn democratic ideals. For similar reasons, the French blocked access to schools where they could not control the educational content (Kelly 2000b; 2000d).

Missionaries had other interests: they wanted to convert people. One way Protestant missionaries tried to do this was by associating Protestantism with science, economic growth, education, and democracy (Fairbank 1974; 1985; Dunch 2001; Bohr 1972; 2000, Walls 2002c; Bennett 1983; Comaroff and Comaroff 1997; Hutchison 1987; McLoughlin 1990; Tsou 1996). Some missionaries emphasized democracy and equality in their teaching, in books they wrote and translated for indigenous use, in arguments they made in publications, and occasionally even in organizing student protests or directly encouraging their converts to participate in nationalist activities (e.g., Fairbank 1974; 1985; Bennett 1983; Drummond 1971: 152-55; Tinker 1979; King 1922; Farmaian 1992: 106; Frykenberg 1999; Oddie 1968; Langworthy 1996; Booth 1897; Shepperson and Price 1958; Forster 2003). For example, Robert Frykenberg writes: “Indeed, at every stage during the struggle, anti-imperial nationalism in India received substantial and sympathetic support from missionaries (from Allen Hume and Verrier Elwin to Charles F. Andrews, Edward Thompson and Amy

Carmichael, many of whom became friends of Gandhi).” (1999: 183-4; also see van der Veer 2001: 36; Robert 2002a; C. Mackenzie 1993; Oddie 1968; Fleming 1922).<sup>38</sup>

This does *not* mean missionaries usually taught about democracy or consistently fostered anti-colonial resistance. Most did not want to spur colonial restrictions by associating themselves with revolutionaries (Greenlee and Johnston 1999; Stanley 1990: 86-88; Kerry 1891) and many tried to portray themselves as fostering loyal subjects (e.g. C. Mackenzie 1993; J. Tucker 1933b; Moreira 1935). My argument is merely that state controlled education often focuses on technical skills (rather than political and social thought) and states often use education to indoctrinate students in line with state interests (e.g., Lott 1999; Kelly 2000c; Sindhuprama 1988). Compared to state-sponsored education, missionaries had more incentive to teach about human rights, equality, and democratic ideals. Their primary goal was to convert people, not maintaining the political status quo (C. Mackenzie 1993). As such, their loyalties were always divided – they needed to impress those they wished to convert as well as mollify the colonial elites who could restrict them.

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<sup>38</sup> For example, a February 1888 article in *The Harvest Field* - a magazine for India missionaries and their supporters – reads:

The [Indian] National Congress this year has surpassed its successful predecessors ... Some of the newspapers still sneer at the movement, but their sneers will shortly recoil on them. That feature of the Congress to which we would here call attention is the presence and influence of Native Christians... No social topics were discussed, but we are glad to know that arrangement have been made for a national Social Congress to be held henceforth ... It is impossible, we believe, to exaggerate the forces that are latent in this Congress-to-be. ... [The organization of Indian Christians meeting in conjunction with the Indian National Congress] should receive distinct encouragement from missionaries. To treat [this Christian branch of the movement] with indifference or jealousy will be fatal – not to it, for we believe it will live and grow – but to that helpful influence which missionaries ought to exercise over it. It is inevitable that in such an assembly there will be frank and frequent criticism of the policy and methods of missionary societies; and some of the criticism will probably be foolish and even irritating. But we cannot afford not to listen to it, and any attempt to frown it down would be the highest impolicy [sic.]. We have been criticized by outsiders often, ... [Indians] time [to criticize us] is coming. It is well both for themselves and for us that they should do it, and we shall lose nothing if we respond to it honestly and sympathetically. (*Harvest Field* 1888: 278-79).

Settlers and colonial officials often accused missionaries of fostering rebellion by teaching equality (Miller and Stanczak 2000; Oddie 1978; McLoughlin 1990; Russell 1993; Greenlee and Johnston 1999; King 1922; Sundkler and Steed 2000: 274; Cruz e Silva 2001; Stanley 1990: 153; Semmel 1963: 33-44, 53; Blouet 1990; Ingleby 2000: 325-27; Langworthy 1996; Shepperson and Price 1958). To prevent restrictions, missionaries often denied these charges. However, indigenous people often picked up the language of civil and constitutional rights from missionaries and used this language to demand concessions from the colonial state (e.g., Comaroff & Comaroff 1997: 365-404; Langworthy 1996).

The indirect influence of mission on anti-colonial resistance is clear from the prevalence of missionary trained leaders in anti-colonial movements. The leaders of slave uprisings seem to have been disproportionately mission educated (e.g., Blouet 1990; Rooke 1978-79; also see Semmel 1963; Russell 1993). Moreover, early nationalist and reform leaders in Africa, the Middle East, India, China, Japan, Korea, Indonesia, and probably elsewhere, were disproportionately missionary-trained and influenced (Robert 2002a: Stanley 1990: 133-55; Sundkler and Steed 2000: 654; Comaroff and Comaroff: 1997: 401, 412; Cruz e Silva 2001; Kaplan 1995; Antonius 1961; Zavos 2000; Oddie 1968; 1978; Ingham 1956; Bohr 2000; Wong 1999; Dunch 2001; Webster 1923; Fairbank 1974; 1985; Shen and Zhu 1998; Drummond 1971: 152-55; Robert 2000: 51; D. Clark 1986: 8-10; Grayson 2002: 160-62; Steinberg 1987: 296; Langworthy 1996; Shepperson and Price 1958; Forster 2003).

For example, in Africa “Christian education had a near monopoly in the development of the new force of nationalism” (Sundkler and Steed 2000: 654). Most early African nationalist leaders, as well as the backbone of their support, came from mission schools (ibid. Comaroff and Comaroff 1997: 401; Isichei 1995: 339; Robert 2000). A similar pattern holds

in Korea during the Japanese occupation. For example, in 1911 the Japanese arrested 124 students for conspiracy against the Japanese governor-general, at least 98 of them were Christians (i.e., 79%). Similarly, in 1919 thirty three Koreans signed the Korean Declaration of Independence, fifteen were Christians (i.e., 45.5%). At the time, Christians made up no more than one percent of the population (Kang 1997; Robert 2000; Grayson 2002: 160-62).

The preponderance of missionary trained nationalist and reform leaders over such a diverse spectrum of countries is probably not a generic effect of education. In the Middle East, India, China, and Korea, non-missionary educational systems existed, but nationalists were still disproportionately missionary trained and primarily Protestant missionary trained. Similarly, in Portuguese colonies state-subsidized Catholic education predominated, but nationalist leaders were disproportionately trained by Protestant missionaries (Stanley 1990: 20; Cruz e Silva 2001; Sundkler and Steed 2001: 320-21, 972-73, 985). In Angola – where Protestants made up only a small minority - the leaders of all three political parties at independence were the children of Protestant ministers or catechists (Sundkler and Steed 2001: 320-21, 972-73).

The twenty-some sources listed above consistently mention the missionary and Biblical emphasis on the equality of all people before God as being one factor in the rise of anti-colonial movements. Nationalists used this teaching to criticize both “Christian” nations, and at times, missionaries (e.g., Dunch 2001: 57, 60, 95). A number of these sources also mention missionaries explicitly teaching about democracy and “liberal modernism” and direct encouragement of nationalist activities (e.g., Comaroff and Comaroff: 1997: 401, 412; Kaplan 1995; Drummond 1971: 152-55; Bennett 1983: 39, 225; Robert 2000; 2002a; Stanley 1990: 138, 153; Ingleby 2000: 327; Oddie 1968; Forster 2003; Shepperson and Price 1958;

Langworthy 1996), missionaries emphasis on open discussion and critical thinking in their schools (e.g., Kaplan 1995: 37; Kuran 1997; Drummond 1971: 152-55; Shen and Zhu 1998: 156-58), the cross-regional networks and experience of democratic participation people gained at denominational and missionary conferences (e.g., Dunch 2001: 22-24; Stanley 1990: 134), and resentment over missionary paternalism and religious polemics (Stanley 1990; Das 1999; Deol 2000; Chipembere 2002: 19, 186-195).<sup>39</sup>

Some indigenous pastors and teachers at missionary schools also seem to have developed resentment over the higher pay and leadership positions white missionaries received. Their rising material expectations, combined with low pay, and regular exposure to comparative white missionary privilege fostered resentment that sometimes facilitated a more general critique of white rule (e.g., Chipembere 2002: 186-95).

Missionary newspapers and journals also often provided space for intellectuals to discuss reform ideas which sometimes became the seeds for nationalist movements (e.g., Bennett 1983; Dunch 2001; Shen and Zhu 1998: 156; Drummond 1971). Protestant missionary printing was also central to initiating the development of the vernacular press –

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<sup>39</sup> Missionaries varied widely in their sensitivity to other cultures and religions. Some were extremely sensitive and gave nuanced and irenic treatments of other belief systems (e.g., WMC 1910c; Reichelt 1928; Farquhar 1913; Fleming 1925; Oddie 1996b; 1999: 187), others were insulting (e.g., Das 1999: 210; A. Smith 1894). Under prolonged periods of Western colonialism, many colonial subjects became increasingly sensitive to slights (e.g. Oddie 1978: 1; Ingleby 2000: 282-84) and some grew to view even the attempt to convert people as an insult to the dignity of their culture and religious traditions.

However, evaluating the impact of missionary paternalism is difficult, because resentment varied greatly depending on who the colonial government was. As long as the colonizer was Japan, Korean nationalism was friendly to missionaries (Kang 1997; D. Clark 1986; Robert 2000; Grayson 2002: 160-62). Similarly, when the colonizer was the Ottoman Turks, even Arab nationalism was friendly with Protestant missionaries (Kaplan 1995; Antonius 1961). When the colonizer was European, this often was not the case. Perhaps the protection of European colonialism made missionaries less cautious and the humiliation of European colonialism made nationalists more sensitive to criticism and more selective in their appropriation of missionary discourse.

Contemporary nationalist and religious activists also often use historic missionary paternalism to energize movements. For example, contemporary Islamist writers often use writings from particular 19<sup>th</sup> and early 20<sup>th</sup> century missionaries to rile up the faithful (Sharkey 2003). Modern Hindu nationalists use similar tactics (e.g., Frawley 1999). In these contexts the goal is to stir anger rather than sow understanding, thus writers focus on the most offensive passages and do not place the writers in historic context. In fact, many write as if the missionaries they quote were still alive and writing contemporarily (Sharkey 2003: 49).

which indigenous leaders used to mobilize nationalist, communal, and religious sentiments (e.g., Deol 2000: 19-21, 85-7).

The pattern of nationalists drawing on missionary teaching is also clear in the type of reform programs these leaders initiated before and after independence, many of which closely followed earlier missionary initiative – whether these leaders formally recognized this or not (e.g., Fairbank 1974: 1985; Stanley 1990: 133-55; Robert 2000; Dunch 2001; Bennett 1983; Bohr 1972; 2000; Walls 2002c; Shen and Zhu 1998; Ingham 1956; Hutchison 1987: 1; Deol 2000: 23, 68-71; Oddie 1978: 7, 52; Zavos 2000: 47; Das 1999: 96-7).

This does not mean that these early nationalist leaders were consistently democratic – they were not. It also does not mean they did not chastise missionaries along with colonizers and settlers– they did, especially latter generations of them (e.g., Stanley 1990: 133-55; C. Mackenzie 1993; Ingleby 2000: 282-84; Chipembere 2002). But, the strong and consistent association between nationalist leaders and missionary education suggests that future scholars need to explore the political content of missionary education relative to other forms of colonial and nonwestern education and the impact it may have had on the ideology and political programs of early nationalists.

It also implies that scholars need to make more nuance analyses of the relationship between education and democracy. Current statistical analyses of democracy often include a variable for education, but do not control for whether the education is state or privately sponsored. Especially in non-democratic societies, private educational institutions may shape the content and style of education in ways that influences the impact of education on democracy. In non-democratic societies, state controlled education may not have the same effect. For example, the non-democratic education content in communist schools may help



explain why many post-communist societies are highly educated but have had difficulty transitioning to democracy.

4) *Increasing State Capacity and the Stability of Decolonization*: Some scholars argue that former British colonies are more democratic, partially because the British hired more indigenous people into the colonial government and devolved power more gradually (e.g., Tony Smith 1978). Over time, they gained skills running these Western style bureaucratic and legal organizations. When colonial governments left, they often set up democratic institutions to replace them. In British colonies, these government institutions sometimes continued to function, partially because indigenous people had already gained experience working in the courts and bureaucracies. This fostered postcolonial stability (Tony Smith 1978; Lipset 1994; Bollen 1979).<sup>40</sup>

I argue that one reason the British hired more indigenous people into the colonial government is because more indigenous people were educated in British colonies than in other European colonies. Missionary initiated education created a cheap labor force; thus it was cheaper for the colonial government to hire local people than bring educated people from Europe. Missionary education also made colonial leaders and business people worry about educated elites they could not control. When colonizers could restrict missionary education (as in French colonies), they often limited education to those they could hire into the colonial government (Kelly 2000b; 2000d; Furley and Watson 1978: 192-3). However, the British colonial government could not restrict missionary education in the same way. Thus, they needed to deal with a larger group of potentially revolutionary educated elites. One way that they could co-opt educated elites was to make the elites financially dependent on the state by

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<sup>40</sup> See Dahl 1971: 33-47 for a theoretical discussion of this process.

hiring them into the colonial government. This had the unintended consequence of preparing societies for independence.

Conclusion:

Previous research suggests that British colonies had higher education levels during the colonial period and continue to have higher education levels (e.g., Brown 2000; Grier 1999; Hanson 1989; Kamens 1988). However, this chapter demonstrates that once we control for missionary activity, any positive association between British colonialism and education disappears. Missionaries were the major sponsors of colonial education, not the British government. Moreover, early missionary education continues to shape post-colonial societies. For elementary education, historic missionary activity generally removes the impact of modern GDP and other factors traditionally associated with fostering education. For secondary education, missionary activity functions along with GDP as a strong and consistent predictor.

This early mission-sponsored education may have fostered democracy directly and indirectly. Quantitative research suggests a direct, positive association between education and democracy. Extended periods of education prior to decolonization may also have fostered economic growth, expanded the size of the elite and middle class, increased exposure to democratic ideals, and increased the incentive for colonial governments to hire indigenous people. These factors may also contribute to post-colonial democracy. In the next chapter, I focus on a different way missions may have fostered post-colonial democracy – by limiting colonial abuses and shaping how colonizers transferred power to indigenous leaders.

## CHAPTER 4

### NON-STATE MISSIONARIES AND THE MODERATION OF COLONIAL ABUSES

In this chapter I discuss one of the consequences of the greater independence of missionaries from state control in British colonies: the moderation of colonial abuses. Evangelical and Nonconformist Protestants mobilized political pressure to remove regulation of religious groups. Because they had more political power in Great Britain than elsewhere in Europe, they were able to remove religious regulation in Great Britain more effectively than elsewhere in Europe. Moreover, British missions developed as independent voluntary organizations. Thus, unlike in much of the rest of Europe, the state did not control their funds or help choose missionary leaders. This made it easier for both Catholic and Protestant missionaries to criticize colonial policy when it went against their interests. As a result, British colonial domination was more fractured.

The colonial state had less power to silence missionaries or force religious groups to support its interests. The government had to compete with missionaries to determine how its actions in the colonies were portrayed in the press. The government had to pay attention to a significant voting block that knew something about what happened in the colonies, cared about it, and sometimes voted accordingly. This altered the calculations of colonial officials and business elites. They had to be able to justify their actions to a broader audience, an audience not primarily concerned with financial return on investment.

Colonized people had little power in the colonizing state, and colonial officials, business people, and settlers had little incentive to expose their own abuses. As a result, missionaries were often the main source of information about these abuses. When abuses hampered missionary interests, missionaries could unleash a powerful and persistent lobby to fight them. This missionary lobby helped force the early abolition of slavery and the early abolition and moderate use of forced labor in British colonies – relative to other European colonizers.

This lobby also punished colonial officials for extra-legal and extreme violence. On several occasions, colonial officials who used extreme violence in the colonies lost their jobs and reputations because of the missionary lobby. On at least one occasion, the Tory's lost control of the government because they used extreme violence in the colonies. Over time, this made colonial officials more reluctant to use extreme violence and thus created incentive for colonial officials to reach nonviolent compromises with indigenous elites.

Religious liberty in British colonies and organizational forms brought in by missionaries also fostered the development of organizational civil society in the colonies. Once these non-state-controlled religious organizations became established, they sometimes became important centers for anti-colonial resistance. Because these organizations were already large and firmly established before they became involved in anti-colonial activism the state would have had to use extreme violence to suppress them – something British colonial officials became increasingly reluctant to do.

Thus, these organizations were able to pressure the British to gradually devolve power. As a result, at the time of independence a higher proportion of indigenous people in British colonies had experience running Western-style bureaucratic organizations and political

parties were often already in place. Consequently, the democratic institutions the British instituted when they freed colonies had a better chance of surviving the initial shock of independence.

Mission-initiated moderation of colonial abuses in British colonies may have fostered democracy in several ways. First, it may have fostered economic development by increasing transfers of resources to the colonies. Economic development is associated with democracy and stability of democratic transitions.

Second, missions-initiated moderation of abuses helped create more rule-based and less corrupt pattern of colonial rule, which may have influenced the political culture of post-colonial elites. Research suggests that former British colonies and areas with more Protestants are significantly less corrupt – even when we control for level of democracy and other relevant factors. Research also suggests that low corruption fosters economic growth and stabile democratization.

Third, mission-initiated reforms reduced distinctions between elites and non-elites. This may have forced post-colonial elites to integrate more people in any ruling coalition, which created pressure for more rule-based patterns of governance.

Finally, mission evangelistic and reform activism and mission-initiated religious liberty fostered the growth of organizational civil society in British colonies. This indigenous-lead civil society pressured the British colonial government to gradually transfers power to indigenous elites and created the foundation for post-colonial civil society. Many scholars argue that a robust civil society helps foster stabile democracy. In the rest of this chapter, I discuss these arguments in greater detail.

*Fractured Colonial Domination in British Colonies:*

Religious liberty in British colonies caused a fracturing of colonial elites which had the inadvertent consequence of moderating colonial policy. Again I focus on four major Western groups competed to maximize their interests: businesspeople, colonial governments, settlers, and missionaries. Again I bracket indigenous groups because I do not believe they differed systematically between colonizers. Sometimes the interests of missionaries and these groups overlapped and they cooperated. Other times their interests conflicted, and each tried to restrict the others to maximize their own interests (Greenlee and Johnston 1999: 4, 6, 35-8, 58; Oddie 1996b; 1999: 182, 197; Sundkler and Steed 2000; Miller and Stanczak 2000; Hutchison 1987: 9; Sanneh 1989: 98, 113-122; Boxer 1973: 151, 169, 271; Cox 1997; Stanley 1990).<sup>41</sup> Colonial states and businesspeople did not want the resentment and occasional violence created by religious conflict and mission initiated social reforms; missionaries did not want the resentment created by colonial violence, forced labor, trade monopolies, and racially-based laws. Thus, each tried to restrain the other to maximize their own interests.

Business elites primarily wanted to make money and make it quickly. Life expectancies of Europeans in the colonies were often dismally low (Acemoglu, Johnson, and Robinson 2001; Miller 1994; Ferguson 2002: 12, 156-60). Thus, business people often wanted to make money and get home before they died – especially in areas with high death-rates.

Colonial administrations wanted stability, taxes, prestige, and political support back home. They wanted to prevent uprisings that threatened their lives and the lives of settlers and were sometimes willing to use extreme violence in order to squelch rebellion (Ferguson

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<sup>41</sup> I do not want to imply that *all* businesspeople and colonial officials opposed missions; some were committed Christians and worked to support missions (van der Veer 2001: 23). I am talking about general tendencies.

2002: 146-54, 193-94, 326-29; Tony Smith 1978). Home governments pressured them to make sure expenditures did not exceed revenues.

Settlers wanted to maintain control of land and resources, preserve their privileged status *vis-a-vie* indigenous peoples, and sustain their privileged access to senior colonial positions (e.g., Kelly 2000b; 2000d; Furley and Watson 1978: 87-88). They also wanted to prevent uprisings that threatened their lives and property.

Missionaries primarily wanted to convert people. Sometimes this led them to intervene on behalf of those they were trying to convert. During the colonial period, missionaries were also often in a unique bridging position between the colonized and the colonizing state. This gave them a unique ability to transfer information about colonial abuses and selectively mobilize political pressure. Indigenous people suffered most from abuses and would have been the best advocates of their own interests, but did not have political power in the colonizing state. Colonial officials, business people and settlers had power in the colonizing state, but often benefited from abuses like slavery, forced labor, and so on. Thus, they had little incentive to fight these abuses.

Missionaries were widely dispersed through the colonies and thus were directly exposed to many colonial abuses of indigenous people. But, missionaries did not benefit from most of these abuses. In fact, abuses often hampered missionary work because abuses turned local people against Westerners and thus, against Christianity. But, unlike indigenous peoples, missionaries had power in the colonizing state. Missionaries had a broad group of religious supporters and funders in the colonizing society that they wrote to regularly and that they could mobilize against abuses. Thus, prior to the development of powerful international

human rights organizations and extensive international news organizations, missionaries and their supporters were often the main group fighting colonial abuses.

*Caveats:* By focusing on missionary restrictions of colonial abuses I do not want to suggest that most Western missionaries were anti-colonial agitators – they were not. Most missionaries were not against colonialism *per se*; colonialism allowed them to enter many countries. But most wanted a moderate form of colonialism (e.g., Greenlee and Johnston 1999; Hutchison 1987: 92; Oddie 1978; 1999: 182-4, 197; Cox 1997; Stanley 1990: 104; Robert 2002a; Forster 2003). Harsh forms of colonialism angered indigenous people against the West and thus against Western Christianity. This hampered conversions and put missionaries at risk (e.g. see Johnston 1888: 536; Booth 1897; Lodwick 1996: 2; Hutchison 1987: 9; Cox 1997; Oddie 1978: 19, 21, 24, 40; Miller and Stanczak 2000; Stanley 1990; van der Veer 2001: 66-69). Many missionaries were also motivated by humanitarian concern (e.g., Oddie 1996b).

During much of the colonial period, most missionaries thought colonialism was inevitable for most nonwestern societies (Hutchison 1987: 92; Greenlee and Johnston 1999; Cox 1997; Stanley 1990: 111-32). In these circumstances they sometimes worked to bring in the colonial power that best fit both their interests and what they perceived to be indigenous people's interests. Thus, Protestant missionaries sometimes encouraged the British government to colonize areas to protect indigenous peoples from the exploitation of European settlers, Muslim slave traders, or Catholic colonizers. Protestant missionaries generally thought British colonialism gave greater religious freedom and was less exploitative than the other options (Greenlee and Johnston 1999; Stanley 1990: 111-32; Cox



1997; Comaroff and Comaroff 1997; Stocking 1987: 240-45; Walls 1982; ). Similarly, French Catholics often encouraged the French to colonize areas before other did; the French government subsidized Catholic missions until the beginning of the 20<sup>th</sup> century (Tudesco 1980; Lesourd 1931).

However, when missionaries thought a society could avoid colonization *and* had freedom to evangelize – as in Thailand, Ethiopia, Madagascar, Japan, and post-Opium Wars China – they often tried to help indigenous rulers avoid colonization (e.g., Shen and Zhu 1998; Wyatt 1982: 183; Bohr 2000; Wong 1999; Cooksey 1935; Greenlee and Johnston 1999: 19, 104-5). Other times they helped indigenous rulers negotiate protectorates that guaranteed substantial independence to indigenous peoples and limited the power of European settlers (Greenlee and Johnston 1999: 36-8; Comaroff and Comaroff 1991; 1997; Stanley 1990: 91-8, 111-32; A. Ross 1996: 25) or helped indigenous peoples resist existing colonization (Kaplan 1995: 26-28; Latourette 1949: 21; McLoughlin 1984; 1990; Frykenberg 1999: 183-4; Stanley 1990: 91-98, 146-55; Booth 1897; Mackenzie 1887; Philip 1828).

Although missionaries were important in moderating colonial abuses, they did not always resist them – that was not their primary goal. They were more likely to resist when (a) they were directly exposed to abuses, (b) the exploitation hampered conversions and (c) they had greater independence from state control (Miller and Stanczak 2000; also see Oddie 1978; Greenlee and Johnston 1999: 13, 34-8; Sundkler and Steed 2000: 283-86).

For example, prior to the First Opium War, missionaries did not openly resist the British opium trade. In fact, to gain access to China some worked as translators for opium trading companies. However, the Opium Wars changed two things that enabled and mobilized missionary attacks on the trade. First, missionaries gained the ability to enter China without

working for trading companies. Thus, missionaries were not forced to compromise morally in order to reach the Chinese people. The British government and business elites could no longer easily punish them by cutting off their access to the Chinese. Second, missionaries entered China and saw both the consequences of addiction, and the anti-Western sentiment it created. This exposure incited their compassion. Missionaries also realized the opium trade hampered their primary goal of converting Chinese (Miller and Stanczak 2000; Johnston 1888: 536-50).<sup>42</sup> Similarly, in Dutch colonies (where the government initially paid missionary salaries, screened them individually, determined where they could work, and moved them around regularly so they did not gain undue influence in any one place), missionaries initially protested Dutch military brutality, but when the government threatened to expel them, they quickly quieted down (Boxer 1973: 150-1, 154-5; Van den End 2001a: 2001b).<sup>43</sup>

Still in spite of these caveats, missionaries were important in moderating colonial abuses. They were also more successful at moderating these abuses in British colonies than in historically-Catholic colonies.

#### *Missionary Exposure to Abuses:*

Because missionaries wanted to convert people, they spread broadly throughout the world. Evangelical teaching emphasized that without salvation through Jesus Christ, people were damned to eternal separation from God. Although missionaries varied on exactly what

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<sup>42</sup> Attitudes toward Opium also changed over time. For example, the great Evangelical leader William Wilberforce who spearheaded the British abolitionist movement and the movement to allow missionaries in British colonies was a regular opium user. Negative attitudes towards opium developed partially in connection with the temperance movement – also initiated by Evangelicals.

<sup>43</sup> Later the Dutch stopped paying missionary salaries, but still required each missionary to get government permission to work in each district (Rauws *et al.* 1935; Van den End 2001a: 2001b; WMC 1910d: 137-39).

this meant, some missionaries described this as a Niagara of souls bound for hell. The horror of this compelled many to the mission field (Stanely 1990: 65-66). Evangelical teaching also emphasized that before Christ would return the Gospel need to reach people “from every language, tribe, people, and nation” (e.g., Matthew 24: 14, 28: 19; Revelation 5:9, 11:9, 14:6). Thus as an explicit strategy, missionaries sought to convert people from as many different ethnic and linguistic groups as possible. Especially, prior to the 20th century, this often involved accepting very high death rates (e.g., Sundkler and Steed 2000: 175; Miller 1994; Ferguson 2002: 78, 156-60; Spence 1984: 66-70; Walls 1996a; A. Ross 1996). Many other groups were not willing to accept this risk of death without large profit margins. For example, in the Congo the only Westerners living in the interior – and thus regularly exposed to the abuses by the rubber companies – were missionaries and employees of the rubber companies (Hochschild 1998).

Moreover, because in the missionary’s spiritual economy all souls are equally valuable, missionaries sought to convert poor and marginalized people as well as wealthy and powerful ones. In fact, poor and marginalized groups were often more responsive to the Christian Gospel and thus received regular missionary attention (e.g. Frykenberg 1999; Oddie 1969). Because missionaries worked in remote areas with most ethnic groups and with poor and marginalized peoples, missionaries were directly exposed to many colonial abuses of indigenous people (e.g., Hochschild 1998; Sundkler and Stead 2000: 284-86; Stanley 1990).

Missionaries were also in a position to learn indigenous perspectives on colonialism. In many areas, indigenous people interacted more closely with missionaries than with any other Western group (e.g., Fairbank 1974: 1, 1985: 2; Comaroff and Comaroff 1991; 1997; Swanson 1984; Oddie 1996b; Peel 1996). In order to preach and translate the Bible, many

missionaries became fluent in indigenous languages. In order to convince people to change their religion, many missionaries gained detailed knowledge of other cultures.<sup>44</sup> Not all missionaries become fluent, not all were culturally sensitive, and misunderstandings and distortions occurred. But many missionaries spent much of their lives trying to learn another language and culture well enough to convince people to change their religion, to instruct converts, and to train church leaders. In the process, missionaries often became aware of other people's need and concerns (e.g., Oddie 1978; 1996b; 1999; McLoughlin 1984: 1990; Tinker 1979; Bohr 2000; Walls 2002c).

I do not want to overstate this point, most missionaries maintained Western perspectives and identities and maintained their own interests; but they were generally more aware of nonwestern perspectives and experiences than other Western groups. As they grew in this awareness, some underwent something akin to a conversion process (Lian 1997). Some, who went to the mission field with little social agenda, became convinced that preaching was not enough. To do their job effectively, they also had to fight social problems and colonial abuses (e.g., Walls 2002c; McLoughlin 1984; 1990; Oddie 1978; 1996b; 1999; Hutchison 1987; Tinker 1979; Sundkler and Steed 2000: 284-6; Lian 1997; Bennett 1983; Bohr 1972; 2000; Stanley 1990; Russell 1993; Rooke 1978-79; Blouet 1990; Forster 2003).

#### *Missionary Motivation to Fight Abuses:*

Missionaries also had motivation to fight abuses. Many had strong moral convictions and reacted strongly to situations they viewed as unjust, especially when abuses influenced

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<sup>44</sup> In fact, missionaries wrote the first grammars and dictionaries of most languages. Similarly, missionaries were often the first comparative religion scholars and were the first to translate many religious works in to Western languages (e.g., the Ramayana, the Confucian Classics, and the Lotus Sutra) (Walls 1996b; Sanneh 1989; Spence 1984; Pfister 1998; Stanley 1900: 159).

people they knew (e.g., Oddie 1996b). Moreover, because missionaries wanted to convert people, they had to pay attention to their concerns. Most indigenous people in the colonies associated Christianity with the West and the colonizing government (e.g., van der Veer 2000: 66-68; Cox 1997). When colonial abuses angered people against the West and thus against Christianity, this made conversions harder and missionaries position more precarious (e.g., Miller and Stanczak 2000; Cox 1997; Booth 1897).

Missionaries were very aware of how indigenous anger hampered missionary work and often stated it vigorously (e.g., Cox 1997; Miller and Stanczak 2000; Stanley 1990; Patterson 1999; Booth 1897). For example, the following statement comes from “The Committee on The Relations of Commerce and Diplomacy to Missions” at the 1888 *Centennial Conference of the Protestant Missions of the World* in London “[Some colonial policies] are a very great evil standing in the way of all Mission work. They are a standing reproach to Christianity and tend to associate in the natives’ mind immorality and Christianity.” (Johnston 1888: 536).

Thus, many missionaries considered restricting colonial abuses as one of their responsibilities (e.g., Grubb 1938: 275; Oddie 1978; 1996b; 1999; WMC 1910d: 272-82; Greenlee and Johnston 1999: 4-7, 35-38, 58; Cox 1997; Booth 1897; Mackenzie 1887; Philip 1828). Missionary leaders regularly spoke and wrote about “The Christianizing of the Impact of the West on the East” (e.g., Patterson 1999: 98; Robert 2002a; Speer 1904: 659-92). For example, part of the statement by “The Committee on Missions and Government” at the 1910 *World Missionary Conference* in Edinburgh (WMC) reads: “Like the Church at home, the Missions in the colonies are the conscience of the State. . . . [the colonial power]

must be continually reminded of this duty to protect and care for the native” (WMC 1910d: 142). Or similarly,

It is at the same time [missionaries’] duty to exercise their influence for the removal of gross oppression and injustice, particularly when the government is in the hands of men of their own race. . . . They cannot but form convictions as to the wisdom or unwisdom of the “colonial policy” they see in operation around them. These convictions it may be their duty on proper occasions to press with all the influence they can command upon the attention of the State officials responsible (WMC 1910d: 95).

This pattern of reform activism and holding colonial states to account is clear in the minutes of all the major world missionary conferences. All the major world missionary conferences prior to World War II had segments focusing on abuses in the colonies and published books or parts of books which focused on them (Johnston 1888; Ecumenical Conference on Foreign Missions 1900; WMC 1910a; 1910d; International Missionary Council 1928a; 1928b; 1928c; Grubb 1938; also see Yates 1994: 69). Some conferences even signed and published petitions calling for the end of particular colonial abuses (WMC 1910b; Johnston 1888).

Many missionaries also came from socially activist traditions. Throughout the English-speaking world, Protestant missions grew out of the Second Great Awakening. This series of revivals also gave birth to abolitionism, temperance, prison reform and many other social movements (Young 2002; Hutchison 1987; Latourette 1959; 1961; Carwardine 1993; Foster 1960; Timothy Smith 1957; Ziegler 1992; Woodberry 1996b). Many early missionaries were activists in these social movements before going to the mission field, and many members on the boards of missionary organizations were also on the boards of these other social movement organizations (*ibid.*). Thus, many 19<sup>th</sup> and early 20<sup>th</sup> century missionaries were accustomed to social activism in their home countries and continued their activism on the mission field.

The social activism of missionaries and their supporters varied between places and over time. Some missionaries carefully avoided political and social activism. However, clear activist strands continued within the missionary movement throughout the 19<sup>th</sup> and 20<sup>th</sup> centuries (e.g., Robert 2002a; Hutchison 1987; C. Smith 1991; 1996b; Cox 1997; Stanley 1990; Tinker 1979; Bohr 2000).

*Missionary Power to Fight Abuses:*

Missionaries also had the power to restrict some colonial governments – especially the U.S., Australia, New Zealand and Great Britain. For most of the 19<sup>th</sup> and early 20<sup>th</sup> centuries, missionaries made up a large portion of Westerners overseas (e.g., Hutchison 1987: 1-2). In the English-speaking world, missionaries and their children were influential in academia – especially prior to WW II (Hutchison 1987: 1-2; Latourette 1949: 35; Fairbank 1974: 8; 1985: 15-18; Sanneh 1990: 312-15; Walls 1996b). Missionary children were also influential in the Foreign Service – especially in the US (Hutchison 1987:1-2; Chatterjee 1991; Greenlee and Johnston 1999; Kaplan 1995; Reed 1983; Grabill 1971).<sup>45</sup>

Missionary organizations were also large enough to compete with corporations. For example, in 1846 Harvard University's endowment was less than a half million and their annual revenues were less than \$50,000. In the same year, the American Board of Commissioners for Foreign Missions had annual revenues of over a quarter million dollars (P. Hall 1994b: 5-6). Similarly, in 1900 the American Federation of Labor (AFL) had an annual budget of \$71,000; but in the same year the missions board of the Northern Methodists (a single US denomination) had an annual budget of over one million dollars

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<sup>45</sup> The influence of missionaries on foreign policy seems to have been especially strong in Protestant areas, since Protestant missionaries had children (unlike most Catholics missionaries – who were priests and nuns), and in societies where recruitment to the foreign service was open – rather than based on heredity.

(Hutchison 1987: 1-2). Yet, the Northern Methodists were only one of hundreds of missionary organizations, a number of which were similarly large (Dwight 1905: 225-33; 1907: 189-97). In fact in the 19<sup>th</sup> century, the largest missions and Evangelical reform agencies outstripped all but a few commercial banks as the largest and wealthiest corporations in the United States (P. Hall 1994a: 34, 44). Great Britain also had a massive missions sector. In fact, until about 1910 the British invested more money and personnel in missions than North Americans (Dwight 1907: 189-97), although corporations may have been bigger in England as well.<sup>46</sup>

Because missionaries had their own resources and transportation networks, they could smuggle out photographs and reports about abuses (e.g., Hochschild 1998: 190-1; Sundkler and Steed 2000: 284-6).<sup>47</sup> Moreover, when governments and international organizations set up commissions to investigate abuses, missionaries could transport commission investigators, translate for them, and introduce them to key informants. This allowed investigators to skirt the control of government and concessionary company officials (e.g., Hochschild 1998; Sundkler and Steed 2000: 284-6).

Missionaries and their supporters also helped found and support a number of organizations for social reform in the colonies and the protection of indigenous peoples. For example, the *Anti-Slavery Society*, *The Aborigines Protection Society*, *The Society for the*

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<sup>46</sup> Recent scholarship stresses the importance of non-governmental organizations (NGOs) and international non-governmental organizations (INGOs) in spreading ideas, channeling government activity and fighting abuses (e.g., Boli and Thomas 1999). However, this literature usually ignores missionary organizations. Yet missions dwarfed and predate other NGOs and INGOs (Chabbot 1999: 226-231; Hutchison 1987: 1-2; P. Hall 1994a: 1994b; Young 2002).

<sup>47</sup> To prevent this, the Dutch East India Company did not allow missionaries to use their own ships and forced them to send all letters to the Netherlands in an unsealed envelop on company ships (Van den End 2001a: 2001b).



*Suppression of the Opium Trade, The United Committee for the Prevention of the Demoralization of the Native Races by the Liquor Traffic, The International Bureau for the Protection of Native Races, and The American Congo Reform Association* (Missionary Register 1824; Beach and Fahs 1925: 41, 42, 53; Stocking 1987: 240-54, 272; Hochschild 1998; Sundkler and Steed 2000: 284-6). Even when missionaries did not form particular colonial reform organizations, they were often the main source of information about human rights abuses for these organizations (see e.g., Hochschild 1998; Sundkler and Steed 2000: 285; Walls 1991). These separate organizations allowed missionaries to influence colonial policy without directly threatening the status or focus of their missionary organizations.

Missionaries were especially crucial in exposing abuses because of their media empire. This was especially true prior to the development of broad, secular, international news organizations like *Time Magazine*.<sup>48</sup> During the 19<sup>th</sup> and early 20<sup>th</sup> centuries, missionaries were the major group that wrote home and gave regular speeches about life in colonial territories. They had to actively communicate with their constituents in the West, because they required regular financial support to carry out their work (Fairbank 1985: 2, 4, 18). Plus, missionary journals and newsletters had broad circulation in many Western societies – far broader than circulations of colonial and geographic journals (e.g., Walls 1996a: 251-2; Tudesco 1980: 56; Fairbank 1985: 2, 15-18; Stanley 1990: 111-12). In fact, many historians argue that most Westerners would have had little knowledge of what was happening in the colonies without missionary periodicals and reports (*ibid.*, Fairbank 1974: 1; Latourette 1949: 32-4; Hutchison 1987: 1; Manning 1998: 93-4; Patterson 1999: 94). Thus,

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<sup>48</sup> Actually, Henry Luce the co-founding and editor-in-chief of *Time Magazine* was a missionary kid from China.

missionaries could compete with colonial and business elites to report and frame issues in the colonies and fight for their interests.

Because missions were supported by broad segments of many Western societies, missionaries also had a political power base. They could mobilize their supports to pressure government officials to change colonial policy or reign in particular colonial officials. In fact, on several occasions missionary pressure forced the British colonial government to recall governors and magistrates (Rooke 1978-79: 55; Russell 1993; Heuman 1994; Russell 1993).

I do not want to overstate missionaries influence; they were not omnipotent and often lost when they tried to fight colonial abuses. There were more settlers than missionaries in many societies and settlers controlled more resources than missionaries in many places. Some corporations, such as Rothschild Bank, the British South Africa Company, and the British East India Company also controlled more resources than mission organizations and had extremely powerful political connections. These settlers, banks and companies were influential in shaping British intervention in the colonies (Ferguson 2002: 223-30, 280-84). Missionaries were an alternative voice, but had to fight to be heard over the din of other interest groups.

Moreover, missionaries sometimes ignored abuses even in British colonies. For example, few missionaries protested the slaughter of Indians after the “Indian Mutiny.”<sup>49</sup> Missionary also had abuses of their own. But overall, non-state missionaries moderated colonial abuses and they were better able to do it in the colonies of powers with a strong non-

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<sup>49</sup> This is perhaps because the military action was so popular in England, so many of those killed by Indians during the “mutiny” were missionaries and Indian Christians, and as a result, few missionaries were initially aware of or as upset about the brutality of the British military response. Missionary protest was rare and long after the fact (van der Veer 2001: 86; Thompson 1925).

state religious tradition (such as Great Britain), than in societies where the state exercised direct control over religious groups (such as France, Spain, Portugal, Italy, and Belgium).

*Missionaries and the Transformation of British Colonialism:*

To this point I have given a general and theoretical overview of the ability and motivation of missionaries to restrain colonial abuses. In the following section I focus on some of the specific ways missionaries and their supporters transformed British colonialism.

This influence is especially clear in the transformation of British colonialism between the 18<sup>th</sup> and 19<sup>th</sup> centuries – a transformation that coincides with the rise of the Protestant missionary movement in England. The economic historian Niall Ferguson writes that British colonialism in the eighteenth century was, “at best, amoral. ... Native peoples were either taxed, robbed or wiped out” (Ferguson 2002: 116). For example, the British were the world's leading slave traders. They procured slaves in Africa, used them in their colonies, and sold them to others. Death rates of slaves on the ships and plantations were high. The British set up monopoly trade relationships and used violence to extract resources and labor with limited investment. In some areas British settlers completely exterminated indigenous peoples. Conversely, although British colonialism was often quite violent, it was also often culturally tolerant. British colonizers made little effort to change other's cultures. Their goal was to make money, not disciples.

“However, the Victorians had more elevated aspirations. They dreamt not just of ruling the world, but of redeeming it. It was no longer enough for them to exploit other races; now the aim became to improve them” (Ferguson 2002: 116). British colonialism became less violent and the government invested more resources in indigenous societies. But, the British

– and particularly missionaries – began to try to change other’s cultures as well. This transformation in colonial policy coincided with the missionary movement and is directly linked to it.

For example, missionaries and their supporters were crucial to the development of the British colonial concept of “trusteeship” – i.e., the concept that the colonial government had an obligation to develop the colonial territories beyond what was cost efficient to extract resources and with the ultimate goal of independence (Stanley 1990: 69-70, 149; Porter 1988; Mellor 1951: 417; Robinson 1978; 1979; 1980; also see Oddie 1999: 183-97; Greenlee and Johnston 1999; Cox 1997; Ellison and Walpole 1907; WMC 1910d: 115-21, 142-43; Booth 1897).<sup>50</sup> Edmund Burke first proposed the concept of trusteeship in the 1770s. Although he argued for trusteeship based on divinely sanctioned natural law and was heavily influenced by his Quaker tutor, he was not himself an Evangelical. However, missionaries and their supporters had a far greater influence. Initially the concept of trusteeship had little currency outside missionary circles. But they continually promoted the concept in the media and tried to hold government policies to this standard.<sup>51</sup> Over time the concept spread until in the 20<sup>th</sup>

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<sup>50</sup> This attitude is reflected in the statement by the “Committee on Missions and Government” at the 1910, Edinburgh, *World Missionary Conference*.

Even men in high public positions do not hesitate to speak of all “coloured” races as if they were doomed to perpetual material servitude and had no higher destiny than to be hewers of wood and drawers of water for the “white man.” ... [Colonies are generally] administered, not in the first instance for the benefit of their own people, but for the aggrandizement of the nation which has annexed them. ... We desire to see realized the only possible justification of that annexation is a deliberate, steadfast, and thorough policy for the education of the people in the highest and fullest sense of that term. ... Where territories peopled by such races are under the rule of Christian Powers, the prime duty of such Powers is the education and development of these races.” (WMC 1910d: 115, 116, 119; also see 272-82 and Ellison and Walpole 1907).

<sup>51</sup> For example, in 1923 J.H. Oldham – a prominent leader in the International Missionary Council - played a decisive role in securing from the Colonial Office the famous ‘Devonshire Declaration’, which stated:

Primarily Kenya is an African territory, and His Majesty’s Government think it necessary definitely to record their considered opinion that the interests of the African native must be

century the language and ideology of trusteeship was shared by many imperial administrators and propagandists whose Christian commitments were minimal or non-existent – even if they sometimes needed prodding to actually apply the concept in more than rhetoric (Stanley 1990: 68-70, 149; Ferguson 2002; Cox 1997; Hodgkins 2002:173-77, 194-97).

As missionaries spread throughout British colonial territory, they were exposed to the abuses of the slave trade and the decimation of indigenous peoples and they began to inform their supporters back in Great Britain about these abuses. In the West Indies Anglican clergy worked primarily with whites and thus did not openly complain about slavery. But Nonconformist missionaries began working among slaves. Initially they tried to stay apolitical – they needed slave owners’ permission to work with the slaves. Missionaries gathered slaves for weekly religious services, trained some to lead congregations, and taught congregants how to read and write.

Among other things, these literate slaves began to interpret the Bible for themselves and read newspaper accounts of debates over political rights in Europe, and British support for an uprising against Russian domination in Poland. Slaves were also able to meet and discuss plans outside the direct observation of their masters. When several Nonconformist church leaders were implicated in a slave uprising, slave owners burned down Nonconformist churches, put several missionaries in prison, and began barring slaves from learning to read and from meeting for worship. For Nonconformist missionaries this was the final straw. Not only was slavery abusive, it now threatened the eternal destiny of African souls.<sup>52</sup>

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paramount, and that if, and when, those interests and the interests of immigrant races should conflict, the former should prevail. (cited in Stanley 1990: 149).

It took more years before the British actually gave African interests preeminence.

<sup>52</sup> In this section I focus on the campaign for the *immediate abolition of slavery* which is directly linked to missionary agitation. The campaign for the *abolition of the slave trade* preceded active missionary agitation,

A number of missionaries – some of whom had been imprisoned, tarred and feathered, or kicked out of British slave colonies – began touring Great Britain making fiery speeches and distributing petitions against slavery.<sup>53</sup> Their Evangelical supporters mobilized a massive pressure campaign for the immediate abolition of slavery (Ferguson 2002: 121; Walls 1996a: 251-2; Blouet 1990; Rooke 1978-79; Anti-Slavery Reporter 1830; also see Stanley 1990: 85-91; Miller and Stanczak 2000; Drescher 1999: 35-56). In fact, the relevant parliamentary committee was so amazed by the Nonconformist dominance in the anti-slavery petition campaign that they kept track of the religious traditions of petitioners. The historian Seymour Drescher calculates that in Great Britain over 59 percent of adult Nonconformists,

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but had strong religious roots. Throughout the English speaking world there was substantial overlap between those who mobilized the abolition of the slave trade and those who mobilized the Anglo-Protestant missionary movement.

Quakers and Methodists were early opponents of slavery. They believed it violated the Biblical injunction to “Do unto others as you would have them do unto you.” (Matthew 4:12). But opposition did not become widespread enough to influence legislation until the 1780s. The parliamentary campaign against the English slave trade was led by a group of Evangelical Anglicans known as the Clapham sect; though they had strong Nonconformist support – especially Quakers.

“The Clapham sect” was spurred towards abolitionism by Zachary Macaulay. Macaulay had worked as the manager of a sugar plantation in Jamaica, but could not reconcile his work with his Christian faith. The daily whippings he witnessed sickened him too much (Ferguson 2002: 118). He quit and returned to England determined to fight the trade. Among other things, he went to Africa and interviewed African chiefs who supplied slaves and sailed on a slave ship across the Atlantic to see how slaves were treated. Armed with inside information, he joined with a group of friends at Holy Trinity Church in Clapham to mount a parliamentary campaign against the trade. One member of this group was William Wilberforce; Wilberforce led both the parliamentary campaign to ban the slave trade and the campaign to force the British East India Company to allow missionaries into India (Ferguson 2002: 118-21).

Although these Quakers and Clapham sect members were not originally spurred by reports from missionaries, many in both groups were active in mobilizing and supporting the concurrent rise of the Anglo-Protestant missionary movement and saw abolitionism and missions as related humanitarian work (e.g., see Cox 1997; Walls 1991). Historians of abolitionism in Great Britain often note the close connection of the two movements (Drescher 1999: 40).

<sup>53</sup> For example, *The Baptist Magazine* (1832) reports on a speech by the missionary William Knibb

...the Society’s missionary stations could no longer exist in Jamaica without the entire and immediate abolition of slavery. He had been requested to be moderate but he could not restrain himself from speaking the truth. He could assure the meeting that slaves would never be allowed to worship God till slavery had been abolished. Even if it were at the risk of his connexion [sic.] with the Society, he would avow this: and if the friends of missions would not hear this, he would turn and tell it to his God nor would he ever desist till this greatest of curses were removed, ... (p. 325).

and over 95 percent of adult Wesleyan Methodists, signed petitions calling for the end of slavery (1999: 40).

Allied with a small group of intellectual, free-market economists; Evangelicals were able to get slavery banned in 1834 and get the British navy to suppress the slave trade conducted by other countries. This was done against direct opposition of planters and Liverpool slave traders at a time when slavery was still highly profitable (Ferguson 2002: 119-22; Stanley 1990: 90; Rooke 1978-79; Drescher 1999: 35-56).

Spurred by their success with abolitionism and concerned by reports from missionaries in other colonies, Evangelical and Quaker missionary supporters established *The Parliamentary Select Committee on Aboriginal Tribes* in 1835. This group commissioned a worldwide investigation of “what measures ought to be adopted with respect to the Native Inhabitants of Countries where British Settlements are made, and to the Neighbouring Tribes, in order to secure them the due observation of justice and the protection of their rights, to promote the spread of Civilization among them, and to lead them to the peaceful and voluntary reception of the Christian Religion.” (cited in Stocking 1987: 241; also see Walls 1991). Over the next several years, the commission collected well over a thousand printed pages of testimony about the consequences of colonization (Select Committee 1837). Much of the testimony came from missionaries. Thomas Fowell Buxton – the leader of the *Select Committee* and vice president of the *Church Missionary Society* – summarized the impact of British colonialism as “little else than one uniform system of cruelty, rapacity and murder” (cited in Stocking 1987: 241; also see Walls 1991).

In 1837 the *Select Committee* was reorganized into the *Aborigines Protection Society*. It also commissioned a series of ethnographies to collect “authentic information concerning the

character, habits and wants of the uncivilized tribes.” The society hoped to use this information to alter public opinion and create public pressure on the government and colonists to change their exploitative behavior. They even set up auxiliary societies to train sailors in the hope to “excite proper sentiments in the minds of those likely to be brought into contact [with aboriginals]” (cited in Stocking 1987: 242, 244).

Evangelical reform efforts were bolstered when two Evangelical members of the Clapham sect, Lord Glenelg and James Stephen, took over leadership of the colonial office in 1935 (Stocking 1987: 241; Knaplund 1953; Hennell 1995). Later the Evangelical Prime Minister William Gladstone served a similar role (e.g., Stanley 1990: 47; Ferguson 2002: 197-202; Bebbington 1993; Stocking 1995: 35-7).

Wherever missionaries went, they were exposed to abuses and had to decide how to respond. Many missionaries working in South Africa were shocked by the abuses of indigenous peoples by white settlers. One of them, Dr. John Philip, wrote a book in which he catalogued some of the abuses: *Researches in South Africa* (1828), and traveled in England to raise pressure for the government to stop them. Through Undersecretary James Stephens (mentioned above) Philip and his supporters were able to get ordinances passed that became the basis for a non-racial constitution for the Cape Colony (Stanely 1990: 91-8; A. Ross 1986; 1995). Later missionaries like John Mackenzie continued the struggle for equal legal protection for whites and blacks (Comaroff and Comaroff 1997: 396-97; Walls 1991; J. Mackenzie 1887; also see Booth 1897).<sup>54</sup> Although Anglo-missionaries ultimately lost the struggle when Boer settlers took over the South African government in the 20<sup>th</sup> century, they

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<sup>54</sup> John Mackenzie argued that “There is nothing whatever in the character of the South African native to deter us from trusting him with the exercise of ... “rights” after the manner of the English constitution.” (1887, vol. 2: 456).



did influence colonial policy for almost a century and earned the ire of white settlers in the process (e.g., Ferguson 2002: 278; A. Ross 1986; 1995).

In India, missionaries working in rural areas were confronted by the abuses of landless peasants (*ryots*). The British East India Company (BEIC) rented land in large blocks to Indian *Zamandars* and British Indigo farmers. These tenants parceled out land to *ryots*, who bore the risk of the crop and were often exploited because these large landholders had their own private police forces and no external legal authority. From the 1820s through the 1850s missionaries mobilized a campaign to change the rules of land tenure and expand an independent police and court system into the rural areas to protect *ryots* from landholder abuses. Missionaries like Rev. James Long were imprisoned and fined for their activism in this struggle. But ultimately they were partially successful.<sup>55</sup> However, even with an expanded legal system, landless peasants did not have the resources to defend their interests. Thus, missionaries also brought cases to court on behalf of their low caste constituents, often to the consternation of high caste landlords (Oddie 1978; 1996b; 1999; Stanley 1990: 104; Jackson 1995).

Missionaries also restricted British colonial officials. For example, in 1865 Edward Underhill, the Secretary of the Baptist Missionary Society, wrote a letter to the colonial secretary outlining the deteriorating economic situation for former slaves in Jamaica and describing a number of abuses. He asked the colonial office to initiate a series of economic and political reforms – including expanding the suffrage. The colonial office forwarded the letter to Governor Eyre of Jamaica who responded angrily and began attacking Nonconformist missionaries.

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<sup>55</sup> Recent scholarship shows the long-term economic impact of differences in the land tenure system in India (Banerjee and Iyer 2002)

When the content of the letter became public, blacks throughout the island began meeting to discuss it. These “Underhill Meetings” provided a platform for those who were angry with the government to air their grievances. In this period of heightened tension, a squabble over a court decision escalated into a riot at Morant Bay in which several white people were killed. Governor Eyre sent in soldiers who killed several hundred blacks, flogged several hundred more, and burnt villages without concern for who had taken part in the uprising or not. Governor Eyre also ordered a prominent mulatto leader, George William Gordon, transported from Kingston to the site of the uprising so that he could be court marshaled and hung without benefit of a normal trial. Gordon had no direct link to anyone who participated into the Morant Bay uprising.

The Colonial Office initially commended Eyre for his decisive action, but missionaries sent back damning reports and their supports mobilized a campaign that resulted in Governor Eyre being recalled and put on trial for murder. Although they were not fully successful, missionaries and their allies felt it was important to argue the case to set a precedent so that English law would apply equally to whites and non-whites and so colonial officials would think twice before slaughtering civilians (Stocking 1987: 251-2; Semmel 1963; Russell 1993; Heumann 1994; Ferguson 2002: 191-95; Stanley 1995). I am not aware of a similar case in French, Spanish, Portuguese or Italian colonies – although many administrative massacres occurred (e.g., Tony Smith 1978: 84; Coquery-Vidrovitch 1972; Hochschild 1998: 280-81).

These are merely a few example of a more general pattern. Missionaries were also a dominant force in ending the opium trade, restricting the gun and liquor trade in Africa, fighting for native land rights, ending some forms of forced labor, mitigating other colonial labor abuses, protesting abuses of civilians during the Boer Wars, and fighting for the rule of

law in the colonies (Miller and Stanczak 2000, 2002a; Robert 2000; Sanneh 1999; Hochschild 1998; Lodwick 1996; McLoughlin 1984; 1990; Greenlee and Johnston 1999; Hutchison 1987; Johnston 1888: 548, 554, 556; WMC 1910d: 17-18, 63-71, 76, 80, 84-5, 115-7, 142; Oddie 1969; 1978; 1996a; 1996b; 1999; Sundkler and Steed 2000; Isichei 1995: 189; Stocking 1987: 85; Stanley 1990; Semmel 1963: 176-9).

It is hard to imagine many of these abuses being restricted without active missionary involvement. For example, through the 19<sup>th</sup> and early 20<sup>th</sup> century the British financed much of the colonial government in India by taxing the opium trade and growing opium on government land (Johnston 1888: 546; Oddie 1978; Lodwick 1996: 3, 73). Colonial officials argued that the government would go bankrupt if the trade ended. Business people also profited handsomely from it. However, after missionaries entered China, they virulently attacked the trade and British governmental participation in it. They argued that Great Britain should abandon this “national sin” regardless of the financial consequences. Otherwise “God would rain down His judgment on the nation.” Missionaries were also the major group that countered colonial propaganda that opium was not addictive or harmful to users (e.g., Johnston 1888: 547; Lodwick 1996; Miller and Stanczak 2000).

The following are representative statements from the committee on “The Relations of Commerce and Diplomacy to Missions” at the *Centenary Conference on the Protestant Missions of the World* held in London in 1888. I have underlined some of the most striking passages.

[Colonial policies such as the liquor and opium trade] are a very great evil standing in the way of all Mission work. They are a standing reproach to Christianity and tend to associate in the natives’ mind immorality and Christianity. ... The outlook in regard to the opium and drink traffic of a so-called Christian country is such as to lead one to question whether on the whole Britain is not a

greater curse than a blessing to the world. ... at this moment the Viceroy of India is the largest manufacturer of opium in the world. We are responsible in the sight of God for this culminating wickedness. ... How are the united influences of Missionary Societies and of all the Churches to be brought to bear upon this evil? ... In [Great Britain] we can say to the Government that when the Treaty expires, the Chinese Government shall be left with as much liberty to make a Treaty as the Government of France is. We must give the Government of China perfect liberty to say what terms it will insert in any renewal of that Treaty. ... for generations to come China will be the worse for what we have done. It is impossible to consider the condition of China, through our action in this matter, without feeling that one has not words to express our sorrow that the land we love should have any connection with a business so fearful. ... We have to reckon with ... Divine Judgment if we neglect this matter. ... We have wronged China as I believe no nation ever wronged another.” (Johnston 1888: 536, 546, 548, 550).

From these statements, we can see the conflict between British missionary leaders and their government, mission leaders’ advocacy of mobilizing political pressure against the government, and missionary motivation in fighting the opium trade because it hampered mission work. Some missionaries even wanted the British to pay the Chinese reparations for the enforced opium trade (Miller and Stanczak 2000: 30).

Often fighting colonial abuses made missionaries unpopular with settlers and with British colonial officials. In fact many of these actions – including the prosecution of Governor Eyre – were unpopular among most people in Great Britain (Semmel 1963; Russell 1993; Heumann 1994).

Missionaries and their supporters did not act alone. In some of the incidents described above, they cooperated with a small group of anti-religious political liberals – such as John Stuart Mill (e.g., Russell 1993; Ferguson 2002: 194-5). However, this small group of radical intellectuals was not unique to Great Britain. France, Belgium, and others had small groups of egalitarian radicals who were critical of colonial policy (e.g., Hochschild 1998; Homet 1934; Coquery-Vidrovitch 1972; Jennings 2000), but these intellectuals lacked the first-hand

information and broad power base of the non-state missionary movement. Thus, although they critiqued abuses, they were not able to mobilize broad social pressure for government policy to change. It is unlikely that these colonial reform movements would have had the same scale in Great Britain without the information, interests, and political organization of missionaries and their supporters. One way we can demonstrate this is by comparing the relative progression of reform movements – such as abolitionism – between Great Britain and other colonizers.

*Comparison of British and Other European Colonizers:*

No matter what the influence of missions on British colonialism, it would not explain variation in post-colonial democracy unless missionaries had less positive influence in other societies. In chapter 2 I argued that Protestant missionaries were more pervasive in British colonies and all missionaries were more independent from state control in British colonies than in French, Spanish, Portuguese, Belgian, and Italian colonies. In the following section I demonstrate how these differences in missionary exposure and power influenced some of the differences in colonial abuses between the British and these other colonizers.

Prior to the rise of the Nonconformist missionary movement, British colonialism was virtually indistinguishable from other forms of colonialism. However, in the 19<sup>th</sup> and 20<sup>th</sup> centuries this changed. In multiple ways, the British became less abusive, ended their abuses earlier, and were more likely to punish abusive colonial officials than other European colonial governments. Historical evidence suggests that these patterns are directly linked to differences in missionary influence between these colonizers. In the following section I demonstrate this argument with the abolition of slavery, the moderation of forced labor, the

minimization of violence during decolonization, and the process of devolving power to indigenous institutions. I then argue how this variation in abuses may explain some of the variation in post-colonial democracy.

*1) The End of Slavery:*

The British were the first country to permanently ban slavery in their colonies (Harmer 2001; O'Neil 1998). In 1807 The British banned the slave trade and in 1834 they abolished slavery throughout the British Empire (Harmer 2001; O'Neil 1998). Moreover, unlike many other colonizers, they actually enforced these laws (Drescher 1999: 35-52; Harmer 2001: 63, 95; O'Neil 1998: 290; Jones 1987:14-21). The very act of abolishing slavery in British colonies undermined the institution in other societies and created pressure for similar abolitions (N. Hall 1992). However, the British also deployed their fleet to block the slave trade and applied diplomatic pressure to make other countries ban slavery as well. As late as 1873, British gunboats forced the Muslim sultan of Zanzibar to end the slave trade there (Ferguson 2002: 159).

The core leadership and main support for all these actions came from Nonconformist Protestants and Evangelical Anglicans and – as discussed earlier in this chapter – the mass mobilization for immediate abolition was a direct result of agitation by Nonconformist missionaries (Ferguson 2002: 122; Cox 1997; Rooke 1978-79; Blouet 1990; Martin 1999; Drescher 1999: 35-56; Anti-Slavery Reporter 1830). Even the ending of slavery in various nonwestern societies was directly linked to missionaries and their converts (Sanneh 1999).

As we can see in Table 7, other colonial governments banned the slave trade and abolished slavery later than the British – often as a result of British pressure and support.<sup>56</sup> The British bullied the Spanish and Portuguese into legally banning the slave trade – but Spanish and Portuguese did not enforce this ban themselves – the British navy did. In fact, slave markets continued to function openly in Spanish and Portuguese colonies. Even the French and Dutch took up the cause rather half-heartedly under British prodding (Ferguson 2002: 122; Jones 1987: 14-22; Kielstra 2000; Drescher 1999; Jennings 2000).

|                             | <i>British</i> | <i>French</i> | <i>Dutch</i> | <i>Spanish</i>    | <i>Portuguese</i>       |
|-----------------------------|----------------|---------------|--------------|-------------------|-------------------------|
| End Slave Trade             | 1807           | 1814          | 1814         | 1820 <sup>#</sup> | 1815-1836 <sup>*</sup>  |
| End Slavery in All Colonies | 1834           | 1848          | 1863         | 1886              | 1869 -1910 <sup>@</sup> |

<sup>#</sup> Enforcement was lax and an open slave market continued in Havana for decades (Jones 1987).

<sup>\*</sup> Portugal passed multiple "laws" banning the slave trade, but did not enforce them and so the laws had little impact (Harmer 2001).

<sup>@</sup> In 1869 Portugal declared the emancipation of slaves in their colonies but did not enforce it (Rodriguez 1999: 187); in 1910 slavery finally ends in Portuguese African colonies (Harmer 2001: 53).

The British were distinct in other ways as well. As we see in Table 8, the British were the only European colonizer where a broad popular social movement developed against slavery and the only European colonizer where support for abolition and

<sup>56</sup> There were some earlier partial or temporary abolition movements in other countries. The Spanish – under pressure from the Catholic Church and missionary priests like Bartolome de las Casas – banned further enslavement of Native Americans in 1542 – but this law was largely ignored, did not free existing Native American slaves, and put no restrictions on enslaving Africans (Harmer 2001: 51).

The French briefly banned slavery in 1794 – i.e., after the French Revolution – but then reinstated it in 1802. Even during this brief period, they did not enforce abolitionism rigorously. For example, the Dutch controlled St. Martin and Curaçao in 1794 (the year slavery was officially abolished by the French), but when the French gained control of these islands in 1795, they allowed slavery to continue. The French did not ban slavery again until 1848 – fifteen years after the British. In both cases, French abolition was an elite decision made as the result of a revolution rather than the results of a grassroots social movement (Jennings 2000; Drescher 1999: 35-56).

concern for the amelioration of the conditions of former slaves continued after the abolition of slavery in that countries colonies (i.e., French abolition in French colonies, British abolition in British colonies, etc.)(Drescher 1999; Emmer 1998).

| Table 8: The Association of Abolitionist Social Movements with Various Possible Causal Factors |                |               |              |                |                   |
|--|----------------|---------------|--------------|----------------|-------------------|
| Colonizer:   | <i>British</i> | <i>French</i> | <i>Dutch</i> | <i>Spanish</i> | <i>Portuguese</i> |
| Abolitionist Social Movement   | Strong         | Very Weak     | None         | None           | None              |
| Date of Abolition  | Early          | Middle        | Late         | Late           | Late              |
| Support International Abolition  | Strong         | Weak          | None         | None           | None              |
| Fund Ex-slave Amelioration   | Yes            | Weak          | No           | No             | No                |
| Ban Slave Trade under External Pressure  | No             | Yes           | Yes          | Yes            | Yes               |
| National Non-state Missionaries Work Directly with Slaves                                      | Yes            | No            | No           | No             | No                |
| Society Predominantly Protestant   | Yes            | No            | Yes          | No             | No                |
| Secular Enlightenment Radicals Control Government During Slavery                               | No             | Yes           | Yes          | Yes            | Yes               |
| High 18th & 19th Century GDP   | Yes            | Yes           | Yes          | No             | No                |
| Large Bourgeois  | Yes            | Yes           | Yes          | No             | No                |

What explains the early abolitionism in Great Britain, the strong popular support for it, and the continued concern for the condition of slaves and former slave after British abolition? Factors traditionally associated with the rise of abolitionism: Enlightenment liberalism, capitalist development, and Protestantism do not vary systematically with where abolition movements developed. If Protestantism, economic development, or a large bourgeoisie explained the rise of abolitionism, we would expect a strong abolition movement in the Netherlands, but there was none (Drescher 1999: 196-234).

If secular Enlightenment liberalism explained the rise of abolitionism, we would expect abolitionism in France, the Netherlands, Portugal and Spain – where Enlightenment liberals controlled the government during times when these countries



practiced colonial slavery. But we do not see a strong abolitionist movement in any of these countries. In fact, Great Britain is the only countries listed where secular Enlightenment liberals did not seize control of the state during the time of slavery, yet Great Britain is the one country that had a strong abolitionist movement. Clearly having a secular, enlightenment elite is not the central causal factor.

What is unique about the British is that they were the only European slave-owning society with a strong *non-state-sponsored* Protestant tradition (the Nonconformists) and a strong non-state-controlled missionary movement. Thus the British had *British, non-state-supported* missionaries that worked directly with slaves in British colonies. Because these missionaries worked directly with slaves they had personal experience of the abuses slaves experienced. Most missionaries kept silent for a time in order to maintain their access to slaves. But when masters restricted missionary access to slaves; the muzzle that restrained missionaries came off and they used their insider information to mobilize the campaign for immediate abolitionism. Non-state Protestant religious groups provided the organizational base for the social movement and missionaries provided first-hand accounts of abuses with the passion and consistency to mobilize change.

Both the non-state-church organizational-base and the direct access to slaves by non-state missionaries from the colonizing country were lacking in all the other European colonizers. In French, Spanish and Portuguese colonies only *state-sponsored* Catholics missionaries worked directly with slaves through most of the nineteenth century and their numbers were few (Drescher 1999: 42; Jennings 2000; Scott 1985; Principaux Libraires 1821; Vahl 1892; Grundeman 1867-71). For

example, in the French Antilles there was only one priest for every 10,000 inhabitants. Thus, they worked almost entirely with whites (Drescher 1999: 42; Jennings 2000). Moreover, because of the Padroado/Patronato/ Concordat, the French, Spanish and Portuguese governments had multiple ways to control these missionaries.

Scholars are often puzzled by the lack of Dutch abolitionism because it contradicts all the dominant theories about the origins of abolitionism (e.g., Drescher 1999: 196-234). However, it perfectly matches the theory in this dissertation. During the entire period the Dutch practiced slavery in the Americas, no Dutch missionaries worked in Dutch slave territories (Principaux Libraires 1821; Vahl 1892; Grundeman 1867-71; Dwight, Tupper, and Bliss 1904: 824-25). All the Dutch missionaries listed in my sources worked in Indonesia – not in Suriname or the Netherlands Antilles. The Dutch in Suriname and the Antilles managed the plantations or serviced the white population. Thus, only people who directly benefit from slavery had both intimate contact with slaves in Dutch colonies and political power in the Netherlands. These people had no incentive to expose their own abuses.

Given the decisive role non-state Protestant missionaries had in mobilizing abolitionism in both the U.S. and Great Britain, and the importance of non-state religious groups in providing the organizational form and tactics of modern social movements (see e.g., Young 2002), their absence in other European societies may explain why abolitionism was so anemic outside the U.S. and Great Britain. Presumably, both the early abolition of slavery in British colonies and the continued

attention of the British public towards the amelioration of the conditions of former slaves had some long-term economic and political consequences.

For a more detailed analysis of abolitionism in France, Spain, Portugal, Dutch, Belgian, Italian, and German see *Two: Comparative Analysis of the Origins of Abolitionism*.

## 2) *The Moderation of Forced Labor:*

After the end of slavery, the British used forced labor less pervasively and less violently than other European colonizers. The Portuguese, French and Belgians used extreme abuses to extract resources and labor in some of their colonies, through the 19<sup>th</sup> and first half of the 20<sup>th</sup> century. A common tactic of concessionaire trade companies in the African territories of the French, Portuguese and Belgians was to kidnap African women and threatened them with rape or death to force their male relatives to work. Another tactic was to burn and slaughter villages that did not provide the required labor or raw materials. These tactics were used well into the 20th century (e.g., Hochschild 1998; Sundkler and Steed 2000: 284-6; Isichei 1995: 189; Moreira 1936; Coquery-Vidrovitch 1972).

Protestant missionaries mobilized repeatedly against these forced labor programs – but generally with limited success (e.g., WMC 1910d: 117; Moriera 1935: 11-12). They were successful in stopping some extreme abuses in the Belgian Congo – abuses in which about half the population died in 20 years, but this took over a decade of protest and did not end forced labor there (Hochschild 1998; Sundkler and Steed 2000: 283-86). The French, Belgians, and Portuguese only ended forced labor

after World War II (e.g., Tony Smith 1978: 85; Sundkler and Steed 2000: 784; Manning 1998: 116).

Conversely, in British colonies missionaries repeatedly blocked forced labor programs. For example, in the mid-19<sup>th</sup> century, British planters in Australia and Fiji filled their labor needs by “blackbirding.” At best, traders exchanged axes and other materials to buy the long-term labor of young men and children – often the parents had little idea what they were signing their children into. However, traders often merely raided indigenous villages and kidnapped people. For a while, some missionaries worked within the system to evangelize the “indentured” laborers on the plantations (R. Tucker 1983: 220-24).

However, the trade soon hampered missionary work. Indigenous peoples became hostile to whites and often attacked those who came ashore. In 1871, things came to a head when John Coleridge Patteson – an experienced and culturally sensitive missionary – swam to an island in the Santa Cruz group and was slaughtered by angry inhabitants.<sup>57</sup> The island had recently been raided by blackbirders and Missionaries blamed the attack on the resentment this raid caused. Missionaries wrote angry letters to their supporters back in England, who began pressuring the government to restrict blackbirding. The Society for the Propagation of the Gospel and other mission groups lobbied Prime Minister Gladstone (himself an Evangelical) who helped pass the Pacific Islanders Protection Bill (1872) which restricted the trade (Stocking 1995: 35-7; R. Tucker 1983: 220-24; Barrett, Kurian, and Johnson 2001: 797).

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<sup>57</sup> Because of the anger blackbirding caused among Melanesians against whites, Patteson always swam ashore to new islands by himself. He hoped this would demonstrate he was not a threat and had no means to transport unwilling Melanesians away from their homes.

Similarly in Kenya, European settlers pressured the government into issuing a circular in 1919 that urged government officials to “Exercise every possible lawful influence to induce able-bodied male natives to go into the labour field.” Africans were virtually compelled to work for two months each year for settlers or the government (Stanley 1990: 147-48). Missionaries began protesting and J. H. Oldham, Secretary of the International Missionary Counsel, organized a memorandum entitled “Labour in Africa and the Principles of Trusteeship” which he got approved by the Conference of British Missionary Societies and signed by a galaxy of others. The memorandum appealed to the British government to hold true to the ideal of trusteeship and not allow settler interests to dominate the interests of the indigenous people. As a result of this pressure, the British revoked the circular in 1921 (p. 149).

Although the Kenyan “forced” labor campaign was mild relative to French, Portuguese and Belgian examples, missionaries were able to remove it in only two years. Both these factors suggest a distinction between British colonies and their European rivals.

### *3) Reducing the Violence of Decolonization:*

The British generally had less violent decolonizations than other European colonizers (e.g., Tony Smith 1978; Strang 1992: 373, Chamberlain 1998: 150; Sundkler and Steed 2000: 686, 843, 984; Hastings 1974). Well after the British nonviolently gave up several key colonies, the French violently fought decolonization in Algeria, French Indo-China and Madagascar; the Belgians in Congo; the

Portuguese in Angola, Mozambique, and Guinea-Bissau. The Portuguese continued fighting in order to hold on to their colonies in Africa and Asia even after the British, French, Belgians and Dutch had giving up all of their colonies in Africa and Asia.

Comparative historian Tony Smith (1978) attributes the British willingness to give up power to the experience with the American Revolution – which made the British accustomed to losing colonies – and to the power of French settlers in colonies like Algeria and Indo-China. However, the violent suppression of the “Indian Mutiny,” of Irish nationalist movements, and of various uprisings – such as the Governor Eyre Affair – and the concentration camps and scorched earth policies of the British military during the Boer Wars suggest that through the beginning of the 20<sup>th</sup> century, the British had not internalized the lessons of nonviolent decolonization – especially for their non-settler colonies (e.g., Ferguson 2002: 146-54, 191-203, 277-82).

Unwillingness to use mass violence to maintain colonial rule was a late development, not an early one. The British had to be trained by paying political consequences in England for abuses in the colonies. The recall and murder trial of Governor Eyre and the defeat of the Tories in the election following the revelation of the massive abuses of Boer civilians during the Boer Wars helped train them.

Moreover, the size of the settler population does not seem to be crucial in comparative perspective. The British had large, powerful settler populations in Kenya, and many Caribbean islands, but they still had relatively nonviolent decolonization. Settlers in Zimbabwe/Rhodesia and South Africa violently resisted loosing control to blacks, but the British did not send in their military to support

them. Conversely, the Portuguese had few settlers in Mozambique, Angola and Guinea Bissau, but violently resisted decolonization. The Belgians had few settlers in the Congo/Zaire, but had a violent decolonization. The Dutch had few settlers in Indonesia, but violently resisted decolonization there.

White settlers often encouraged violent resistance to transferring power to non-whites, and the size of the white settle population may partially explain which French colonies the French used violence to try to keep. However, when we compare between multiple colonizers, the size of the white settler population does not seem to be the crucial factor in determining whether colonial governments used violence to resist decolonization. The French, Belgians, Dutch, and Portuguese did not have more white settlers per capita than the British.<sup>58</sup> As I argue in the rest of this chapter, one factor may have been the ability of non-state-supported missionaries to mobilize political pressure in England which limited the political lobby of settlers. Another was the diverse civil society that developed both through and in response to Protestant missionary activity. This civil society gave British decolonization movements a distinct character.

#### *4) Speeding the Devolution of Power to Indigenous Institutions:*

Most commentators agree that until quite late, the British were not trying to prepare their non-settler colonies for independence; they were trying to stay in power (e.g., Tony Smith 1978: 73; Ferguson 2002; Strang 1992: 374). However, as part of their strategy to maintain control of their colonies, the British devolved power

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<sup>58</sup> I don't mention the Spanish or Italians, because they had little choice about how to decolonize. Most Spanish colonies became independent when the French invaded Spain. The U.S. took away most of the rest of them in the Spanish American War (1898). The Italians lost their colonies in World War II.

gradually to indigenous institutions and allowed inchoate political parties to develop in ways that other colonizers did not (e.g., Strang 1992; Tony Smith 1978).<sup>59</sup> This gradual devolution had the unintended consequence of preparing people for independence and democracy. Gradual devolution also fostered the postcolonial stability of political institutions (Tony Smith 1978: 75; Lipset 1994; Treisman 2000: 440). Abrupt decolonization caused political instability, which hampered stable democratic governance (*ibid.*; Dahl 1971 33-47; R. Collier 1982: 29-62).

The sociologist David Strang (1992) argues that the British emphasis on “popular sovereignty” and “the traditional localism of the British state” made the British more willing to accommodate local demands (p. 380). However, he admits that “[the French were] more fully organized around popular sovereignty than Great Britain.” Yet, the French began devolving power to local institutions long after the British (*ibid.*). This leaves only the “tradition of localism” to explain the difference in French and British behavior. However, the British tradition of indirect rule was often used to exploit indigenous peoples (Comaroff and Comaroff 1997: 366-67). Strang’s explanation neglects the role of power and institutions in shaping where and when colonial governments applied particular beliefs. Democracies and other governments often have stated beliefs that they do not apply to subjugated peoples when they are not forced to – see the previous section on the undemocratic behavior of democracies.

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<sup>59</sup> This does not mean that the British consistently had elections prior to French colonies. At least in Africa, the French often had universal-suffrage elections earlier – although in Africa, most elections were very close to independence (R. Collier 1982: 29-62).



Adding a focus on the divisions between colonial elites in British colonies helps mitigate this problem. Missionaries influenced the British governments' decision to gradually devolve power in at least four ways. First, missionaries spread the ideal of "trusteeship" – that the only justification for colonizing another society was to educate it for eventual self-rule – and missionaries helped create a power base that kept colonial officials partially-accountable to that standard (e.g., Ferguson 2002: 116-22; WMC 1910d 115-21, 142-43; Booth 1897). However, because I have already discussed trusteeship previously, I will not repeat the evidence in this section.

Second, missionaries restrained the British government's ability to use violence. As I discussed earlier in this dissertation, missionaries often reacted strongly when colonial officials responded violently to indigenous movements – as, for example, when Governor Eyre brutally suppressed the uprising at Morant Bay in Jamaica in 1865 (Russell 1993; Heumann 1994). This kind of political pressure constrained the options of colonial elites. Each time a group pressured the colonial state, they had to decide whether to respond violently or concede some power. Monitoring by missionaries groups (among others) made the violent option more politically risky and thus less viable. Political and military leaders had to at least justify their actions with the rhetoric of trusteeship. This political constraint made it easier to gradually make concessions to indigenous interests, such as granting concessions to Mahatma Gandhi and his supporters rather than killing them – as Hitler suggested to the British Foreign Secretary in 1937 (Ferguson 2002: 329-30).

Thus, for example, in 1919 when Brigadier General Rex Dyer suppressed a strike and unauthorized assembly in Amritsar by killing 379 unarmed demonstrators and

wounding more than 1,500 others, the moral justification for ruling India was deeply shaken in Great Britain. “In previous centuries the British had felt no qualms about shooting to kill in defense of the Empire. That had started to change after Morant Bay [i.e., the Governor Eyre prosecution]. By the time of Amritsar, the ruthless determination once exhibited by the likes of Clive, Nicholson and Kitchener seemed to have vanished altogether” (Ferguson 2002: 328). The French, Belgians and Portuguese – two of which were democracies – did not go through similar soul searching when they used far greater violence much later in the 20<sup>th</sup> century (e.g., Tony Smith 1978: 84; Strang 1992: 373, Chamberlain 1998: 150; Sundkler and Steed 2000: 686, 843, 984; Hastings 1974).<sup>60</sup>

Third, when missionaries had influence with nationalist movements, they encouraged nationalists to use nonviolent, legal means (e.g., Stanley 1990: 151; Mathew 1988; Robert 2002; Oddie 1968; Langworthy 1996).<sup>61</sup> Non-violent protest gave the British government fewer excuses to use violence in return (e.g., Tony Smith 1978: 96). Moreover, missionary pressure campaigns gave historic examples of nonviolent political challenges that had worked and missionary-spurred civil society and vernacular printing gave nationalists the means to nonviolently resist colonialism.

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<sup>60</sup> Of course by the 20<sup>th</sup> century some of the most radically critics of colonial policy were Theosophists and other liberal intellectual elites. In fact, an Irish Theosophist named Annie Besant was elected head of the Indian National Congress Party in 1918 and helped found the Banaris Hindu University. Other European Theosophists wrote a Buddhist catechism which is still used by Sri Lankan Buddhist nationalists to this day (van der Veer 2001; Ferguson 2002: 328; Verter 1998). These elites were extremely hostile to missions and viewed them as part and parcel of colonial abuse. However, if these small intellectual elites were powerful enough to alter colonial policy on their own, we must explain why similarly radical and anti-missionary elites in France and Belgium did not similarly modify French and Belgian colonial policy.

<sup>61</sup> Similarly, see Grayson (2002: 160-61) on nonviolent protests to Korean occupation, Garrard-Burnett (1998: 83-84) on missionaries and union organization in Guatemala; and Yates (1994: 74-75), Tinker (1979), and Frykenberg (1999) and Oddie (1968) on missionary cooperation with Gandhi and other nonviolent Indian nationalists.

Finally, non-state religious groups helped create civil society that allowed indigenous people to organize consistent, nonviolent pressure on the colonial state (e.g., van der Veer 2001: 14-54; Deol 2000). Thus, indigenous people were able to force the British to gradually devolve power to indigenous institutions.

In this analysis, I focus on India, because it was the first non-white colony to wrest independence from the British – and it did so largely through non-violent civil protest. India was considered the crown jewel of the British Empire and once the British gave India her independence in 1947, the expectations of other nationalist elites increased (Ferguson 2002). When the British gave Ghana independence in 1957 – the first black African state to receive independence – it created even more pressure to grant other colonies home rule. Pressure grew so rapidly and spread beyond British colonies, that British, French, Belgian and Dutch colonies obtained independence much faster than either colonizers or missionaries expected (e.g., Sundkler and Steed 2000: 620, 901-3; Chipembere 2002: 25-26). Thus, although civil society may not have been as developed in many other British colonies, India provided the example of non-violent British decolonization that shaped the process in other British colonies.

*The Rise of Civil Society and Decolonization in India:* Shortly after entering India, Protestant missionaries began mobilizing pressure for a series of social reforms. They pressured the British East India Company and later the British colonial government to end *sati* (burning widows on the pyre of their dead husbands), to raise the age for consummation of marriage to 12, to ban female

infanticide, to change rules of land tenure, to allow “untouchables” to use public roads and wells and wear clothing that covered their breasts, etc (Ali 1965; Oddie 1969; 1978; 1996b; 1999; Ingham 1956; Zavos 2000). They also worked diligently to convert people – and had some successes among prominent children of the elite and more among low-caste Hindus.

Both conversions and social reform activities stirred major reactions from Indian elites.<sup>62</sup> In response Hindus and Muslims formed a series of organizations to prevent conversions and mobilize for or against mission initiated social reforms (e.g. Zavos 2000: 38; Ali 1965; Oddie 1969; Ingham 1956; Kooiman 1996: 159). These organizations include Brama Samaj (initially organized in 1828, and reorganized in 1840s), Calcutta Dharma Sabha (organized in 1831), Madras Native Association (1852), The Society for the Promotion of National Feeling Among the Educated Natives of Bengal (1861), Prarthana Samaj (1867), Arya Samaj (1875), and the Ramakrishna Mission (1897). Some of these groups supported mission initiated social reforms, others fought them, some tried to “modernize” Hinduism, some to return to a “pure, original form of Hinduism” – but they all actively fought conversion to Christianity and explicitly stated this as one of their goals (Ingleby 2000: 282; Prasad 1999: 135; Ali 1965; Zavos 2000: 38-9, 44; Das 1999: 19, 37, 49, 174; Deol 2000: 19-20; Kooiman 1996: 159).

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<sup>62</sup> The most virulent reaction was to the 1891 bill outlawing the consummation of marriage before age 12. At the time, Indians widely considered it a public insult to ancient Hindu tradition, a license for sexual laxity among women, and a deliberate attempt by the British to emasculate Indian men. It created such a widespread and violent reaction that it was never truly implemented. The vernacular press used the incident to emphasize the sexual laxity of Europeans, raise resentment over of rape and use of prostitutes by British soldiers, and point out the hypocrisy the British concern for private marital behavior while ignoring abuses of Indian indentured labor, etc. The incident gave a major boost to Indian nationalism (Chaudhuri 1993: 68-74; van der Veer 2001: 89, 96-7; Oddie 1978).

These organizations were unprecedented in Indian history (Anheier and Salamon 1998: 14-15). They mirrored the organization forms of missionary organizations – many even had boards of directors and constitutions, followed strict rules of parliamentary procedure, and had cross-regional hierarchical organizational structures, and so on (e.g., Zavos 2000: 44; Deol 2000: 70). These organizations copied the tactics of missionaries – submitting petitions and memorials to the government, using widespread vernacular printing, setting up reading rooms, hiring professional traveling evangelists and spokespeople, and setting up weekly discussion and teaching meetings (e.g., Deol 2000: 19-23, 68-73; Zavos 2000: 44; Oddie 1978: 42-40). These organizations focused on many of the same social issues as missionaries – but attempted to justify their positions within their own religious tradition (Oddie 1978: 7, 52; Zavos 2000: 47; Das 1999: 96-7; Ingham 1956). They reformed Hinduism in line with missionary criticism, but claimed to be returning to the pure, original form of Hinduism (Deol 2000: 21- 25, 68-70; van der Veer 2001).<sup>63</sup>

The leaders of these movements were primarily from the Western educated elite – often trained in missionary schools – and a number had close contact with missionaries (e.g., Oddie 1969; 1978: 3; Zavos 2000: 44; Deol 2000: 19-20; 70,

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<sup>63</sup> These changes include – removing regional variation to create a national Hindu tradition, removing polytheism and idolatry and claiming the Hinduism was originally a monotheistic or monistic tradition, claiming authority for Hinduism in an Ur-text (the Vedas and/or Upanishads), minimizing emphasis on caste, creating programs for social uplift of the poor and redefining the status of women (for example, allowing high-caste married women out of seclusion, allowing female education, allowing remarriage of widows and condemning female infanticide). They also developed counter attacks against Christianity. Many began to proclaim the superiority of the “spiritual East” over the “materialist West”. Many began to emphasize the tolerance of Hinduism and that all religions are ultimately one. At the same time they developed their own missionary forces and developed rituals to integrate new believers and reintegrate those who had left Hinduism to become Christians (Deol 2000: 21, 24, 68, 70; van der Veer 2001; Kooiman 1996: 159).

85-6; Ingham 1956, van der Veer 2001; 7, 44; Tinker 1979; Frykenberg 1999: 183-4).

These groups were not originally anti-colonial – they were anti-missionary – or at least anti-conversionist. In fact, a number of early leaders openly stated that India needed a time of tutelage under the British to modernize India and remove the superstitious accretions of Hinduism before they would be ready for independence (e.g., Das 1999: 86, 166). Because they were anti-missionary and not anti-colonial, the British government – which advocated religious liberty – allowed them to flourish (e.g., Zavos 2000: 35-8; Das 1999: 61-2, 166). Many colonial officials viewed missionaries as a nuisance anyways.

However, over time the organizations developed skilled and identifiable leaders, national and cross-regional organizations, resources, publications with broad circulations, and broad networks of followers. Thus when they became more anti-colonial, they were harder for the British to crush. Leaders from these organizations were central in leading anti-colonial movements and in forming the Indian National Congress Party and the R.S.S. – political parties that were central to resisting colonial rule (e.g., Das 1999: 18, 37, 39, 196; Deol 2000: 68; Anheier and Salamon 1998: 38). They mobilized what became the first national protest movements that helped to galvanize Hindu and Muslim nationalism – such as the Hindu movement for the Protection of Mother Cow against British and Muslim butchers (Deol 2000). Neo-Hindu leaders – such as Vivekananda, Sri Aurobindo,

Swami Dayananda Saraswati, and Mahatma Gandhi – also provided the ideology of Hindu nationalism (van der Veer 2001; Das 1999).<sup>64</sup>

Thus, Protestant missionary activism provided the initial motivation, organizational structures, and tactics of modern Indian organizational civil society. Mission-initiated religious liberty allowed these organizations to flourish until they were large and powerful. Therefore, when nationalists later mobilized these organizations to pressure for colonial reforms, the British were forced to either give concessions or use extreme violence. Monitoring by Christian missionaries and some other liberal elites (such as Theosophists), made the violent option risky for colonial officials. Thus, it became politically necessary to gradually devolve power to indigenous institutions. Colonizers that kept tighter control on religious organizations never had to deal with the same level of organized, non-violent pressure – thus these other colonizers were not forced to devolve power until much later regardless of their ideology towards “popular sovereignty.”

In addition, this religious civil society created the foundation for political parties. Consequently, at the time of independence political parties were already in place. The British could often transfer power to the leaders of stable national organizations like the Indian National Congress Party. They were not forced to give over power to revolutionary military leaders and they had difficulty giving

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<sup>64</sup> Indian Christians were initially disproportionately involved in supporting the Indian National Congress. For the first decade, substantially more Indian Christians were delegates at Congress meetings than the percentage of Christians in the general population. Missionaries encouraged Indian Christians to participate and even celebrated the disproportionate Christian presence in missionary publications (e.g., *Harvest Field*, Feb. 1888, Vol. VIII, p. 278; Datta 1908: 259). Some missionaries even attended Congress meetings. However, as nationalist rhetoric became more Hindu-based and Indian Christians began to fear the consequences of Hindu domination after independence, Indian Christian participation in the National Congress declined (Oddie 1968).

power to members of a small colonial elite with little grass-roots support – like the French, Belgians, Dutch and Portuguese were often forced to or able to do (Tony Smith 1978; Chamberlain 1998; Sundkler and Steed 2000: 686, 843, 984; Steinberg 1987).

*Missions and the Rise of Civil Society outside India:* Although in the previous section I focused on India, the same pattern of organizational civil society developing in response to Protestant missionary activism is clear in many other British colonies and other societies not colonized by European powers – i.e., Sri Lanka (James 1989b); Egypt (Sharkey 2003); Palestine (Kark 1999; 2000); Korea (Kang 1997; Grayson 2002: 189-91, 215; Kim 2003); China (Dunch 2001; Welch 1968; Yang and Ebaugh 2001: 283); and Japan (Drummond 1971; James 1989c; Hane 1982: 108, 117, 196, 213, 242). These new organizations repeatedly copied the organizational forms and tactics of missionary organizations. They often even copied the names of missionary sponsored organizations. For example, the Young Men's Christian Association (YMCA) spurred the Young Men's Muslim Association, the Choson Buddhist Young People's Association, and so on (Sharkey 2003: 12; Grayson 2002: 191).

Missions were important even in societies with religious traditions that were not effective in organizing competing formal institutions – such as African indigenous religions (Salamon and Anheier 1997; Anheier and Salamon 1998: 11-17). In these cases Christian organizations often provided the infrastructure for nationalist movements. For example, in some African countries nationalist



movements were spread by African teachers at missionary schools (Sundkler and Steed 2000: 902).

In fact the association between 19<sup>th</sup> century missionary activity and the rise of organizational civil society is so pervasive that NGO scholar Estelle James writes: “[this] suggests that a similar institutional form may not exist in economies that do not have a colonial missionary background...” (James 1989b: 291). In the rest of her analyses, James politely focuses on religious competition as the central causal factor (James 1989a; 1989b; 1989c; 1993).<sup>65</sup> But competition is not a sufficient explanation. Even if we limit our focus to India: Catholic missionaries were active in India for centuries before Protestant missionaries were, but did not spur an explosion of voluntary organizations. Religious competition between Muslims, Christians, Hindus, Jains, Sikhs, and various sects of Buddhism had gone on for millennia in India, the Middle East, China, Japan, and elsewhere (Hastings 1999; Jenkins 2002; Covell 1986). Yet, this religious competition did not spur the development of widespread voluntary humanitarian and social reform organizations.

These organizations did not develop until religious traditions competed with non-state Protestant missionaries. Non-state Protestants combined a lay-lead, modular, voluntary organization with conversionism and a desire to transform society. They were also the main advocates of religious liberty, which created the political opportunity for voluntary organizations to flourish.

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<sup>65</sup> Estelle James weights her religious competition measure to accentuate the impact of Christian groups. She argues Christian groups were more “missionary” and thus did more to spur religious competition (James 1993: 579).

In the US, Michael Young (2002) argues that modern social movement organizations and tactics developed when the lay-focused revivalist movements of upstart sects like Methodists and Baptists linked up with cross-national organizations developed by Calvinists to promote missions and orthodoxy (also see Rogers 1996; McCarthy 1999). My research suggests that Protestant missionaries rapidly spread these organizational forms and tactics to the colonies. Thus we see similar social movements develop in England, the United States and India in the 1820s and 30s – i.e., at the same time. Traditional state-centered or economic-centered theories of the rise of social movement organizations do not explain this well (e.g., Tilly 1986; 1995; Tarrow 1993; 1994). It is hard to argue that economic and political conditions were comparable in London, the western frontier of the United States, and the territories under the control of the British East India Company in the early 1800s. What these diverse areas did have in common was active, non-state-sponsored, conversionist, Protestant groups.

Moreover, in every society I have found evidence, Christian groups – especially non-state Protestant groups – are more active than other religious groups in forming and supporting non-profit organizations (James 1989b: 295; 1989c: 64, 71; Anheier 1989; Seligson and Jutkowitz 1994; Verba, Schlozman and Brady 1995; Salamon and Anheier 1997: 6-7; Anheier and Salamon 1998: 13-15; Pongsapich 1998; McCarthy 1999; Curtis, Baer and Grabb 2001; Lam 2002: 415; Ecklund and Park 2003; Kim 2003: 161-63).

In West Africa, India, Sri Lanka, Thailand, and Japan, Christian non-governmental organizations (NGOs) make up a large proportion of NGOs – much

larger than the proportion of the population that is Christian (*ibid.*).<sup>66</sup> Similarly, in Japan religious groups created about a third of private educational institutions, the vast majority of these were created by Christian groups – although Christians make up about one percent of the population (James 1989c).<sup>67</sup>

Moreover, Christian NGOs are, on average, more likely to be involved in humanitarian work and social reform than other religious NGOs (Anheier and Salamon 1998: 16). For example, the vast majority of Buddhist NGOs in Thailand are cremation societies (Salamon and Anheier 1997: 11; Anheier and Salamon 1998; Pongsapich 1998). Even in the U.S., Asian-American Christians are more likely to volunteer for non-religious voluntary organizations than either non-religious Asian-Americans or Asian-American adherents of non-Christian religious traditions (Ecklund and Park 2003).

Non-state-sponsored, conversionist, Protestant groups seem to have been central to developing modern social movement organizational forms and tactics and to initially fostering mass participation in voluntary organizations (Young 2002; McCarthy 1999; Rogers 1996; Carwardine 1993; Timothy Smith 1957; Hammond 1974; 1979; Woodberry 1996b). Protestant missionaries seem to have been central to spreading these organizational forms and tactics to the colonies and spurring other religious groups to form similar organizations. Moreover,

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<sup>66</sup> These authors did not count strictly religious groups – such as churches, temples, and evangelistic groups – as NGOs.

<sup>67</sup> Some of this may have to do with external funding from the West. However, Muslim and Buddhist groups should have sufficient funds to maintain NGOs given the vast oil wealth of many Muslim societies, the developed economy of Japan and the moderately developed economy of Thailand. Moreover, within the West, Christians, and especially Protestants, are disproportionately involved in both religious and non-religious voluntary organizations (Verba, Schlozman and Brady 1995; McCarthy 1999; Curtis, Baer and Grabb 2001; Lam 2002; Ecklund and Park 2003). Thus a financial explanation probably does not explain everything.

Christians – especially non-state-supported Protestants – continue to be disproportionately involved in forming and supporting these organizations in every society for which we have data (James 1989b: 295; 1989c: 64, 71; Anheier 1989; Seligson and Jutkowitz 1994; Salamon and Anheier 1997: 6-7; Anheier and Salamon 1998: 13-15; Pongsapich 1998; Smidt 2003; Verba, Schlozman and Brady 1995; Curtis, Baer and Grabb 2001; Lam 2002 : 415; Kim 2003; Ecklund and Park 2003). Thus, we would expect more of these voluntary organizations where Protestant missionaries had more influence and converted more people. Available evidence supports this theory.

In India these mission-spurred organizations were central in shaping the process of decolonization, forming political parties, and fostering post-colonial civil society. These mission-spurred organizations presumably had a similar influence other places as well.

*How Moderating Colonial Abuses and Expanding Civil Society Fostered Post-Colonial Democracy:*

In the previous sections I argued that because missionaries had more independence from state control in British colonies, they were better able to moderate colonial abuses. Among other things, they helped restrict abusive and corrupt colonial officials, pressured the British to expand the court system and apply the same laws to people of all races and economic positions, mobilized a social movement that ended slavery earlier than in other colonies, moderated forced labor campaigns, restrained the government's ability to use violence, and helped expand civil society. These reforms may have had important

implications for post-colonial democratization. However, quantifying an exact link is difficult, thus the following arguments should be viewed as suggestive, rather than definitive.

*1) Economic Development:* An early end to slavery and forced labor presumably helped develop the local economy and increase the relative size of the middle class. Voluntary labor increased resource transfers to indigenous peoples and allowed indigenous planters to compete with European planters (Manning 1998: 116). Workers had to be enticed by higher pay and better working conditions rather than “rewarded” by not killing them, not raping their female relatives, or not burning their villages. Abuses and dislocation occurred under the wage labor systems in places like South Africa and Rhodesia, but these abuses pale in comparison to what happened in Portuguese Angola and Mozambique, Belgian Congo, and French Equatorial Africa (e.g., see Hochschild 1998: 280-83).

*2) Minimizing Revolutions:* Removing forced labor encouraged patterns of less violent, less arbitrary rule and presumably also instilled trust that the British could be swayed by legal and political pressure. This may have reduced incentives for nationalists to use violence – although it did not eliminate these incentives.

When decolonization was violent it often left leaders of revolutionary armies in power rather than leaders of political parties. I assume it is harder for heads of political parties to consolidate stable dictatorial powers because they do not have an armed force directly under their personal control. They must convince the armed

forces to support them after the fact. I assume this makes dictatorial regimes more unstable and made the transition to a full Marxist-Leninist state more difficult.

*3) Providing Models for Governance:* Previous scholars suggest that postcolonial elites often copied the governance styles and institutions of their colonizers (e.g., Ntiri 1993; Acemoglu, Johnson, and Robinson 2002). These scholars mostly focus on undemocratic traditions, but democratic and legal traditions might spread as well. To the extent that colonialism was violent and arbitrary, this seems likely to hamper postcolonial democratization. Violent and arbitrary colonial rule seems likely to destroy trust of government and other people, hamper long-term financial investment, encourage political corruption, and accustom people to violent, arbitrary rule. This can undermine legitimacy and social trust; both of which have long-term consequences for economic development and political democracy (Lipset 1994; Dogan 1988; Banfield 1958; Putnam 1993).

Empirical research suggests a consistent link between British colonialism and “quality of government,” and “perceived level of government corruption,” (La Porta *et al.* 1999; Treisman 2000). The percent Protestant in a society is also consistently associated with these outcomes (La Porta *et al.* 1999; Treisman 2000; Lipset and Lenz 2000; Paldam 2001; Sandholtz and Koetzle 2000; Nieuwbeerta, Geest, and Siegers 2003). Both these results remain significant even when the current level of democracy, historic experience of democracy, and other factors are statistically controlled.

Corruption has consequences. Statistical research shows a significant negative association between higher perceived corruption and democracy (Treisman 2000), although the causation may be bi-directional. It also shows a significant negative association between corruption and both investment and later economic growth (Mauro 1995; World Bank 1997) and a significant positive association between rule of law and later economic growth (Keefer and Knack 1997; Kaufmann et al. 1999). To the extent that monitoring by religious groups reduced colonial corruption, reduced the use of violence by colonial governments, and increased the rule of law, these patterns may have long-term consequences for postcolonial economic development and democracy.

*4) Reducing Distinctions Between Elites and Non-elites:* By bringing cases to court on behalf of marginalized groups, resisting the power of large land owners, and pressuring the British government to expand the police and court system into rural areas, missionaries increased the power of marginalized groups relative to elites and expanded the rule of law (Oddie 1969; 1978; 1999; Russell 1993). Missionary education and transfers of technology also allowed marginal groups to increase their social and economic status (e.g. Oddie 1969; 1978; Dunch 2001; Sundkler and Steed 2000; Ingleby 2000; Blouet 1990). To the extent these patterns continued after decolonization, they could foster democratization.

*5) Increasing Civil Society:* A number of recent scholars have argued that civil society is important for democratization. These scholars argue it instills societal

trust and gives people the institutional resources they need to make consistent moderate pressure on the government. Moreover, because organizations are diverse, robust civil society prevents any one group from dominating (Putnam 1993; Fukuyama 1995; Seligman 1992; Verba, Schlozman and Brady 1995, Hadenius and Ugglå 1996; Smidt 2003; de Tocqueville 1848).

As I argued previously, religious liberty, Protestant missionary social reform activity, and counter mobilization by other religious groups fostered organizational civil society in British colonies. Although little comparative data on the non-profit sectors in nonwestern societies exists, the data that does exist suggests that former British colonies continue to have more vital non-profit sectors than other nonwestern societies (Anheier and Salamon 1998: 356).

Moreover, statistical evidence consistently suggests that both in the West and non-West, Christians – and particularly Protestants – are disproportionately involved in forming and supporting voluntary organizations – especially those focused on humanitarian work, education, and social reform (James 1989b: 295; 1989c: 64, 71; Anheier 1989; Seligson and Jutkowitz 1994; Salamon and Anheier 1997: 6-7; Anheier and Salamon 1998: 13-15; Pongsapich 1998; Smidt 2003; Verba, Schlozman and Brady 1995; Curtis, Baer and Grabb 2001; Lam 2002: 415; Kim 2003; Ecklund and Park 2003). The one study I have found that focuses on the impact of missionary activity on modern nonprofit organizations suggests that within nonwestern societies, areas where missionaries were more active continue to have more nonprofit organizations (James 1989c). Thus, to the extent that organizational civil society fosters democracy – especially organizations that have a



social reform component – we would expect more democracy in British colonies, areas where non-state Protestant missionaries had more influence, and in areas where more people converted to Christianity.

Summary:

In this chapter I argued that non-state-supported missionaries were central to moderating colonial abuses. Missionaries were in a unique bridging position between colonizing and colonized societies. Colonized peoples had no power base in the colonizing state and colonial officials, businesspeople, and settlers had no incentive to expose their own abuses. However, missionaries had both a power base in the colonizing state and people directly exposed to abuses in the colonies. Moreover, missionaries had incentive to fight colonial abuses because these abuses often created resentment against the West and thus made conversions harder. Missionaries sometimes ignored abuses when colonial officials and businesspeople could bar missionaries' access to potential converts. But when officials and businesspeople did not have this power – as in British colonies after 1813 – missionaries were often central to exposing and fighting abuses.

To illustrate the impact of missionaries, I described a number of missionary initiated reforms of British colonialism. Among other things, missionaries promoted the ideology of “trusteeship,” they spurred the movement for the immediate abolition of slavery, they helped form the Aborigines Protection Society to monitor colonial abuses, they pressured the government to apply the same legal standards to whites and nonwhites, they initiated land reform in India, and they attempted to punish colonial officials who used excessive violence against indigenous peoples and former slaves.

Because missionaries were more independent from state control in British colonies than in other European colonies, missionaries were more effective at moderating British colonialism than other forms of European colonialism. For example, because of pressure by missionaries and their supporters, the British banned slavery earlier than other colonizers and put more effort into ameliorating the conditions of former slaves. The British used less violent forms of forced labor and outlawed it earlier than other European colonizers. The British had less violent decolonizations, and the British more gradually devolved power to indigenous institutions.

Missionaries were also central to the development of civil society in the colonies. Not only did Christian missionaries create non-governmental organizations, other religious groups created similar organizations to fight Christian missionary activity. Because of the greater religious liberty in British colonies, these organizations flourished more in British colonies than elsewhere. Later, nationalists used these religious organizations to resist colonialism and help form inchoate political parties. Thus, because these organizations were more prevalent in British colonies, indigenous elites were better able to force gradual concessions in British colonies, than in other European colonies.

Missionary initiated moderation of colonial abuses and expansion of colonial civil society may have had a number of consequences for post-colonial democracy. It presumably increased economic development, by increasing economic competition and transfers of resources to the colonies. It may have minimized revolutions, making the consolidation of Marxist-Leninist states more difficult.

Missionary initiated pressure also forced the British to use less arbitrary, more rule-based forms of governance, to use less violence, and to minimize political corruption. To the

extent these patterns of governance influenced the political culture of post-colonial elites, this may have also fostered more rule-based, less violent, and less corrupt forms of post-colonial governance. Missionary initiated reforms reduced distinctions between elites and non-elites. This may have forced post-colonial elites to integrate more groups into any ruling coalition, thus creating pressure for more rule-based forms of governance.

Finally, missionary organizational forms, social activism, and conversion activities fostered organizational civil society in the colonies both directly and through the reactions they caused in other religious groups. Missionary initiated religious liberty in British colonies allowed these organizations to flourish until they were powerful enough to pressure the colonial state. To the extent that this civil society facilitated gradual, nonviolent decolonization and spurred post-colonial civil society, it may have fostered post-colonial democracy.

In chapter 5 I measure the impact of colonial missionary activity on post-colonial democracy in a series of statistical analyses. Some of the influences I described in chapter 4 are difficult to measure with currently available data. Thus, the following regressions should be viewed as a conservative estimate of the impact missionary activity had. However, missionary activity still seems to have an important and consistent impact of levels of post-colonial democracy and to minimize the positive impact of British colonialism on democracy. In fact, historic missionary activity predicts later democracy more consistently than any other factor.

## CHAPTER 5

### QUANTITATIVE ANALYSIS OF THE IMPACT OF MISSIONS AND COLONIALISM ON POST-COLONIAL DEMOCRACY

In the previous chapters I used historical evidence and theoretical arguments to discuss the relationships between missions, British colonialism, and democracy. In this chapter I use statistical analysis to test these relationships. Non-state-supported Protestant missionaries initiated religious liberty, expanded Western formal education, moderated colonial abuses, fostered the expansion of civil society, and influenced the process of decolonization in British colonies in ways they were not able to in other European colonies. In turn, these factors influenced the economic development, class structure, political culture, and political opportunity structures in post-colonial societies in ways that fostered post-colonial democracy.

Although I cannot measure all these causal mechanisms directly, I can measure historic missionary activity and test if this is associated with post-colonial democracy. If the missions variables are strong and statistically significant after I control for alternative explanations and other factors associated with democracy, this would strengthen the theoretical and historical analysis in the previous chapters. I also test to see if controlling for missionary activity removes or diminishes the positive impact of British colonialism on democracy. If it does, this is consistent with the theory that prevalence and independence of Protestant missions in British colonies is what made them distinct.

Variables:

Past research suggests that island nations, former British colonies, more economically developed societies, and societies with more education are generally more democratic, while conversely, societies with more Muslims are less democratic (e.g. Bollen and Jackman 1985a; 1985b; Hadenius 1992; Faris 1999; Kamens 1988). Thus, to test my theories, I used the following variables. I discuss them in the order I entered them into the regressions.

*Democracy Variable:*

To measure political democracy, I used data from 1950 – 1985 compiled by Kenneth Bollen (2001) and extended from 1986 - 1994 by Pamela Paxton (2002).<sup>68</sup> Bollen constructed this measure to minimize systematic bias and error in other indicators of political democracy. Bollen (1993) used data from Banks (1971; 1979), Gastil (1986; 1988) and Sussman (1980; 1981; 1982) to construct latent indicators of “political liberties” and “democratic rule.” He then demonstrated that the democracy indicators constructed by these different authors systematically favored different types of countries. However, he found that by creating an equally weighted sum of Bank’s political opposition variable, Gastil’s political rights measure, and Bank’s legislative effectiveness variable,<sup>69</sup> he was able to minimize systematic bias and predict the latent indicators of “political liberties” and “democratic rule” with little error (R-squared = 0.956). This research suggests that Bollen’s indicator of democracy is the least problematic measure of political democracy currently available. Bollen and Paxton then used later data from these same sources to update the democracy

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<sup>68</sup> Pam Paxton kindly allowed me to use the data she used for this article; the article does not provide the data.

<sup>69</sup> The “legislative effectiveness” variable is actually the product of Bank’s “selection process for legislative body” and “effectiveness of elected legislature” variables (Bollen 1993: 1215).

measure through 1994. To avoid confusing the reader with too many tables, I took the mean of the democracy scores for each country from 1950, 1955, 1960, 1965, 1975, 1980, 1985, 1990, and 1994 and used this for my dependent variable.<sup>70</sup>

Taking the mean democracy score creates two issues. First, some countries became independent earlier than others and thus have more years of democracy data. In case the year democracy data became available is systematically related to the countries democracy score, I created a statistical control for the year each country first has democracy data. This variable is labeled “*Year of First Democracy Data*” and located at the bottom of each table to prevent it from distracting from more substantively interesting variables.

Second, the method of measuring democracy changed over the time period. From 1950 through 1965 Bollen used one method of calculating democracy and from 1975 to 1994 he used a slightly different method. In case changing the method influenced democracy scores, I also added a dummy variable for countries with only post 1975 data. This variable is labeled “*Only Post-1975 Democracy Data*” and is also located at the bottom of each table.

#### *Colonizer Variables:*

To code the colonial history of every country in the world, I read the history of each country in five different sources: the *Columbia Gazetteer* (Cohen 1998), *Merriam-Webster’s Geographical Dictionary* (1997), the *Encyclopaedia Britannica* (2002), the *World Christian Encyclopedia* (Barret, Kurian, and Johnson 2001), and the *World Book Encyclopedia* (2001).

In every year from 1500 to 2000 A.D., I coded which country controlled each region associated with each modern country.<sup>71</sup> I ignored switches of control that lasted less than one

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<sup>70</sup> Democracy data for 1970 are not available from Bollen (2001) or Paxton (2002).

year. Because of the many sources I used, I am confident I found all long-term switches in control of colonial areas and virtually all brief switches of control. I defined the beginning of colonization as the date a colonizer established political control – not the date they claimed a region. I generally identified the establishment of political control with the first “stable” colonial settlement – planting a flag on a beach was not a sufficient influence. If Europeans did not establish the personnel and infrastructure to control a region, I did not count it as colonization. For a more detailed description of the procedures for coding this variable see the *Appendix Three: Description of Data and Variable Construction*. This detailed coding allowed me to measure the impact of multiple colonizers.

*Three Alternative Measures of Colonization:* Determining “the” colonizer for many countries was also problematic because areas often switched between different colonizers. Thus, I coded up the colonizer variable in three different ways: “log years colonized by each colonizer,” “last colonizer,” and “primary colonizer.”

“*Log Years of Colonization*”: I coded the exact years of the start of colonization, the end of colonization, and of each transition between colonizers. This allowed me to add up the years each country was colonized by each colonial power. For example, a particular society might have been colonized 50 years by the Spanish, 75 years by the French and 150 years by the British.

However, the marginal impact of colonization should diminish over time – i.e., the difference between societies colonized by the British for 25 years versus 35 years should be greater than the difference between societies colonized by the British for 225 years versus

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<sup>71</sup> This includes information on colonization by nonwestern societies. However, in this dissertation I only look at European colonization, therefore I will avoid a detailed discussion of these data and how I defined colonization by nonwestern societies.

235 years. Thus, I took the natural log of the years of colonization and used this variable in my analysis.

*“Last Colonizer”*: I defined this as the colonizer that controlled a country prior to its most recent period of independence. I required that this control lasted at least 5 years to prevent minor military incursions switching the coding of particular countries: for example, the U.S. invasion of Granada.

*“Primary Colonizer”*: I defined this as a weighted combination of years of colonization and recentness of colonization. If the most recent colonizer colonized an area for at least 65 years, I coded it as the “primary” colonizer. If the most recent colonizer colonized an area for less than 65 years *and* a previous colonizer had colonized the area for more than twice as long as the last colonizer, than I coded the previous colonizer as the “primary colonizer.” If there was more than one colonizer, but no colonizer controlled the “country” for more than twice as long as any other colonizer, I coded the last colonizer as the “primary colonizer.” Thus, for example, the British and French controlled much of the Middle East from World War I to shortly after World War II (about 30 years). The Ottomans controlled this area for hundreds of years before them. In this case, I coded the British and French as the “last colonizers,” but the Ottomans as the “primary colonizer.”

In the tables in this dissertation I show variables for *“British colonies,” “Other Protestant colonies,”* and *“Dutch colonies.”* However, I also tested variables for the different historically Catholic colonizers (France, Spain, Portugal, etc.), but found no statistically significant differences in democracy between them. Thus, I grouped historically Catholic colonies and nonwestern countries that were never colonized by Europeans as the reference category.



*British Colonies:* In the tables this variable identifies the countries where the British were the “primary colonizer” according to the criteria described above. To check the robustness of my results, I ran each analysis three times: once with each of the different “colonizer” variables. The “log years of colonization” should best capture the impact of cultural and institutional transfer. The longer a colony was colonized by a particular European power, the more the culture and institutions of that colonizer are likely to have shaped the colony. The “last colonizer” should best capture the impact of the way different colonizers transferred power to their colonies at independence and the type of institutions they put in place. “Primary colonizer” should capture a combination of culture, institutions, and means of transfer.

I use “primary colonizer” in the tables because in both univariate and multivariate analyses this variable seemed to have the strongest impact on democracy (as measured by R-squared and significance level). This stacks the deck against my theory that the prevalence of Protestant missionaries explains the positive association between British colonialism and democracy.

*Other Protestant Colonies:* This variable identifies the countries that had a “Protestant” “primary colonizer” other than the British or Dutch according to the criteria described in the section above. These “Protestant” colonizers are Australia, New Zealand, the U.S., and South Africa. These colonies I expect to be similar to British colonies (especially the colonies of

Australia, New Zealand, and the U.S.). In the colonies of the first three powers, missionaries had similar influence and freedom as they did in British colonies.<sup>72</sup>

*Dutch Colonies:* This variable identifies the countries where the Dutch were the “primary colonizer” according to the criteria described in the section on British colonialism. The Dutch were distinct from other “Protestant” colonizers in several ways. First, the Dutch had two state churches, one Protestant and one Catholic. Second, although Protestant missionaries entered Dutch colonies about 100 years earlier than British colonies, Protestant missionaries were much more constrained in Dutch colonies than in British and other Protestant colonies. Because there was not a strong nonconformist Protestant missionary movement in the Netherlands, the Dutch were not forced to allow missionaries similar independence from state control. Third, most missionaries in Dutch colonies came from Germany and thus had little political influence in the Netherlands. Thus, I suspect the association between Dutch colonialism and democracy will be negative and Dutch colonies will be influential cases on the Protestant missionary variables unless Dutch colonialism is statistically controlled. I will discuss the motivation for this variable further in the “Predicted Relationships Section.”

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<sup>72</sup> South Africa may be an exception. South Africa took over Namibia from the Germans after 1917. In Namibia, South African settlers had dominant influence and South African missionaries got much of their support from South African settlers. Thus, I do not expect that missionaries had as powerful a pro-democratic influence in Namibia as in British, Australian, New Zealand, and U.S. colonies. However, rather than bias the analysis in favor of my theories by selectively eliminating the exceptions, I included Namibia as the colony of a Protestant power.

*Climate and Geography Variables:*

Climate and geography influenced where missionaries went and may also have influenced the length and type of colonization. Thus, if climatic or geographic factors influence later democratization, we must control for these factors to isolate the independent impact of either missionaries or colonizers. To control for these factors, I created three geographic variables: “latitude,” “island nation,” and “landlocked nation.” I will discuss possible causal mechanisms more in detail in the theory section.

*Latitude:* I used data on the mean latitude for each country from the World Bank (2002).

*Island Nations:* I coded all countries that are completely surrounded by water as islands. However, a few islands have more than one country on them. In my sample, Haiti shares a border with the Dominican Republic, and Papua New Guinea shares a border with part of Indonesia. In these cases I still counted these countries as “island nations.”

*Landlocked Nations:* I coded all countries that do not have direct access to the ocean as landlocked.

*Culture and Origin Variables:*

The culture and institutional forms of citizens may also influence a country’s prospects for democracy. Although I cannot measure culture and institutions directly, I can measure the percent European and the percent Muslim – two factors that previous research suggests are associated with democracy and which are correlated with particular culture and

institutional forms. I also tested a measure for the percent of the population with African ancestry. Outside Africa, this as a proxy for the prevalence of slavery during the colonial period. However, this variable was never statistically significant, so I dropped it from the final tables.

*Percent European:* The first edition of the *World Christian Encyclopedia* (WCE) (Barrett 1982) lists the size of virtually every ethnic group in each country. In an appendix the WCE categorizes these ethnic groups according to broader “racial” categories. I coded all the ethnic groups of European descent and added up the percentages to calculate the percent European. Because I was concerned primarily with the size of the European settler population, I did not code Mulattos, Mestizos, or Amer-Asians as “European.” The only change I made to the WCE’s categorizations was to code Jews as “European” rather than “Middle Eastern.” Most of the Jews in sub-Saharan Africa, East Asia, Oceania, and the Americas came from Europe and would be connected to European culture more than Middle Eastern culture. However, the Jewish population in most nonwestern societies is so small that this coding choice made virtually no difference in any country other than Israel.

*Percent Muslim:* I took data on the percent Muslim in each country from the *World Christian Encyclopedia* (Barrett, Kurian, and Johnson 2001).

*Missionary Variables:*

To test the impact of missionary activity I entered three different variables. The first variable measures the number of years each country was exposed to Protestant missionary

activity prior to 1960. The second variable estimates the proportion of the population in each country that was directly exposed to Christian witnesses by 1900. The third variable measures the prevalence of Protestant missionaries in each country in the year 1925. Thus the three variables flow roughly in chronological order and respectively measure the length, impact, and breadth of missionary activity.

*Years Exposure to Protestant Missionary Activity:* To code the length of exposure to Protestant missions I read several histories of missions for each country in the data set and coded the date of the first permanent Protestant mission station. This variable excludes Protestant religious work with European Protestants. For a more detailed discussion of the sources and procedures I used, see *Appendix Three: Description of Data and Variable Construction*.

*Percent of the Population Exposed to Christian Witness by 1900:* The “percent evangelized by 1900” is an estimate of the percent of each population exposed to Christian witness by the year 1900. It was calculated by the *World Christian Encyclopedia* (Barrett, Kurian, and Johnson 2001).

*Protestant Missionaries per capita in 1925:* To measure Protestant missionaries per capita in 1925, I compiled data on the total number of missionaries in each country from the *World Missionary Atlas* (Beach and Fahs 1925) and data on the population of each country from

various years of the *Statesman's Yearbook*. In each case I chose the population estimate that came closest to the date of the missions data.<sup>73</sup>

Because the missionary data in Beach and Fahs (1925) does not always correspond to modern country boundaries, I adjusted the data by entering all the missionary personnel at each mission station and determining which modern country each station ended up in. I then re-aggregated the data to match current national borders. When the population data in the *Statesman's Yearbooks* did not match modern country borders, I found the earliest population estimate after a “1925 country” split, calculated the proportion of the population that fit into each successor country, and used that proportion to divided the “1925” population data (see *Appendix Three: Description of Data and Variable Construction* for a more detailed explanation). Because the number of missionaries per capita is small in many countries, the coefficients for this variable were extremely large. Thus, I divided all the coefficients for this variable by 10,000. This is equivalent to measuring the number of Protestant missionaries per 10,000 people in the society.

#### *Economic Development Variable (GDP):*

My GDP data come from the *World Development Indicators* (World Bank 2002). I downloaded data from 1960, 1965, 1975, 1980, 1985, 1990, and 1994 (to match the years of the democracy data) and then took the mean GDP for each country. Because the World Bank data begin in different years for different countries, I also made a variable for the year that World Bank GDP data first become available for each country and included this in every regression that I include the GDP variable. I put this “*Year of first GDP Data*” variable at

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<sup>73</sup> Although I consistently refer to the missions data as “missionaries per capita in 1925,” 1925 is the date of publication. Most of the data come from 1923. Thus, I selected the population figures in the *Statesman's Yearbooks* which were closest to 1923.

the bottom of the table to prevent in from distracting from more substantively important variables.

*Modern Education Variables:*

The education data in this analysis come from Barro and Lee (1994). They provide data on elementary, secondary, and post-secondary school enrollments proportional to the school aged population. Barro and Lee's education data ends in 1985. Thus, I used the mean enrollment rates from 1960, 1965, 1975, 1980, and 1985. In case the level of education is systematically related to the data education data became available, I also included a control for "*Year of First Education Data.*"

Because I was concerned about collinearity between primary, secondary, and university enrollment rates, I initially entered only one modern educational variable at a time. Primary enrollment rates had the highest zero-order correlation with democracy, but the significant association was removed in multivariate analysis. It also had a smaller N than secondary education and university education. Both secondary and university education hold up better in multivariate analysis and have the same number of cases. However, because university enrollments seem to have the strongest association with democracy in multivariate analysis, I entered this variable first (Table 11, column 6). In Table 11 column 7 and in Table 12 I added other educational variable – despite problems with collinearity.

*Missionary Education Variables:*

Although I did not focus on missionary education in this analysis, I used three indicators of the number of students per capita in Protestant missionary schools in 1925: one

enumerates students in elementary schools, one in secondary schools, and one in universities. These data also come from Beach and Fahs (1925). I divided these enrollment numbers by data on the total population I collected from the *Stateman's Yearbook*. When necessary, I adjusted the data to match modern borders based on the distribution of missionary personnel.

While Protestant missionaries provided primary education wherever they went, they tended to provide more secondary and university education in societies that had a literary tradition prior to contact with missionaries. Thus, I created a dummy variable for “*societies that were literate prior to contact with Christian missionaries*” and included this variable in the regression any time I entered the missionary education variables. This variable is never statistically significant, but is a theoretically important control variable.

#### Univariate Variable Distributions:

Table 9 shows the univariate distributions of the variables in the analysis. For each variable I computed the skewness and kurtosis only with the cases used in the analysis. The dependent variable “Mean Democracy Score 1950-1994” has no problems with either skewness or kurtosis (both values are close to zero). Most of the independent variables also do not have problems with skewness or kurtosis. However, the variables for “Dutch Colonialism after 1815” and for “Other Protestant Colony” both have skewness and kurtosis. Still, both are dummy variables which represent only a few cases and are not the primary focus of this analysis. The dummy variable for being a Dutch colony is important because Indonesia and Suriname are strong influential cases otherwise.



| Table 9: Univariate Variable Descriptives       |        |          |          |
|---|--------|----------|----------|
| Variables                                       | N Used | Skewness | Kurtosis |
| Mean Democracy Score 1950-94                    | 141    | 0.48     | -0.77    |
| British Colony                                  | 141    | 0.61     | -1.65    |
| Other Protestant Colony                         | 141    | 5.08     | 24.13    |
| Dutch Colony after 1815                         | 141    | 8.31     | 67.94    |
| Latitude  | 141    | 0.55     | -0.49    |
| Island Nations                                  | 141    | 0.97     | -1.07    |
| Landlocked Nations                              | 141    | 1.59     | 0.52     |
| Percent European                                | 141    | 3.22     | 9.46     |
| Percent Muslim                                  | 141    | 0.91     | -0.90    |
| Years Exposure to Protestant Missions           | 141    | 0.76     | 2.21     |
| Percent Evangelized by 1900                     | 141    | 0.56     | -1.48    |
| Protestant Missionaries per capita 1925         | 141    | 2.81     | 8.96     |
| Ln Mean GDP per capita 1960-94                  | 112    | 0.51     | -0.33    |
| Mean Primary Ed. Enrollment p.c. 1960-85        | 60     | 0.02     | -0.76    |
| Mean Secondary Ed. Enrollment p.c. 1960-85      | 65     | 1.30     | 0.96     |
| Mean University Enrollment p.c. 1960-85         | 65     | 2.58     | 8.77     |
| Prot. Miss. Primary Ed. Enrollment p.c. in 1925 | 65     | 2.02     | 3.50     |
| Prot. Miss. Secondary Ed. per capita in 1925    | 65     | 4.74     | 24.72    |
| Prot. Miss. University Ed. per capita in 1925   | 65     | 6.31     | 44.38    |
| Year First Democ. Data                          | 141    | 0.59     | -0.80    |
| Post-1975 Democracy Data Only                   | 141    | 0.52     | -1.76    |
| Year First GDP Data                             | 112    | 0.79     | -1.03    |
| Year First Educ. Data                           | 65     | 5.19     | 26.54    |

The variables for “percent European,” “total Protestant missionaries per capita in 1925,” “mean university enrollment 1960-85” “year of first educational data” and all the “missions education” variables also have problems with skewness and kurtosis. The variable for “year of first secondary education data” is not of theoretical important, I entered it only as a safety precaution in case education varied systematically based on year of data. The missions education variables are also not central to my analysis – I only enter them at the end to see if they provide additional explanatory power.

However, “percent European,” “Protestant missionaries per capita,” and “mean university enrollment 1960-85” are all theoretically important. Skewness makes them more susceptible to influential cases and kurtosis may bias their standard errors. Thus, in my multivariate analysis I carefully checked all the variables for influential cases and normally distributed error terms and reran all the regressions both in OLS with White-corrected standard errors and in GLM with robust standard errors. These procedures are more robust to violations in the distributional assumptions than normal OLS regression is. However, using these corrections had little effect on the final results.

#### Data Coverage:

One difficulty with cross-national research is the lack of high-quality data for the entire world. My sample is limited in two ways. First, the missionary data only cover the nonwestern world. Second, the GDP and educational data cover a non-random sub-sample of these nonwestern societies. The democracy data covers virtually all independent nonwestern societies, but leaves out a few.

I have data for all nonwestern societies for all the independent variables other than GDP and education. However, the editors who originally compiled the missions data did not label religious activity among whites in Europe and among white settlers in “Protestant colonies/former-colonies” as “missions.” For example, the editors did not count religious work among whites in the U.S., Canada, Australia, New Zealand, and South Africa as missions. The *World Missionary Atlas* (Beach and Fahs 1925) labeled this religious work as “evangelism,” and did not collect data on it. As a result, I had to drop Western Europe, Eastern Europe, the U.S., Canada, Australia and New Zealand from my analysis. In these cases the vast majority of religious work and educational work was among people of European descent and was not recorded in the data. Including these cases would distort my analysis by making it appear that very little religious and educational work happened in these societies – which is not true.

Western European societies are among the most educated, economically developed, and democratic societies in the world. Thus, dropping them may influence the relationship between education, economic development, and democracy found in most statistical studies. My analysis only refers to the association of these variables with democracy in the nonwestern world. However, my theoretical and historical work focuses on nonwestern and colonial societies, so deleting Europe is not problematic.

The only former colonies dropped from the analysis are the U.S., Canada, Australia and New Zealand – all former British colonies. They are also among the most educated, economically developed, and democratic societies in the world. Historical evidence suggests that British political institutions and activity by religious groups were important factors in fostering education, economic development, and the spread of political democracy in these

societies. Thus, excluding these countries presumably decreases the coefficients for British colonialism and Protestant religious activity.

I left British colonies with large white settler populations in the analysis (e.g., South Africa and some Caribbean islands), even though Protestant work among whites in these societies is not recorded in the missions data. Because many of these societies are currently more democratic and economically developed than other former colonies, including them will probably attenuate the relationship between the Protestant missionary variables and democracy, education, etc. However, the majority of people in these societies were not of European ancestry, thus the 1925 missionary variable should still have substantial importance in these societies. Moreover, in my regressions I control for both the “percent European” and the “percent evangelized by 1900” – which includes the exposure of Europeans to Christianity. These two variables should mitigate some of this problem. I also carefully checked for outliers and influential cases in all my analyses and neither South Africa nor any British Caribbean Island was ever an outlier or influential case in any of my analyses.

Catholic European-settler-colonies such as Argentina, Chile, Uruguay, and Costa Rica are counted as mission fields in the data and work among European Catholics in these societies is counted as missionary work. If European settlers were important in promoting education, economic development and political democracy, this might bias my coefficients against British colonies and against areas with more Protestant religious activity – Protestant missionaries were generally restricted in these predominantly Catholic, former-Spanish colonies.

To check if including Catholic-settler-colonies distorted my analysis, I reran my models with a dummy variable for “Catholic European-settler colonies.” This had little impact.

Although the “Catholic European-settler” variable had a significant positive association with democracy when entered with the other colonizer variables, this effect disappeared as soon as I controlled for percent European. Moreover, it had little effect on the other coefficients, thus I left it out of the tables in this chapter.

Modern data on GDP and education are also incomplete. The World Bank (2002) provides GDP data for only 79.4% of the countries that have both Bollen’s (2001) political democracy data and Beach and Fahs’s (1925) missions data. The educational data is even less complete. Barro and Lee (1994) provide educational data for only 46.1% of the missions/democracy sample.<sup>74</sup> Unfortunately this reduction in sample directly influences the results.

To demonstrate the effect of sample on the coefficients, I put the same independent variables in columns 2 and 3 and in columns 4 and 5 of Table 11. The only difference in these columns is the sample. In column 2 I used the full sample and in column 3 I used the sample with data on GDP. Similarly in column 4 I used the sample with data on GDP and in column 5 I used the sample with data on both GDP and education.

To test whether GDP and education data were missing randomly, I ran regressions predicting the availability of GDP and education data in the sample of countries with democracy data. In multivariate analysis, British colonies, countries with longer exposure to Protestant missions, and countries with more evangelism by 1900 were more likely to have GDP and education data. Island nations and countries with more Protestant missionaries per capita in 1925 (holding all else equal) were less likely to have GDP and education data. I assume the significant negative association between “Protestant missionaries per capita in 1925” and data availability (after the other missions variables are controlled) is because in

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<sup>74</sup> For a description of the countries in each sample see *Appendix Four: Country-Level Data Availability*.

the early 20<sup>th</sup> century missionaries increasing moved into areas that had high disease rates and difficult access – areas they had not been able to get to before.

*Predicted Relationships between the Independent Variables and Post-Colonial Democracy:*

In the following section I describe the theoretical motivation for entering each variable, the theorized direction of association with democracy for each variable, and the theorized impact controlling for each variable will have on the other variables in the analysis.

Although I have directional theories about the association of each variable with democracy, I use a two-tailed significance test in the tables. Because of this, and the low N, in the tables I indicate which coefficients are significant at the  $p \leq .1$  level and thus would be significant at the  $p \leq .05$  level if I had used a one-tailed test.

*British Colonization:* For the reasons discussed previously in this dissertation I expect British colonies to initially be more democratic than other colonies. However, once we control for Protestant missionary activity, I expect the effect of British colonialism to disappear or be severely reduced.

*Other Protestant Colonization:* Because Protestant missionaries were able to win similar freedom and influence in other Protestant colonial societies, I expect the coefficient for “Other Protestant Colony” to behave similarly to the “British colony” variable. Initially I predict it will be positively and significantly associated with democracy, but after I control for Protestant missions, I expect the positive impact of being the colony of a Protestant power to disappear or greatly diminish.

*Dutch Colonization:* Theoretically Dutch colonies are very distinct from British colonies. The Netherlands had two state churches one Protestant and one Catholic. Moreover, Protestant missions began much earlier in Dutch colonies than in British colonies. However, it developed in a very different way – much closer to the way missions developed in historically Catholic colonies.

The Dutch East India Company (VOIC)<sup>75</sup> hired missionaries and paid their salaries. However, the VOIC let missionaries work only in areas where it served the company interests. They hired few missionaries per capita, blocked ordination of local clergy, and prevented missionaries not directly under their control from working in Dutch territories. In Muslim areas the VOIC prevented Christian missions and even gave converts over to Muslim rulers to be executed as apostates. When missionaries complained about company abuses, the VOIC threatened to kick them out, and missionaries quieted down. The missionary movement never became strong in the Netherlands and the first non-state missionaries did not enter Dutch colonial territories until the mid-19<sup>th</sup> century. Even then, the vast majority of missionaries were German Moravians with little political influence in the Netherlands (Rauws *et al.* 1935; Van den End 2001a: 2001b; WMC 1910d: 137-39; Boxer 1973: 150-1, 154-5). Thus, I do not expect Protestant missions to have as positive an influence in Dutch colonies as in British and other Protestant colonies. I suspect the coefficient for Dutch colonialism will initially be non-significant, but will become negative once missionary activity is controlled.

Because Protestant missions began about one hundred years earlier in Dutch colonies than in other Protestant colonies, I assumed Dutch colonies would be influential cases on

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<sup>75</sup> VOIC is the Dutch abbreviation for the company name and the standard reference used in historical sources.

some of the missions variables. This turned out to be true. Without controlling for Dutch colonization, Indonesia and Suriname were strong influential cases. Controlling for Dutch colonization did not change which other coefficients were significant in any of my regressions, but it did strengthen the positive association between length of Protestant missionary activity and democracy.

*Latitude:* Because countries near the equator tend to have higher disease rates, I predict that countries further from the equator will have higher economic development, and higher levels of political democracy.

Latitude is also an important control because it may have influenced where missionaries went. Prior to antibiotics, vaccines, and malaria drugs, a high proportion of missionaries died in tropical climates. High death rates discouraged widespread early missionary activity. High death rates also hampered the development of missionary institutions such as schools. When most missionaries died within a few years of entering an area – as they did in much of sub-Saharan Africa during the 19<sup>th</sup> century – few missionaries had the longevity required to establish schools and train local teachers. Disease prevalence also seems to have influence the type of institutions colonizers set up. According to the economists Daron Acemoglu, Simon Johnson, and James Robinson (2001; 2002) in societies with high death rates, Europeans set up extractive institutions and invested less in society.<sup>76</sup> If these institutions influenced later economic development, they may also have influenced later political democratization.

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<sup>76</sup> Acemoglu *et al.* use 19<sup>th</sup> century European death rates as an exogenous proxy of institutions, and demonstrate that 19<sup>th</sup> century death rates are associated with later economic growth. I do not use Acemoglu *et al.*'s measure of European death rates because it is only available for 33 of the cases in my sample and because the sources of information they use to estimate death rates are so variable, I do not fully trust their measure.



*Island Nations:* Previous research suggests that island nations are more democratic (e.g., Hadenius 1992; Faris 1999; Clague, Gleason and Knack 2001). I expect to find the same result. Many scholars suggest that this is because islands have less fear of invasion and thus invest less in the military. Another factor may be that islands provided early and easy access to missionaries. Thus, it is important to control for island status to isolate the independent impact of missionaries.

*Landlocked Nations:* Landlocked countries are the opposite of islands, they have harder access to international trade and are more susceptible to influence from their neighbors. Thus, I expect landlocked countries to have lower economic development and have lower levels of political democracy. Distance from the coast may have both delayed colonization and hampered penetrations by missionaries. Therefore, it is also important to control for landlocked status to isolate the independent impact of missionaries and years of colonization.

*Percent European:* Representative democracy first developed in Europe and spread from Europe to other parts of the world. Thus, I suspect that societies with more Europeans will adopt democracy earlier. Moreover, Europeans were more willing to extend political rights to other Europeans than to nonwhites. Thus, I expect societies with more Europeans will score higher on the democracy ratings.

The percent European also serves as an important control. Past research suggests that Europeans set up less “business friendly” institutions in areas with slaves and large (exploitable) nonwhite populations (e.g., Acemoglu, Johnson, and Robinson 2001; 2002). Along with latitude, percentage European functions as a proxy for where Europeans were

able to survive in the 19<sup>th</sup> century. Areas where European settlers did not survive were also areas where missionaries did not survive. Thus, without controlling for percent European, the missions variables might pick up some of the impact of historic European death rates.

Controlling for percent European is especially important for the variable “percent evangelized by 1900.” This variable includes people of European ancestry, whereas the variables “missionaries in 1925” and “length of exposure” focus on work among non-Europeans. Because European settlers might have brought democratic culture with them, the “evangelized by 1900” variable might absorb some of the impact of European settlement if we did not control for this statistically.

*Percent Muslim:* Past research suggests a strong and consistent negative association between the percent Muslim in a society and the level of political democracy. Muslim societies also have more unstable democratic transitions (Gasiorowski and Power 1998, Midlarsky 1998, Huntington 1991, 1993, Lipset 1994; Karatnycky 1999, 2003; Clague, Gleason and Knack 2001; Woodberry and Shah 2004: 57). Thus, I expect the percent Muslims to be negatively associated with democracy. Percent Muslim is also an important control variable both because some historically-Catholic colonizers disproportionately colonized Muslim areas and because missionaries were often kept out of Muslim areas.

France and Italy seem to have disproportionately colonized Muslim areas. Therefore, if we do not control for the percent Muslim, the negative association between Muslim societies and democracy might artificially create a negative association between French and Italian colonization and democracy.

Similarly, Muslims were generally more hostile to Christian missionary work than other non-Christian religious groups. Thus, many colonizers kept missionaries out of predominantly Muslim areas (Beach 1903; Sundkler and Steed 2000; Barnes 2002; Kilby 1969: 236-37; Thiessen 1961: 306) and Protestant missionaries sometimes avoided working among Muslims even when they were legally able to. Because societies with more Muslims tend to be less democratic and also tend to have fewer missionaries per capita, if we do not controlling for “percent Muslim,” the dearth of missionaries in historically Muslim areas might artificially accentuate the positive association between missions and democracy.

*Protestant Missionary Activity:* I measure Protestant missionary activity with three variables: “years of exposure to Protestant missions,” “percent of the population exposed to Christian witness prior to 1900,” and “Protestant missionaries per 10,000 population in 1925.” First, I hypothesize that all three will have significant positive associations with democracy. Second, I predict they will remove (or severely constrain) the positive association between both British colonialism and other Protestant colonialism and democracy. Third, I hypothesize they will remove the impact of the geographic variables (latitude, island, and landlocked). Fourth, I suspect the missions will reduce the impact of the percent European and the percent Muslim, but each will have an independent effect on democracy.

Because I am interested in the cumulative impact of missions, I enter all mission three variables into the regression together. Thus, the variable for “missionaries in 1925” should be interpreted as the impact of missionaries in 1925 relative to the impact of “evangelism in 1900” and “length of exposure to Protestant missions.” Because “missionaries in 1925” is a measure of one period of time and both “evangelism by 1900” and “length of exposure to

Protestant missions” are closer to cumulative measures, I expect the impact of “evangelism” and “exposure” to be greater. The various missionary variables are highly correlated and when I entered each individually, they generally had a stronger positive influence on democracy (as measured by size of coefficient and significance level). However, presenting the multiple tables to demonstrate the individual impact of each missionary variable might overload the reader and provide little additional insight.

However, only some of the influences I discussed in the dissertation will be picked up by the missionary variables in this analysis. For example, missionaries’ impact on moderating British colonial abuses is presumably relatively constant across British colonies regardless of missionaries per capita. Moderating abuses required at least some missionary presence to observe abuses, but depended primarily on the power and independence of the missionary lobby in the colonizing state. Even in colonies with only a few missionaries per capita, these missionaries had access to the same missionary lobby in England as missionaries in colonies with many missionaries per capita. Missionaries were important in pressuring the British to ban slavery, restrict forced labor campaigns, and give up colonial power nonviolently. These reforms influenced all British colonies – regardless of the number of missionaries per capita. Thus, much of the variation in post-colonial democracy caused by differences in colonial abuses or differences in the violence of decolonization, would artificially be attributed to the “British colony” coefficient rather than the “missionary” coefficients.

*Economic Development:* Much of the current literature stresses the positive association between economic development and both the level of political democracy and the stability of

democratic transitions (Bollen 1979; Burkhart and Lewis-Beck 1994; Londregan and Poole 1996; Gasiorowski and Power 1998; Lipset 1994; Midlarsky 1998; Hadenius 1992; Bollen and Jackman 1985a; 1985b; Clague, Gleason and Knack 2001; Treisman 2000). I expect to find the same effect. If we do not find an association in this nonwestern sample, or after we control for missions, this would suggest that the association found in others' research is probably spurious.

If democracy facilitates economic growth, controlling for current GDP will artificially inflate the association between GDP and democracy in my analyses. However, the focus of this dissertation is on the impact of missions and colonialism, not on the impact of GDP. GDP is merely a control and, if anything, using modern GDP data biases the analyses against my theories. If British colonization and greater missionary activity fostered both democracy and economic growth (as they previous chapters suggest they do), controlling for current GDP will increase the coefficient for GDP and remove some of the indirect impact of missions and British colonialism on democracy.

*Modern Education:* Research also consistently suggests an association between education and democracy (Bollen 1979; Crenshaw 1995; Gasiorowski and Power 1998; Kamens 1988; Barro 1999). However, as I demonstrated in Chapter 3, missionaries were central to fostering education in the nonwestern world, and historic missionary activity has a strong and statistically significant impact on modern education rates. Thus, modern education rates may be an intervening variable between missions and democracy. I expect modern education to be significantly associated with democracy and to reduce the positive association between missions and democracy. Moreover, if democracy fosters education, controlling for current

education will artificially inflate the education coefficient. Thus, my analysis should be viewed as a conservative test of the impact of British colonialism and missions on democracy and a lenient test of the impact of education and economic development on democracy.

*Missionary Education:* Education is one mechanism through which missionary activity may have facilitated post-colonial democracy. Although I do not have a cumulative measure of missionary education, I do have enrollment per capita in missionary primary, secondary, and post-secondary schools in 1925. I expect each to be positively associated with democracy. Because I only have missionary enrollment rates for one year and am controlling for modern education rates in the same regression, the missions education variables are a conservative test of the total impact of missionary education.

### Results:

In this section I test which factors predict political democracy in nonwestern countries. In Table 10, I only test those factors for which I have data for every country. In Tables 11 and 12, I add controls for GDP and contemporary secondary enrollment rates. However, many countries do not have GDP and education data. The World Bank provided GDP data for 79.4% of the cases in my original sample (i.e., the 141 countries with both missions and democracy data). The sample with Barro and Lee education data is even smaller. Only 46.1% of the original cases have both GDP and education data.

Unfortunately, both sample reduction and/or statistical controls may influence other coefficients. Thus, in Table 11 I carefully differentiate the change in the coefficients and standard errors caused by sample reduction and by controlling for GDP and modern

education rates respectively. Finally, in Table 12, I add missionary education variables to see if they explain the impact of the missionary coefficients and if they have an association with democracy above and beyond modern education rates.

*Regressions in the Full Sample:*

As we see in Table 10, the impact of the missions variables is very strong. In every regression in Table 10 the coefficients for “years exposure to Protestant missions,” “percent evangelized by 1900,” and “Protestant missionaries per 10,000 population in 1925” are both large and statistically significant. These three variables had the three largest standardized coefficients in all the regressions (standardized coefficients *not* shown in table).

These three variables also have a powerful influence on the “proportion of variance explained” (R-squared). If I only enter the three missionary variables into the equation, the R-squared is .424. If I add the two statistical controls for the years of democracy data (neither of which is statistically significant, and which I include in all the other regressions), the R-squared rises to .433. When I added the colonizer variables to the missionary variables (Table 10, column 2), the R-squared only increased by .043 to .476. When I added the geography, culture, and colonizer variables (column 4), they R-squared only increased by .062 to .495. Thus, the mission variables seem to “explain” the vast majority of the variance.<sup>77</sup>

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<sup>77</sup> Of course in this example, I entered the missions variables first. If I add the mission variables to the colonizer variables, they increase the R-squared by .350; if I add the mission variables to all the colonizer, geography, and culture variables they increase the R-squared by .123 (see Table 10). However, because the missions variables remove the significant influence of virtually all the other variables, I think it is legitimate to attribute the majority of the variance explained to the missionary variables.

The missions variables also have a powerful influence on the other variables in the analysis. When I do not control for the missionary variables (columns 1 & 3), British and other Protestant colonies seem to be significantly more democratic than other nonwestern societies. However, controlling for the missions variables completely removes the positive association between both British and other Protestant colonialism and democracy (columns 2 & 4). This reduction is not because of collinearity; when I control for Protestant missions the standard errors for the colonizer variables actually decreases (compare columns 1 & 2). In Table 10 I only show the results for “Primary British colonies,” but, I also tested “log years of British colonization,” and a dummy variable for when the British were the “last colonizer” – the results were identical. Once I controlled for missions activity, none of the three British colonization variables had a positive association with democracy in any regression. I only show the results for “Primary British colonies” because these colonies had the strongest positive association with democracy – the other British colonialism variables had a weaker positive association with democracy as measured by R-squared and significance level in both univariate and multivariate analysis.

Similarly, when I do not control for missions, Dutch colonies are little different from the mean. But when I control for missions, Dutch colonies have a strong and statistically significant negative association with democracy. In fact, Dutch colonies are over 40 points lower on the democracy scale out of a total range of 100. In column 3 of Table 10 I added “geographic” and “cultural” factors- that is, “latitude,” “island nations,” “landlocked nations,” “percent European,” and “percent Muslim.”



| Table 10: OLS Regression Predicting Democracy in Nonwestern Societies, 1950-1994: Full Sample |                    |                    |                   |                    |                    |
|---|--------------------|--------------------|-------------------|--------------------|--------------------|
|   | 1                  | 2                  | 3                 | 4                  | 5                  |
| British Colony  | 18.02***<br>(5.15) | 2.39<br>(5.06)     | 14.65**<br>(4.71) | 2.68<br>(5.36)     | .63<br>(5.41)      |
| Other Protestant Colony   | 41.29**<br>(12.99) | 17.03<br>(11.07)   | 27.86*<br>(11.67) | 15.10<br>(11.39)   | 24.60*<br>(11.87)  |
| Dutch Colony  | .78<br>(19.28)     | -43.15*<br>(18.57) | 3.68<br>(16.96)   | -41.88*<br>(19.95) | -44.62*<br>(20.03) |
| Latitude  |                    |                    | .33<br>(.20)      | -.03<br>(.20)      | .06<br>(.21)       |
| Island Nation   |                    |                    | 12.41*<br>(5.45)  | 5.79<br>(5.26)     | 7.99<br>(5.32)     |
| Landlocked Nation   |                    |                    | -11.52*<br>(5.67) | -.20<br>(5.68)     | .78<br>(5.62)      |
| % European  |                    |                    | .19+<br>(.10)     | .16<br>(.10)       | .17+<br>(.10)      |
| % Muslim  |                    |                    | -.26***<br>(.06)  | -.06<br>(.07)      | -.01<br>(.07)      |
| Years Exposure to Protestant Missions   |                    | .15**<br>(.05)     |                   | .15**<br>(.05)     | .14**<br>(.05)     |
| % Evangelized by 1900   |                    | .25***<br>(.05)    |                   | .16*<br>(.07)      | .16*<br>(.07)      |
| Protestant Missionaries per 10,000 pop. in 1925   |                    | 3.57**<br>(1.28)   |                   | 3.51**<br>(1.33)   | 4.72*<br>(2.07)    |
| Literate Culture Prior to Missions Contact  |                    |                    |                   |                    | -5.62<br>(5.07)    |
| Prot. Miss. Primary Educ. per 100 pop. in 1925  |                    |                    |                   |                    | .34<br>(1.66)      |
| Prot. Miss. Sec. Educ. per 10,000 pop. in 1925  |                    |                    |                   |                    | -1.01**<br>(.35)   |
| Prot. Miss. Univ. Educ. per 10,000 pop. in 1925   |                    |                    |                   |                    | 16.32**<br>(5.41)  |
| Year 1st Democracy Data   | -.24<br>(.37)      | .27<br>(.30)       | .25<br>(.33)      | .24<br>(.31)       | .26<br>(.31)       |
| Post-1976 Democracy Data Only   | .36<br>(10.68)     | -11.74<br>(9.06)   | -14.05<br>(9.66)  | -11.62<br>(9.53)   | -12.49<br>(9.56)   |
| Constant  | 50.48*<br>(20.74)  | .15<br>(17.55)     | 24.32<br>(18.98)  | 4.70<br>(18.34)    | 4.37<br>(18.51)    |
| N   | 141                | 141                | 141               | 141                | 138                |
| R-squared   | .126               | .476               | .372              | .495               | .542               |

+ < .1, \* < .05, \*\* < .01, \*\*\* < .001; two-tailed test.

Unlike controlling for missions, controlling for geography and culture had little impact on the colonial variables (compare columns 1 & 3). After I control for geography and culture variables, British and other Protestant colonies both still have large and statistically significant positive associations with democracy; Dutch colonialism still has no association with democracy.

Initially, many of the “geography” and “culture” variables seem to have a strong association with democracy. Island nations seem to be more democratic and landlocked societies less democratic. Societies with more Europeans seem to be more democratic (although the coefficient is only marginally significant) and societies with more Muslims less democratic. These associations match my theories and the previous quantitative research.

The one geographic variable that is not significantly associated with democracy is latitude. Although latitude is associated with disease prevalence and death rates and economists often argue that because of this colonizers set up more exploitative institutions in areas close to the equator (e.g., Acemoglu, Johnson, and Robinson 2001; 2002), latitude never had a significant association with democracy in any of my regressions. In case “latitude” is not the best indicator of disease prevalence, I also tested dummy variables for areas where “malaria is endemic” and where “yellow fever is endemic” using data from the World Health Organization. However, neither variable was significant in any regression and they had virtually no influence on other coefficients, thus I left these two variables out of the tables.

However, once I control for missions, the impact of *all* the geography and culture variables disappears (compare columns 3 & 4). Their coefficients all move towards zero and become statistically insignificant. Again this reduction is not because of collinearity, when I

control for missions the standard errors for the geography and culture variables remain virtually unchanged.

These results undermine the theory that what is unique about island nations is that they have smaller polities or have no need to invest as heavily in militaries. If these were the causes, we would expect islands to be significantly more democratic even after we control for missionary activity. However these results are consistent with the theories outlined in this dissertation that what is distinct about islands is that they allowed early and easy access to missionaries – something which is reflected in the historical record. Early and pervasive missionary access in turn influenced the islands education rates, class structure, civil society, and so on, in ways that facilitated post-colonial democracy. This theory may also explain why landlocked societies initially appeared less democratic; they were difficult for missionaries to access. But once missions is controlled, they become indistinguishable from other societies.

Even the impact of percent European disappears once we control for missionary activity. Rather than correlation with European settlement causing the positive association between missions and democracy, correlations with missions seems to cause the positive association between percent European and democracy.

Controlling for missions also removes the negative association between Islam and democracy. Historically, the violent reaction of many Muslim societies to missionary activity motivated colonial governments to restrict missionaries in areas with Muslim rulers. This restriction on missionaries, rather than some other inherently anti-democratic aspect of Islamic societies, may explain the consistently negative association between Muslim societies and democracy found in other quantitative research.

While controlling for missionary activity removes the impact of the geographic and cultural variables, controlling for geographic and cultural variables has little impact on the missions coefficients and standard errors (compare columns 2 & 4). The coefficient for “percent evangelized by 1900” becomes smaller – as predicted – but remains statistically significant. The coefficients for “years exposure to Protestant missions” and “Protestant missionaries per 10,000 population in 1925” remain virtually unchanged.

The robust impact of the missionary variables suggests that the positive impact of missions on democracy is not because missions moved into areas with healthier climates or larger European settlements. The “healthiness” of climates is strongly associated with latitude and also influenced European settlement, and both latitude and percent European are statistically controlled. The impact of missions is also not related to the ease of access to both missionaries and trade – islands and landlocked countries are also both statistically controlled for. Finally, the impact of mission is not related to the prevalence of Muslims or to the type of colonizers that allowed missionary access. Both percent Muslim and former colonizers are controlled. The missions variables take out all these other factors while remaining strong and statistically significant.

Finally, in column 5 of Table 10 I added three missionary education variables to see if they explain the positive association between the original three missions variables and democracy. They do not. All three of the original mission variables retained positive and statistically significant associations with democracy. This suggests that missions also influenced democracy through mechanisms other than education.

However, missionary education seems to be an important factor. In column 5, two of the missions education variables are significantly associated with political democracy.

“Protestant Missionary University enrollment per 10,000 population in 1925” has a significant positive association with democracy. “Protestant missionary secondary school enrollment per 10,000 population in 1925” has a significant negative association with democracy – all else being equal. I am not overly concerned about the “negative impact” of “missionary secondary school enrollments;” there are five other missionary variables in the regression and the coefficient for “missionary secondary education” is positive if I remove the other mission variables.

*Regressions in the Sample with GDP and Modern Education Data:*

In Table 11, I add controls for modern GDP and modern educational enrollments. I enter these variables last for two reasons. First, both GDP and modern educational enrollments limit the sample size. Second, GDP and modern enrollments may be intervening variables between missions and democracy, or colonizer and democracy.

Both GDP and modern educational enrollments are measured after the missions and colonizer variables and both GDP and educational enrollments are measured concurrently with the dependent variable - democracy. Thus, if missions or colonial power facilitated post-colonial education by providing educational infrastructure, trained teachers, and higher educational expectations (as the previous chapters suggest they did), and if education fosters democracy (as previous research suggests it does), then controlling for modern education enrollment will artificially “take the credit” for things missionaries or colonizers initiated.

| Table 11: OLS of Democracy in the Nonwest, 1950-94: Restricted Samples |                    |                    |                    |                    |                    |                     |                     |
|--|--------------------|--------------------|--------------------|--------------------|--------------------|---------------------|---------------------|
| Sample:  | Full Sample        |                    | GDP Sample         |                    | Education Sample   |                     |                     |
|  | 1                  | 2                  | 3                  | 4                  | 5                  | 6                   | 7                   |
| British Colony   | 18.02***<br>(5.15) | 2.68<br>(5.36)     | .86<br>(6.17)      | -1.71<br>(6.39)    | -15.50<br>(9.50)   | -18.41+<br>(9.99)   | -22.37*<br>(9.27)   |
| Other Protestant Colony  | 41.29**<br>(12.99) | 15.10<br>(11.39)   | 16.46<br>(14.90)   | 15.24<br>(14.98)   | 14.88<br>(23.04)   | 22.14<br>(22.70)    | 59.50*<br>(23.83)   |
| Dutch Colony   | .78<br>(19.28)     | -41.88*<br>(19.95) | -39.90+<br>(21.80) | -41.89+<br>(21.84) | -86.95*<br>(33.00) | -111.3***<br>(32.6) | -114.1***<br>(29.8) |
| Latitude   |                    | -.03<br>(.20)      | .07<br>(.23)       | .04<br>(.24)       | .02<br>(.35)       | -.38<br>(.34)       | -.48<br>(.31)       |
| Island Nation  |                    | 5.79<br>(5.26)     | 6.27<br>(6.24)     | 6.37<br>(6.54)     | 11.59<br>(8.71)    | 5.11<br>(8.21)      | -1.52<br>(8.47)     |
| Landlocked Nation  |                    | -.20<br>(5.68)     | -1.62<br>(6.26)    | -.56<br>(6.27)     | -3.97<br>(8.36)    | 5.95<br>(8.24)      | 10.42<br>(7.45)     |
| % European   |                    | .16<br>(.10)       | .06<br>(.12)       | .10<br>(.12)       | .24<br>(.15)       | .15<br>(.14)        | .07<br>(.13)        |
| % Muslim   |                    | -.06<br>(.07)      | -.08<br>(.08)      | -.07<br>(.08)      | -.24*<br>(.11)     | -.19+<br>(.10)      | -.09<br>(.10)       |
| Years Exposure to Prot. Missions                                       |                    | .15**<br>(.05)     | .14*<br>(.06)      | .15*<br>(.06)      | .27**<br>(.09)     | .39***<br>(.09)     | .41***<br>(.08)     |
| % Evangelized by 1900  |                    | .16*<br>(.07)      | .18*<br>(.08)      | .17*<br>(.08)      | .15<br>(.10)       | .20*<br>(.10)       | .27*<br>(.10)       |
| Prot. Miss. per 10,000 pop. in 1925                                    |                    | 3.51**<br>(1.33)   | 3.17*<br>(1.47)    | 3.32*<br>(1.48)    | -3.23<br>(3.69)    | -5.78<br>(3.46)     | -6.76+<br>(3.53)    |
| Log GDP (mean of 1960-94)  |                    |                    |                    | -.53<br>(1.85)     | .97<br>(2.49)      | 1.06<br>(2.28)      | -.06<br>(2.08)      |
| Primary Education (mean 1960-85)                                       |                    |                    |                    |                    |                    |                     | .21<br>(.18)        |
| Secondary Educ. (mean 1960-85)   |                    |                    |                    |                    |                    |                     | .62+<br>(.36)       |
| University Educ. (mean 1960-85)  |                    |                    |                    |                    |                    | 3.75***<br>(1.10)   | 3.25**<br>(1.12)    |
| Year 1st Democracy Data  | -.24<br>(.37)      | .24<br>(.31)       | .51<br>(.37)       | .55<br>(.37)       | 1.69*<br>(.73)     | 2.39***<br>(.69)    | 2.71***<br>(.68)    |
| Post-1976 Democracy Data Only  | .36<br>(10.68)     | -11.62<br>(9.53)   | -19.28+<br>(11.21) | -19.81+<br>(11.26) | -28.71+<br>(16.76) | -35.08*<br>(15.39)  | -35.85*<br>(14.03)  |
| Year 1st GDP Data  |                    |                    |                    | -.31+<br>(.19)     | -.20<br>(.26)      | .01<br>(.24)        | .19<br>(.24)        |
| Year 1st Education Data  |                    |                    |                    |                    |                    | .79<br>(1.11)       | 1.27<br>(1.03)      |
| R-Squared  | .126               | .495               | .489               | .504               | .595               | .679                | .750                |
| N  | 141                | 141                | 112                | 112                | 65                 | 65                  | 60                  |

Constant not shown in table to save space.

+ < .1, \* < .05, \*\* < .01, \*\*\* < .001; two-tailed test.

Similarly, if missions fostered post-colonial democracy and democracy fostered post-colonial education, the coefficient for modern educational enrollments would artificially “take the credit” for the association. The GDP variable has an identical problem. If missions fostered GDP, and GDP fostered democracy; or if missions fostered democracy and democracy fosters economic growth, then the coefficient for GDP would also artificially “take credit for” these associations.

However, when we analyze Table 11, we see that controlling for GDP has little impact on the other coefficients. When I reduced the sample to match the countries with World Bank GDP data, the standard errors on most coefficients increased – as we would expect (compare columns 2 & 3). This sample size reduction was enough to move the coefficient for Dutch colonialism from significant at the  $p \leq .05$  level, to marginally significant at the  $p \leq .1$  level, two-tailed test. However, when I added the control for GDP, the coefficients of the other variables remained virtually unchanged. All the variables stayed at their previous level of significance (compare columns 3 & 4).

Moreover, GDP has no association with democracy. This is surprising given the fact that so much of the previous scholarly literature focuses on economic development as an important factor in promoting democracy. In other analyses, GDP may be capturing the effect of Western Europe, North America, Australia, and New Zealand. However, if the association of GDP and democracy is driven entirely by these cases, economic development may not be the causal factor. Perhaps historic religious and cultural factors in Western Europe, North America, Australia, and New Zealand helped facilitate democracy there (e.g., see Woodberry and Shah 2004; Woodberry 1999) and because other scholars do not control for these factors, they incorrectly assume economic development is the causal factor.

When I reduced the sample to match the countries with Barro and Lee education enrollment data, the standard errors increased again – sometimes quite substantially. However, this time some coefficients changed radically as well (compare columns 4 & 5). The coefficients for British colonialism, Dutch colonialism, and percent Muslim became more negative. The coefficient for percent Muslim increased in magnitude enough to become statistically significant despite a larger standard error. The coefficient for “years exposure to Protestant missions” becomes larger, but the proportional increase is about the same size as its standard error, so this increase has minimal impact on the coefficients significance level. The most problematic case is for “Protestant missionaries per 10,000 population in 1925.” This coefficient switches from being 3.32 and statistically significant, to being -3.23 and not statistically significant – a 6.55 point reduction.

Controlling for modern educational enrollments has some additional impact (compare column 5 with columns 6 & 7). When education is controlled the association of British colonialism in democracy becomes significantly negative. In column 7 British colonies are 22.37 points *less* democratic on a scale from 0 – 100. However, because about two-thirds of the reduction in the coefficient for British colonialism happened when I reduced the sample, it is not clear if British colonialism would have a significantly negative association with democracy if modern educational data were available for all 141 countries in the original sample.

When I controlled for modern education enrollments, Dutch colonies also became less democratic. In the final model Dutch colonies are 114.1 points less democratic – all else being equal. This large coefficient may be partially due to sample, but the Dutch colonialism



coefficient was large, negative, and statistically significant even before I reduced the sample, so sample is not the only cause.

Interestingly, when I controlled for all three modern education variables the positive association between “other Protestant colonies” and democracy became statistically significant. However, we need to interpret this coefficient with caution as it is driven entirely by one case: Papua New Guinea. Most of the other countries that were “other Protestant colonies” did not have either GDP or modern education data. Western Samoa – the only other “other Protestant colony” with democracy, GDP, and university enrollment data, does not have primary education data and was thus dropped from the final regression in Table 11 (i.e., column 7).

Controlling for education also removed the negative impact of percent Muslim on democracy. In fact, the coefficient returns to about the same level as it was before I reduced the sample. However, because (after we control for missions) the negative association between percent Muslim and democracy exists only in the sample with education data, we also need to interpret this “influence of education” with caution.

The impact of modern enrollments on the missionary coefficients is more complex. Controlling for education increases the size of the coefficients for “years of exposure to Protestant missions” and for “percent evangelized by 1900.” Both remain statistically significant. However, controlling for education decreases the coefficient for “Protestant missionaries per 10,000 population in 1925.” When I control for all three modern education variables (i.e., primary enrollment, secondary enrollment, and university enrollment), the coefficient for “Protestant missionaries in 1925” is -6.76 and marginally significant at the  $p \leq .1$  level. However, merely reducing the sample to match the countries with Barro and Lee

education data reduced the coefficient for “Protestant missionaries in 1925” by 6.55 points. Without this “artificial” reduction, the coefficient would probably be close to zero and probably would not be statistically significant. At any rate, the fact that controlling for modern education reduces the size of the “Protestant missionaries in 1925” coefficient suggests that some of the impact of this variable is through fostering modern education.

To further test the impact of missions and education on democracy, I reran the regressions in columns 6 and 7 without the three missions variables. I tried every combination of modern education variables singly, in pairs, and all together, but none of the coefficients was statistically significant unless the missions variables were also in the regression (regressions not shown). As long as the missions variables are in the regression, each of the three modern educational variables is statistically significant when I enter it individually, and both secondary enrollment and university enrollments are significant when I enter the variables in groups. Although I did not predict this result theoretically, and it may be just by chance, it does suggest the strong connection between missions, education, and democracy.

*Regression with Protestant Missionary Education:*

In Table 12, I added the missionary education variables to the full model with the previous colonizer, geography, culture, missions, economic, and two of the modern education variables. I dropped “primary school enrollments” because it reduced the sample by 5 and created so much collinearity that none of the missions, missions education, or modern education variables were statistically significant despite an extremely large R-squared.

In Table 12, all three of the missionary education variables are statistically significant. Both “Protestant mission primary school enrollments per 100 population in 1925” and “Protestant mission university enrollments per 10,000 population in 1925” have a positive association with democracy. “Protestant mission secondary school enrollments per 10,000 population in 1925” have a negative association with democracy – all else being equal. However, the impact of “Mission secondary enrollments” is only negative when the other missionary variables are in the analysis.

Interestingly, the “Protestant mission school enrollment in 1925” variables have little impact on other coefficients – the other coefficients remain virtually the same size and significance level. The one exception is the coefficient for “Protestant missionaries in 1925” which becomes more negative, and statistically significant when I control for missions education in 1925 – all else being equal. The negative coefficient for “Protestant missionaries in 1925” is partially related to the sample – in the sample with education data several influential cases pull the coefficient down.

Moreover, the “missionaries in 1925” coefficient only becomes negative when we control for the other missions variables. The diminishing “missionaries in 1925” coefficient in this context suggests that the additional impact of “missionaries in 1925” (i.e., the impact beyond that of “length of exposure” and “evangelism in 1900”) is primarily through expanding education. In areas where missionaries did not promote education, having additional missionaries in 1925 did nothing to promote democracy.

| Table 12: OLS of Democracy in Nonwestern Societies (1950-94) Controlling for Protestant Missions Education |                     |
|--|---------------------|
| British Colony   | -23.09*<br>(9.49)   |
| Other Protestant Colony  | 45.56+<br>(23.61)   |
| Dutch Colony   | -93.13**<br>(31.58) |
| Latitude   | -.43<br>(.34)       |
| Island Nation  | -4.92<br>(8.72)     |
| Landlocked Nation  | 7.51<br>(8.33)      |
| % European   | .09<br>(.13)        |
| % Muslim   | -.09<br>(.10)       |
| Years Exposure to Protestant Missions  | .36***<br>(.09)     |
| % Evangelized by 1900  | .27**<br>(.10)      |
| Protestant Missionaries per 10,000 population in 1925  | -10.84*<br>(5.00)   |
| Log GDP (mean of 1960-94)  | .19<br>(2.23)       |
| Secondary Education Enrollment (mean 1960-85)  | .67<br>(.40)        |
| Higher Education Enrollment (mean 1960-85)   | 3.44**<br>(1.18)    |
| Literate Society Prior to Missions   | -1.21<br>(6.35)     |
| Protestant Mission Primary Education per 100 pop. in 1925  | 5.93*<br>(2.84)     |
| Protestant Mission Secondary Education per 10,000 pop. 1925  | -1.92*<br>(.78)     |
| Protestant Mission University Education per 10,000 pop. in 1925  | 21.94**<br>(7.40)   |
| R-Squared  | .749                |
| N  | 65                  |

Coefficients for the constant, year 1<sup>st</sup> democracy, post-1975 democracy data only, year 1<sup>st</sup> GDP data, and year 1<sup>st</sup> education data are not shown to save space.

+ < .1, \* < .05, \*\* < .01, \*\*\* < .001; two-tailed test.

Still overall the missions variables have a strong and consistently significant impact on promoting democracy. Despite having 23 coefficients in a sample of 65 countries all six of the missions variables are statistically significant, one at the  $p \leq .001$  level, two at the  $p \leq .01$  level, and three at the  $p \leq .05$  level. In most models all of the missions coefficients are associated with higher levels of democracy, and in the final model four of the six are – including all the coefficients that are significant at the  $p \leq .01$  level or higher.

The missions variables remove the positive impact of British colonialism on democracy as well as all the other geographic and culture variables in the analysis – most of which are statistically significant in any regression without missions variables. The original three missions variables also “explain” more variance than all the other variables combined, as measured by the R-squared. Moreover, the R-squared reaches extremely high levels: .750 in the final model in table 11, .749 in Table 12. R-squareds are very rarely this high for models using real data – most published analyses seem to have R-squares in the .200 to .350 range. This suggests that the models in this dissertation predict democracy in nonwestern societies very well.

#### Assumptions Checks for Final Models:

To check the assumptions for the regressions in my dissertation, I ran a series of tests available in Stata (Stata 2003: vol. 3: 357-84). I checked for colinearity with the variance inflation factor (VIF) and for omitted variables with the *ovtest*. To check for multivariate non-normality of the errors I analyzed residual-versus-fitted plots, ran Breusch-Pagan/Cook-Weisberg score tests for heteroscedasticity (Breusch and Pagan 1979: Cook and Weisberg 1983), Szroeter rank tests for heteroscedasticity, and Cameron & Trivedi decompositions of

the information matrix – which tests for multivariate heteroscedasticity, skewness, and kurtosis (Cameron and Trivedi 1990). To check for curvilinearity, outliers, and influential cases, I analyzed leverage-versus-residual-squared plots, added-variable plots for each regression coefficient, and dfits betas for each coefficient. For the dfits betas I chose a cut off point of  $2/\sqrt{N}$ .

*Full Sample:*

The models for the full sample (that is, the models in Table 10 which do not control for GDP or modern secondary education) consistently had problems with heteroscedasticity. To correct for this problem, I reran them both in OLS with White-corrected robust standard errors and in the Generalized Linear Model (GLM) with the Huber/White/sandwich estimator of variance. These procedures give standard errors that are robust in the presence of heteroscedasticity (Stata 2003: vol. 3: 336-41; vol. 2: 6-37).

However, neither procedure changed the interpretation of the results (see Table 13, columns 1 - 3). The four variables that were statistically significant remained so (i.e., Dutch colonization and the three missions variables) – with robust standard errors two of these variables reach a higher significance level, the other two stay at the same level of significance. The negative association between Dutch colonization and democracy moved from being significant at the  $p \leq .05$  level, to the  $P \leq .001$  level. The positive association between “the number of Protestant missionaries per capita in 1925” and democracy moves from  $p \leq .01$  to  $p \leq .001$ . Although the standard errors of some insignificant coefficients changed, the coefficients remained statistically insignificant.

| Table 13: Democracy in Nonwestern Societies (1950-94) Using Regular OLS, OLS with Robust Standard Errors, and GLM. |             |          |          |            |         |         |
|--|-------------|----------|----------|------------|---------|---------|
| Sample:  | Full Sample |          |          | GDP Sample |         |         |
|  | OLS         | Robust   | GLM      | OLS        | Robust  | GLM     |
| British Colony   | 2.68        | 2.68     | 2.68     | -1.71      | -1.71   | -1.71   |
|  | (5.36)      | (4.67)   | (4.45)   | (6.39)     | (5.44)  | (5.06)  |
| Other Protestant Colony  | 15.10       | 15.10    | 15.10    | 15.24      | 15.24   | 15.24   |
|  | (11.39)     | (10.46)  | (9.96)   | (14.98)    | (14.15) | (13.16) |
| Dutch Colony   | -41.9*      | -41.9*** | -41.9*** | -41.9+     | -41.9** | -41.9** |
|  | (19.95)     | (12.35)  | (11.76)  | (21.84)    | (15.05) | (14.00) |
| Latitude   | -.03        | -.03     | -.03     | .04        | .04     | .04     |
|  | (.20)       | (.22)    | (.21)    | (.24)      | (.29)   | (.27)   |
| Island Nation  | 5.79        | 5.79     | 5.79     | 6.37       | 6.37    | 6.37    |
|  | (5.26)      | (6.27)   | (5.96)   | (6.54)     | (8.43)  | (7.84)  |
| Landlocked Nation  | -.20        | -.20     | -.20     | -.56       | -.56    | -.56    |
|  | (5.68)      | (5.01)   | (4.77)   | (6.27)     | (5.53)  | (5.14)  |
| % European   | .16         | .16      | .16      | .10        | .10     | .10     |
|  | (.10)       | (.13)    | (.13)    | (.12)      | (.15)   | (.14)   |
| % Muslim   | -.06        | -.06     | -.06     | -.07       | -.07    | -.07    |
|  | (.07)       | (.07)    | (.07)    | (.08)      | (.09)   | (.08)   |
| Yrs. Exposure to Prot. Missions  | .15**       | .15**    | .15***   | .15*       | .15*    | .15**   |
|  | (.05)       | (.05)    | (.04)    | (.06)      | (.06)   | (.05)   |
| % Evangelized by 1900  | .16*        | .16*     | .16*     | .17*       | .17+    | .17*    |
|  | (.07)       | (.08)    | (.07)    | (.08)      | (.09)   | (.08)   |
| Protestant Miss. per 10,000 pop. in 1925   | 3.51**      | 3.51**   | 3.51**   | 3.32*      | 3.32*   | 3.32*   |
|  | (1.33)      | (1.26)   | (1.20)   | (1.48)     | (1.41)  | (1.31)  |
| Log GDP (mean of 1960-94)  |             |          |          | -.53       | -.53    | -.53    |
|  |             |          |          | (1.85)     | (1.77)  | (1.64)  |
| Year 1st Democ. Data   | .24         | .24      | .24      | .55        | .55     | .55     |
|  | (.31)       | (.32)    | (.30)    | (.37)      | (.37)   | (.35)   |
| Post-1975 Democ. Data Only   | -11.62      | -11.62   | -11.62   | -19.81+    | -19.81+ | -19.81* |
|  | (9.53)      | (8.78)   | (8.36)   | (11.26)    | (10.42) | (9.68)  |
| Year 1st GDP Data  |             |          |          | -.31+      | -.31+   | -.31*   |
|  |             |          |          | (.19)      | (.17)   | (.16)   |
| N  | 141         | 141      | 141      | 112        | 112     | 112     |

Constant not shown in table to save space.

+ < .1, \* < .05, \*\* < .01, \*\*\* < .001; two-tailed test.

Collinearity was not a serious problem. Although the missions variables had VIFs over 2, all remained statistically significant. Influential cases were also not a serious problem. Although several coefficients had influential cases, these influential cases generally balanced each other out – the size and number of influential cases pulling up the coefficient matched the size and number of coefficients pulling it down. The only exception was the coefficient for “percent evangelized by 1900.” Dfits beta showed that overall, influential cases diminished this coefficient. However, in spite of this it remained positive and statistically significant.

*GDP Sample:*

The models in the sample with GDP data also had problems with heteroscedasticity, but again using robust standard errors in both OLS and GLM had little impact on the interpretation of the coefficients (see Table 13 columns 4 - 6). The negative association between Dutch colonization and democracy again became more significant with robust standard errors ( $p \leq .1$  to  $p \leq .01$ ). The significance levels for the three missions coefficients remained virtually the same. None of the insignificant coefficients became significant.

Collinearity also remained unimportant. The missions coefficients had VIFs over 2, but remained significant. For all other coefficients the VIF was not large enough to change their significance level even if the VIF had been 1.

Again, influential cases were only problematic for the “percent evangelized by 1900” coefficient. Although the “percent evangelized” coefficient remained positive and significant, the overall effect of influential cases was to diminish it. Japan and Israel were the two major culprits. Both are countries that had few Christians in 1900, but in Japan



democracy was imposed by the U.S. during the occupation after WW II and Israel had massive European immigration after 1925. These Jewish immigrants were strongly influenced by Western democratic ideals (at least in applying them to Israeli citizens) even if they were not strongly influenced by Christian missionaries. Other coefficients also had influential cases, but again the positive and negative dfbetas canceled each other out and had little overall impact on the coefficients.

*Modern Education Sample:*

The final models in the sample with Barro and Lee education data did not have problems with multivariate kurtosis, skewness, or heteroskedasticity. Thus, it was not necessary to rerun the models with robust standard errors. Moreover, neither colinearity nor influential cases were problematic. Coefficients with VIFs larger than 2 or 3 were generally still statistically significant. The only exception was “Protestant missionaries per capita in 1925.” It had a VIF of 3.10 and was not significant in model 6. Similarly, although a number of coefficients had influential cases, the positive and negative dfits betas generally balanced each other out. This time, the one exception was “missionaries in 1925.” For “missionaries in 1925” there were six influential cases that pulled the coefficient in a negative direction and only two that pulled it in a positive direction. Moreover, the strongest influential cases were all negative.

*Regression in Table 12:*

The regression in Table 12 did not have problems with non-normality. Colinearity was also not a problem. Although some of the VIFs were very large (up to 7.2), every coefficient that had a VIF over 3 was statistically significant.

However, this regression did have problems with influential cases. Five influential cases pulled the coefficient for “years exposure to Protestant missionary activity” up, three pulled it down. India was particularly influential pulling the coefficient up. On the other hand, most outliers pulled the coefficients for “percent evangelized by 1900” and “missionaries per capita in 1925” down – especially Japan, Seychelles, and Swaziland. The missionary education variables also had important influential cases. Influential cases pulled “Elementary students in missionary schools” and “University students in missionaries schools” down and “Secondary students in missionary schools” up. Thus, all the missionary education variables would have been even more significant without the influential cases. For other variables the number and size of the dfits betas balanced each other out. Thus, the net effect was close to zero. However, in all cases the coefficients are similar to what they were in previous regressions which did not have as serious problems with outliers. Moreover, this regression is not central to my analysis.

*Predicting Democracy in the Sample without Complete Data:*

Education and GDP data are available for less than fifty percent of the original sample and some coefficients changed radically when I reduced the sample accordingly – particularly the coefficients for “percent Muslim” and for “Protestant missions in 1925.” Thus, I ran an additional set of regressions predicting democracy in the sample without GDP

and secondary education data (see Table 14). The results are mostly identical to the regression in Tables 10-13.

Controlling for missions removed the significant positive association between British colonialism and democracy and between “other Protestant colonialism” and democracy. Controlling for mission also removes the negative association between Islam and democracy. Although other coefficients are never statistically significant, controlling for missions pulls these coefficients in the predicted direction. The coefficient for Dutch colonialism moves from positive to strongly negative. The coefficients for the geographic and cultural variables move strongly towards zero. Controlling for missions also massively increases the R-squared. In these regards, the major difference between Table 14 and Table 10 is that the N is much smaller in Table 14 and thus all the coefficients have larger standard errors – preventing some of them from reach statistical significance.

However, among the missions variables, the pattern is distinct from Table 10. The coefficient for “years of exposure to Protestant missions” is both smaller than in Table 10 and statistically insignificant, and the coefficient for “Protestant missionaries per capita in 1925” is both larger than in Table 10 and more statistically significant – despite having a larger standard error. This may explain some of the patterns we see in Table 11. The relationship between “Protestant missionaries in 1925” and democracy is stronger in the data without modern education and GDP data. Thus, when we reduce the sample, we artificially reduce the association between “Protestant missionaries in 1925” and democracy.

| Table 14: OLS of Democracy in Nonwestern Societies, 1950-94:<br>Sample without either Modern Education or GDP Data |  |                    |                   |                   |                   |
|--|--|--------------------|-------------------|-------------------|-------------------|
|  |  | 1                  | 2                 | 3                 | 4                 |
| Colonizer  | British Colony                             | 24.09***<br>(6.81) | 7.03<br>(6.48)    | 21.83**<br>(6.81) | 7.21<br>(7.03)    |
|  | Other Protestant Colony                    | 41.51**<br>(15.08) | 19.52<br>(12.89)  | 34.86*<br>(14.54) | 19.76<br>(13.38)  |
|  | Dutch Colony                               | 11.12<br>(25.36)   | -35.90<br>(23.50) | 19.15<br>(24.55)  | -38.43<br>(25.42) |
| Geography  | Latitude                                   |                    |                   | .41<br>(.26)      | .03<br>(.24)      |
|  | Island Nation                              |                    |                   | 8.74<br>(7.86)    | 1.74<br>(7.69)    |
|  | Landlocked Nation                          |                    |                   | -8.15<br>(8.12)   | 1.98<br>(7.91)    |
| Culture  | % European                                 |                    |                   | .15<br>(.14)      | .20<br>(.14)      |
|  | % Muslim                                   |                    |                   | -.18*<br>(.08)    | .02<br>(.09)      |
| Missions   | Years Exposure to Protestant Missions      |                    | .07<br>(.06)      |                   | .09<br>(.07)      |
|  | % Evangelized by 1900                      |                    | .19*<br>(.08)     |                   | .11<br>(.11)      |
|  | Prot. Missionaries per 10,000 pop. in 1925 |                    | 4.92***<br>(1.44) |                   | 5.42***<br>(1.56) |
|  | Year 1st Democracy Data                    | -.05<br>(.43)      | .15<br>(.35)      | .16<br>(.42)      | .05<br>(.38)      |
|  | Post-1976 Democracy Data Only              | 4.25<br>(13.39)    | -7.48<br>(11.74)  | -6.36<br>(13.72)  | -4.66<br>(12.67)  |
|  | Constant                                   | 30.06<br>(25.04)   | 9.29<br>(20.53)   | 17.32<br>(25.03)  | 11.94<br>(22.20)  |
|  | R-Squared                                  | .246               | .539              | .391              | .558              |
|  | N  | 76                 | 76                | 76                | 76                |

+ ≤ .1, \* ≤ .05, \*\* ≤ .01, \*\*\* ≤ .001; two-tailed test.

Conclusion:

Overall, the relationship between colonial Protestant missions and post-colonial democracy is very strong. Much of the previous empirical research about factors that influence political democracy has focused on economic development, British colonialism, Islam, European settlement, climate, and island status. However, the missions variables in this analysis remove all of these other factors. In fact, only Protestant missions and education are significantly associated with democracy. Moreover, research in chapter 3 demonstrates that even much post-colonial education is rooted in colonial Protestant missions activity. Thus, much of the current theorizing about the factors which influence democracy may be misguided.

Of course there may be other factors which influence democracy that I have not controlled for in my analyses: such as the extent, diversity of the press, the size and diversity of civil society, and the size of the middle class. However, in chapters 1 – 4 I argued that many of these factors are at least partially related to Protestant missionary activity and religious competition. Moreover, the regressions with the missions variables included already have R-squared ranging from a minimum of .476 to a maximum of .750. These are extremely high relative to most social science research. While I do not want to over interpret R-squares, these high R-squares do not suggest that many important variables are left out of the analysis.

Regardless of other possible causes of nonwestern democracy, the fact that missions variables from 1925, 1900, and the 19<sup>th</sup> century so strongly predict late-20<sup>th</sup> century democracy, suggests that scholars of democracy need to look over much broader swaths of history. In separate analyses, I tested my regressions in each year of data, and the missions

variables predict democracy strongly up through the last year of democracy data (1994). The impact of these historic factors does not seem to be going away. Thus, creating contexts where democracy thrives may take longer than many modern scholars assume.

This research also demonstrates the perils of ignoring religious factors in cross-national research. Missions seem to be an important factor that scholars almost universally neglected in their comparative research. For example, the historic literature on the development of Western education in nonwestern societies around the world demonstrates the importance of missionaries, but the extensive comparative literature on the international spread of mass education ignores them (e.g., Meyer et al. 1977; Meyer, Ramirez and Soysal 1992; Benavot and Riddle 1988; Benavot et al. 1991; Ramirez and Boli 1987; Soysal and Strang 1989; Gallego 2003). Similarly, historical studies on the abolition of slavery in particular countries emphasize the role of missionaries and Nonconformist Protestants – but in comparative studies missionaries again disappear (e.g., Blackburn 1988). In the literature on comparative decolonization, scholars focus on ideas like “popular sovereignty,” but do not mention missionary organizations or other institutions that spread these concepts or created political pressure to make governments apply these concepts in the colonies (Strang 1992; also see Tony Smith 1978).

Statistically analyses also often ignore religious factors. Although data on the percentage of populations that adhere to different religious traditions widely available in modern sources, and information on missionary personnel is easily available from historic sources, most scholars do not use it. As far back as 1979, Kenneth Bollen demonstrated that different religious traditions were associated with democracy, but even most articles that cite his work do not include a comparable measure of religion. However, because religious

traditions and missionary work are both correlated with factors other scholars are interested in (such as education and GDP), our research suggests that when scholars do not control for these factors, their coefficients may be highly biased and as a result they may make theories about factors that have no causal import.

This dissertation also has important policy implications. Many scholars and activists are concerned about promoting democracy around the world. Much of their effort has focused on promoting economic development, or tinkering with constitutional language and institutional forms. This dissertation suggests that possibly one important (and neglected) policy option is to promote religious liberty. Competition between religious groups may in turn help civil society, expand education, develop diverse print sources, etc., which may eventually fosters democratization.

This dissertation may also facilitate new theoretical insights in older theoretical traditions. For example, World Culture theory focuses on the diffusion of ideas around the world, but often without sufficient attention to the carriers of these ideas or the power which influences which ideas predominate and influences the systematic variation in the spread of these ideas. This dissertation identifies an important and neglected cross-national carrier of ideas and institutions. Because these carriers had identifiable ideologies and interests, because we have data on exactly where they went and what they did for over 150 years, and because we can identify the colonial contexts that influenced their range of action, we can better identify the processes involved in World Culture diffusion.

Similarly, World Systems theory has the tendency to focus on undifferentiated domination by “core” societies and exploitation of “peripheral” countries. It often does not give sufficient attention to divisions within core societies, cultural factors which shaped the

interaction between core and periphery, or transfer of significant resources from the core to the periphery. Post-colonial scholars and scholars of “Orientalism” also often lump missionaries, settlers, business people, and colonial administrators together as merely different forms of the same colonial domination (e.g. Said 1978). This dissertation suggests we need to more carefully examine the competing interests of these different groups and how the struggle between them shaped the consequences colonialism had on nonwestern societies.

Over two hundred years ago, Evangelical and Nonconformist Protestants began pressuring for religious liberty in the colonies. They won this battle much earlier in Great Britain than in other European colonial powers. Religious liberty influenced the flow of Protestant missionaries, the amount of religious competition in the colonies, the independence of missionaries from state control, and the ability of indigenous religious groups to mobilize for their own interests. These factors in turn influenced education rates, colonial abuses, civil society, and the spread of particular religious traditions. These later factors continue to shape the educational, economic, and political structures of nonwestern societies through the present. The impact of historic missionary activity is strong enough that it is clearly visible in statistical analyses decades, later even when we control for more proximate factors. The shadow of empire still looms.



## APPENDIX ONE

### EVALUATION OF HISTORICAL SOURCES

To insure the quality of my analysis, I combined several different historical and statistical techniques. The strength of the analysis is not based on any one of them, but the cumulative impact when multiple independent tests suggest the same result. In each section I first make a theoretical argument about why non-state Protestant missions should have a particular impact. I then show that the colonial reforms and service provisions I discuss in that section followed the initiation of non-state Protestant missionary activity temporally, and that missionaries and their supporters were important advocates of these reforms or providers of these services. I then demonstrate that between colonizers, countries, and sub-national regions, these reforms or services vary systematically according to where non-state Protestant missionaries were or were not. Whenever data is available, I demonstrate that the prevalence of Protestant missionaries is significantly associated with both historic and modern measures of the outcome variable even after we statistically control for other relevant factors. Thus, I show time ordering, historically identifiable actors, spatial association between countries and with countries, and a statistically significant empirical correlation after controlling for other factors. When all these approaches align, I am more confident that missionaries had causal impact.

To make sure my broad historical analyses did not distort what happened in particular regions or periods, I had many historians read my work to evaluate how well it fit their area of expertise. I discussed my argument with dozens more. Because I also make claims about education, economic development, government institutions, and so on, I had scholars in these

areas read and critique my work as well. Hopefully, this prevented major errors from creeping into the text. I list many of these scholars at the end of this appendix.

*Historical Analysis Procedures:*

In my historical analyses I used three general techniques. First I looked at changes in colonial policy over time – especially changes in British colonial policy. For example, I researched (1) when the British allowed religious liberty in the colonies and who advocated this change in colonial policy; (2) when the British expanded educational expenditures in the colonies and who advocated this spending; (3) when the British banned slavery and other major colonial abuses and who fought for these changes; (4) when voluntary non-governmental organizations developed in British colonies and who initiated them. All these developments occurred shortly after the initiation of Protestant missionary activity and missionaries and their supporters were the central advocates of these changes.

We can differentiate the impact of Protestant missionary activity from Catholic missionary activity because they generally did not begin at the same time and because historians often identify the religious tradition of missionary activists. We can differentiate the impact of missionary activity from colonialism, because they often did not begin at the same time either. In addition to timing, I analyze how the main advocates and resisters of particular policy reforms were. I show that missionaries and their supporters mobilized major pressure campaigns to reform colonial policy and expand education and that many of the key politicians who initiated these reforms had strong ties to the missionary movement.

Second, I compare these developments cross-nationally. Colonizing societies varied systematically in the amount of control they exercised over missions, in the prevalence of

nonstate Protestant missions, and in the power base nonconformist Protestants had in the colonizing state. I analyze if religious liberty, mass education, banning of major colonial abuses, expansion of organizational civil society, and several other reforms developed later and more anemically in the colonies of European powers where nonconformist Protestant missionaries had less influence than in colonies of European powers where they had more influence. Again, they do.

Third, I compare between different regions controlled by the same colonial power to see if education, civil society, etc., vary systematically depending on where nonconformist Protestant missionaries were. Again they appear to. The French, British, and Portuguese kept Protestant missionaries out of some colonial areas more than others areas. These “mission-free” areas have lower education rates and seem to have experienced more extreme colonial abuses. If some unanalyzed aspect of colonial policy caused these differences, we would not expect it to vary according to the level of colonial penetration, rather than the level of Protestant missionary penetration.

#### Statistical Checks:

To check my historical research, I ran statistical analyses using historic missions data and both historic and modern data for various outcomes – including education and political democratization. The results I found are consistent with my historical work. Historic Protestant missionary activity has a powerful impact on both historic and modern educational rates and on levels of post-colonial political democratization. Where possible, I also redid my statistical analyses at the sub-national level. These sub-national analyses also suggest the importance of missionary activity. Thus, the strength of the analysis is not based on any one

approach, it is based on the fact that all these various approaches consistently suggest the same result.

Some scholars might fear that missionaries distorted their statistical data to exaggerate their impact on society; if true, this would systematically bias some of the independent variables. I could imagine motivation for missionaries to exaggerate their number of converts, but I have a harder time imaging the motivation to exaggerate the number of missionaries in the field or the date mission work began. Moreover, if we assume the pressure to exaggerate was comparable everywhere, this overestimation would only influence the intercept.

Finally, only one of my three main missions variables came from missionary sources- “the number of protestant missionaries in each country in 1925.” However, the missionary source (Beach and Fahs 1925) provides data on the gender, marital status, missionary organization, education, and location of each of these missionaries. Exaggerating at this level of detail would imply bold-faced lying. Plus, missions executives were collecting the data to do strategic planning, not for promotional activity – their purpose would mitigate exaggeration. The date of the first stable Protestant missionary station comes from historical sources and is not likely to be exaggerated. The estimate of the percent evangelized by 1900 comes from a modern encyclopedia. Although this encyclopedia uses a combination of missionary and academic historical sources, the three sources of mission statistics are distinct and if biased presumably do not have identical biases.

Missionaries and missionary strategists also had no influence over later government education statistics, World Bank economic data, and academic ratings of political democracy

(the dependent variables). If missionaries distorted their data, they would have had no way to predict where democracy would develop 70 years later, or where governments would expand educational programs. It seems unlikely that three different types of measures of missionary influence collected from completely different sources would all be highly correlated this outcomes published in other sources over which missionaries had no control.

Primary Sources:

Although I generally relied on secondary sources, I also analyzed a broad spectrum of primary sources. Two major repositories were I located these sources were the Missionary Research Library archive at Union Seminary in New York and the IMC archives on microfilm at Yale University. The letters and reports I found describe mission strategies, behind-the-scenes negotiations, and active monitoring of human rights violations (e.g., forced labor, extreme punishment of laborers, killing civilians). They also record direct interaction with high officials in many colonial governments. Although this evidence is anecdotal (I have not found documentation of mission strategists fighting abuses in every country or every colonial power), these documents do show that missionary attempts to monitor and change colonial policy were common and often effective. Because these documents were not intended for publication and many are labeled “confidential,” they have the advantage of avoiding the political posturing *vis-a-vis* colonial governments that was often necessary in published sources. Because of the vast number and specificity of these documents, I did not cite many of them in the text of the dissertation. Because of the breadth of my dissertation, I did not want to get caught up in small details of any particular case. However, I have thousands of pages of IMC related documents photocopied which illustrate a consistent

concern of Protestant missionary leaders for moderating colonial abuses without hampering their ability to do mission work.

I also analyzed the transcripts of the Protestant ecumenical missions councils (e.g., Liverpool 1860; Midway Park 1878; London 1888; New York 1900; Edinburgh 1910; Jerusalem 1925; Madras 1938; etc.). These give evidence of how influential Protestant mission leaders and scholars viewed colonialism and tried to shape colonial policy. These also suggest a consistent concern to moderate colonial abuses.

### Case Selection:

For some of the topics in this dissertation, several broad comparative studies already exist. For example, multiple scholars have studied both the international diffusion of abolition and of mass education. When these comparative sources agreed about a generalization and this matched the evidence I found in readings about particular countries and regions, I felt confident citing these generalizations.

However, for other arguments and sub-arguments I did not find broadly comparative sources and I had to construct my own comparative historical analyses. The countries and regions I used in these analyses varied based on data availability – and partially on data availability in English.

Although I have limited ability in several languages, I am only fluent enough to do scholarly research in English. English provides me access to more sources on Protestant missions and British colonialism, than on Catholic missions and non-British colonialism. To mitigate problems this may cause, I had research assistants search for and read selected sources in German, French, Spanish, Latin, and Italian and asked them to critique my work

from what they read. I only cite non-English sources when I have had research assistants translate relevant portions from these documents into English. Fortunately, significant literatures exist in English on Catholic missions and non-British colonialism for most regions of the world – much of it written by scholars from the nonwestern world or from non-English-speaking European societies. For most arguments, my main problem was having too much literature to sort through, not too little. Moreover, many scholars who have critiqued my work are fluent in other relevant languages and have not made substantive critiques of my work. Although I undoubtedly missed some important sources, I doubt these systematically biased my results.

Still, the availability of literature in English did influence case selection. Rather than pickings a constant set of cases for each argument, I looked for literature on each topic for each colonial power. Sometimes I found sources for a particular colonial power that gave an overview across many of their colonies. However, I often relied on evidence from a variety of individual colonies.

If I did not find modern academic sources that gave overviews of a particular topic for that colonial power, I looked at modern academic sources on individual colonies of that colonizer to see if there was a consistent pattern between regions – for example, if French policy was similar between Africa, South East Asia, and at least one of their island territories. If I found a consistent pattern mentioned in all the sources I read and these sources referred to colonies from multiple regions, I generalized the pattern to colonies where I did not have data.<sup>1</sup> My lists of citations in the main body of the dissertation are often quite long because I

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<sup>1</sup> Belgium and Italy did not have colonies outside Africa, so I did not require confirmation from multiple regions for them. By the late 19<sup>th</sup> and early 20<sup>th</sup> century Portugal also had few colonies outside Africa. Thus, for the Portuguese I looked for consistency in multiple African colonies, but did not require confirmation from Goa or East Timur.

wanted multiple sources, from multiple regions of the world, for each major colonial power. Comparative Protestant missionary sources generally already claimed these patterns, but I did not want to cite them as accurate without diverse support from modern academic sources.

However, so far in this appendix I have talked only about my overall approach. In the following sections I will talk about how I applied my overall approach to each major argument.

*Analyzing Possible Bias in my Historical Sources about Religious Liberty:*

In Chapter 2 I argue that historically Catholic colonizers restricted Protestant missionaries more than historically Protestant colonizers, such as Great Britain, restricted Catholic missionaries. Thus, Catholic missionaries were relatively evenly distributed between the territories of “Catholic” and “Protestant” colonial powers. However, Protestant missionaries went disproportionately to the colonies of “Protestant” powers such as Great Britain, the U.S., Australia, and New Zealand.

To make this argument and minimize bias, I used multiple sources. First I used comparative analyses developed by Protestant missionary strategists to monitor the regulations and abuses of the various colonial administrations. In 1910, Protestant missions leaders formed what became the *International Missionary Counsel* (IMC). One subcommittee of the IMC was the *Committee on Missions and Government*. From 1910 through the 1950s this subcommittee met regularly to discuss how colonial regulations and abuses influenced missions activity. The IMC also mobilized both formal and informal campaigns to expand religious freedom and limit human rights violations in colonial territories. To do this effectively, the leaders needed detailed comparative studies on colonial



regulation of religious groups and abuses of power throughout the world. Thus, the IMC made annual reports and regularly published books comparing the regulations of the various colonial powers and how they hampered or assisted mission work.

The committee based these books on official records and surveys of missionaries in the field. Thus, the reports discuss both the official regulations and how they were enforced in particular territories. They also discuss abuses of power that missionaries believed were worth fighting (see World Missionary Conference 1910b; Warnshuis 1923; International Missionary Council 1923; Grubb 1938; Bates 1945; Albornoz 1959).

I supplemented these IMC sources, with comparative sources compiled by other individuals and groups (Christian Yearbook 1867; Hendricks 1931; Moreira 1935; Cooksey 1935; Leenhardt 1936; Keller 1936; Davis 1938; McLeish 1944; 1945; Morrison 1948; Pfeffer 1953 (1967); Helmreich 1964). Some of these sources analyze the colonies of only one European power or one area of the world, but many cover the entire world. Both the IMC and non-IMC sources analyze both the general patterns of religious regulation by each colonizer and the ways these regulations were implemented in individual colonies. Because many of these sources also give historical analysis of the religious regulation by each colonizer, these sources give me an overview of religious liberty around the world during the 19<sup>th</sup> and early 20<sup>th</sup> centuries from the perspective of early 20<sup>th</sup> century Protestant leaders, academics, and missionary strategists.

I supplemented these published sources with unpublished letters and documents from the Emory Ross papers at Union Theological Seminary in New York City and from microfilms of the IMC papers at Yale Divinity School in New Haven, Connecticut. These papers describe behind the scenes negotiations to restrict abuses and expand religious liberty

in colonial territories and to pressure governments to put clauses protecting religious liberty in international treaties – including the charter of the United Nations.

However, all the published and unpublished sources listed so far were compiled by Protestants. Thus, these sources may be biased against Catholics and focus on Catholic restrictions of Protestants, rather than Protestant restrictions of Catholics. However, several factors suggest that “Catholics” were in fact more restrictive.

First, comparable Catholic sources on religious liberty do not seem to exist. I searched diligently for them on WorldCat, Bookfinder.com, and several other search engines. I also searched the libraries at Yale, Harvard, the University of Notre Dame, Duke, Fuller Seminary, the U.S. Center for World Missions, the University of North Carolina at Chapel Hill, the School of Oriental and African Studies (SOAS), and the British Library. The key words I used brought up multiple Protestant sources, but no Catholic ones from the 19<sup>th</sup> or early 20<sup>th</sup> century. In libraries where I was able to enter the stacks, I also searched the shelves around other useful sources I had found.

In addition, I read transcripts of several Catholic missionary conferences looking for references to fighting for religious liberty in the colonies (e.g., *The Great American Catholic Missionary Congresses*, Kelly 1914), but did not find any. Religious liberty was a common topic at Protestant missionary conferences.

In case sources existed in other languages, I paid several research assistants to search for Catholic sources on comparative religious liberty in German, French, Italian, Latin, and Spanish, they did not find any. I also paid them to read and translate relevant parts of dozens of 19<sup>th</sup> and early 20<sup>th</sup> century Catholic sources on missions around the world – again they found virtually nothing on promoting or comparing religious liberty.

Given that the Catholic Church declared the separation of Church and State anathema during Vatican I (1869-70) (Helmrich 1964) and first recognized religious liberty in Vatican II (1965) (Wilde 2002; Casanova 1996), substantial Catholic research on religious liberty during the colonial period may not exist. If British and American Protestants were so prolific comparing and advocating religious liberty in the colonies and Catholics were virtually silent – than either Catholics were less hampered by restrictions of religious liberty than Protestants or less concerned about it.

Second, modern academic sources on religious liberty and church state relations confirm the conditions the Protestant sources describe and confirm that Great Britain and her colonies had substantially more religious liberty than other European countries or their colonies. I do not have modern sources that describe every country of the world, but I do have sources that describe and compare the religious liberty allowed by all the major colonial powers (Tudesco 1980; Helmstadter 1997; Greenlee and Johnston 1999) and in many of their colonies and former colonies around the world (e.g., Manning 1998; Cruz e Silva 2001; Sundkler and Steed 2000; Gill 1998; Sigmund 1999; Hallum 1996; C. Smith 1991).

Third, *The World Christian Encyclopedia* gives a brief history of the church in each modern country and gives the dates when each the major religious groups first entered each county (Barrett, Kurian, and Johnson 2002). This confirms historically Catholic colonizers restricted Protestants more severely than historically Protestant colonizers restricted Catholics and that Catholic churches were generally founded earlier in areas controlled by “Protestant” powers than Protestant churches were founded in areas controlled by “Catholic” powers.

Fourth, the missionary maps of Protestant and Catholic mission stations shows that Catholics stations were at least as common in British colonies then elsewhere. However, Protestant mission stations are far less dense in areas controlled by “Catholic” powers than in British colonies. This is true even along the same coastline (e.g., West Africa – see Dennis, Beach, and Fahs 1911: map 3; Beach and Fahs 1925: map 16). This demonstrates that difficulty of geographic access was not what blocked Protestant missionaries.

Fifth, modern ratings of religious liberty suggest that Protestant majority societies currently allow more religious liberty than Catholic or other societies (e.g., Marshall 2000: 27). We would expect this if Catholic societies have been more restrictive in the past, we would not expect this if they have not. Thus, all these various sources suggest identical results, while any one of them may be biased, they are unlikely all to be biased in the same direction.

*Analyzing Possible Bias in Historical Sources about Education:*

My discussion of missions and education is based almost entirely on modern academic sources, thus it is not subjects to a “Protestant missionary bias.”<sup>2</sup> Moreover, many of the historical and quantitative sources I cite directly compare colonizers in the whole world, or broad regions like Africa or Eastern Africa. Thus, much of the comparative work was already done. I merely connect the historical literature which universally suggests the importance of missionaries in providing formal education in the colonies, with the comparative literature which suggests that British colonies had more education, but generally ignores the role of missionaries in providing this education or pressuring the government to increase educational expenditures. My statistical evidence confirms that controlling for

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<sup>2</sup> The Protestant missionary sources make similar claims, I just don’t rely on them in my analysis.

Protestant missionary activity removes the positive impact of British colonialism on education rates both during and after colonization. These educational data were collected by governments – not missionaries – and thus are not subject to a Protestant missionary bias.

To support my claims about the general attitude of particular indigenous education and my claims about the general attitudes of settlers, business people, and colonial elites I demonstrate consistent patterns across multiple regions of the world.

*Analyzing Possible Bias in my Historical Sources about Colonial Abuses:*

If my primary reliance on English language sources introduced bias into my analysis, it is most likely in the section about reforming colonial abuses. Unlike for education, I don't have externally collected quantitative data to measure differences in level of colonial abuses. Still several patterns are clear and would not be biased by English language sources. First, non-state missionaries were important in advocating reforms in British colonialism. Second, we know exactly when each colonizer banned some abusive practices – for example, banning slavery and forced labor. The British were the first to permanently ban both and missionaries were central to mobilizing the political pressure to ban these practices. Missionaries and their supporters also lobbied the British government to pressure other countries to ban slavery and forced labor. State-church Catholics may have been important in pressuring for some reforms and some of this activity may not be reflected in the English language literature. But, whatever this pressure may have been, it did not force historically Catholic colonizers to ban slavery or forced labor first. In fact, the Catholic Church did not officially condemn slavery until Vatican II (which ended in 1965).

In other cases the available sources explicitly compare the reactions of Protestant and Catholic missionaries and many of the central sources are in French. For example, in the Belgian Congo where abuses by rubber companies resulted in about 50% of the African population dieing in 20 years, Protestant missionaries protested and were punished, Catholics did not and were rewarded (Hochschild 1998). Similarly abuses happened at about the same time across the border in French Congo – where Protestant missionaries were banned, but Catholic missionaries were not. There was no protest (Coquéry-Vidrovitch 1971). I attribute the different in Catholic and Protestant behavior to church-state issues, not lack of concern for human rights by Catholics. After all, Protestant missionaries in Dutch colonies ignored abuses when the state controlled their salaries and ability to work with locals (Boxer 1973). I only include this example to demonstrate the differences in behavior of non-state-church Protestants and state-church Catholics I cite in this dissertation is not solely due to bias in my sources.

*External Checks:*

My argument covers the entire nonwestern world for almost 200 years, thus there will always be gaps in my knowledge. To prevent oversights and misinterpretations I needed the help of experts on a variety of regions, historical periods, and subject areas. Thus, I sought feedback from as many scholars as possible. So far none has pointed out serious flaws with my argument. To show the breadth of these scholars, I have listed the names of scholars who have read and critiqued later versions of my dissertation. After their names I list their universities and area of specialization.

Next, I list some of the scholars I have discussed my dissertation with at length. I have excluding all the scholars I have discussed my dissertation with during my job talks and all scholars in my department. I have forgotten the names of many more. Again, after each name, I list each scholars institution and specialties.

I have also presented parts of my dissertation at eleven conferences, two invited presentations, and three job talks. Two of the conferences were directly related to my dissertation topic: “*Missions and Human Rights*,” Yale University, New Haven, CN, July 2001; and “*Missions, Nationalism, and the End of Empire*,” Queens’ College, Cambridge University, England, Sept. 2000. At these presentations I was able to discussed my project with dozens of historians, economists, sociologists, political scientists, anthropologist, and regional scholars, almost none of which I have listed below.

I am grateful to all those who have helped me evaluate these arguments and checked my factual information. However, I take full responsibility for any errors that may remain.

*Outside Scholars who have Read and Critiqued my Dissertation:*

*Missions Historians:*

Jonathan Bonk – Director of the Overseas Ministries Study Center,  
Editor of the International Bulletin of Missionary Research. –  
General missions history, the Church Missions Society, 19<sup>th</sup>  
century missionary theory/strategy.

Jay Case – Malone College – Missions in Burma and among African-  
Americans, Missions and education.

William Hutchinson – Harvard University – North American  
missions, 19<sup>th</sup> century missionary theory/strategy.

Ruth Kark – Hebrew University of Jerusalem – Missions in the Middle  
East, Missions and technology transfer.

Dana L. Robert – Boston University – Missions in Africa, Women and missions, Missions and the rise of international organizations.

Wilbert Shenk – Fuller Seminary – General missions history, 19<sup>th</sup> century missionary theory/strategy.

Herbert Swanson – Payap University, Chang Mai, Thailand – Missions in Thailand.

Grant Wacker – Duke University – North American Missions.

Andrew Walls – University of Edinburgh. Founding director of the Centre for the Study of Christianity in the Nonwestern World. – General missions history, missions in Africa.

*Colonial Historians:*

Andrew Porter – King’s College, University of London. Author of the “Oxford History of British Colonialism in the 19th Century” – British colonialism.

*European Historians:*

John M. Headley – UNC-Chapel Hill.

*Economists:*

Robert Barro – Harvard University – Causes of economic growth, cross-national educational data.

Daron Acemoglu – MIT – Economic development in former colonies.

*Sociologists:*

Rodney Stark – emeritus, University of Washington – rational choice, sociology of religion.

John Miller – University of Southern California – The political impact of missions, sociological theory.

*South Asian Scholars:*

Sushil J. Aaron – religious minorities in India.



*Outside Scholars with whom I have Discussed my Dissertation in Detail:*

*Missions Historians:*

Daniel Bays – Calvin College – missions in China.

Sunilkumar Chatterjee – Serampore College, Bengal, India – Protestant missions in India and Burma.

J.T.K. Daniel – Serampore College, Bengal, India – Missions in India .

Agbu Kalu – University of Nigeria, Port Harcourt – Missions in West Africa, West African Christianity.

Lamin Sanneh – Yale Divinity School – Missions in Africa, Bible translation and literacy, abolitionism in Africa.

Rosemany Seton – School of Oriental and African Studies, University of London – Missions archives.

Martha Smalley – Day Missions Library, Yale Divinity School – Missions archives, missions in China.

Brian Stanley – Cambridge University – Missions and British colonialism.

*Church Historians:*

Joel Carpenter – Calvin College – Evangelicals in the first half of the 20<sup>th</sup> century, Christianity in Africa.

Jim Bradley – Fuller Theological Seminary – Nonconformist Protestants and democracy in Great Britain.

*Colonial Historians:*

Rhonda Semple – Calvin College – British colonialism in the 19<sup>th</sup> century.

*Historians of Print Media and Libraries:*

Don Davis – University of Texas at Austin, School of Information – History of libraries and printing.

*Political Scientists:*

Anthony Gill – University of Washington – Religion and politics in Latin America, regulations of religious groups in Latin America.

Mark Rosenzweig – Kennedy School, Harvard University – Development in India.

Timothy Samuel Shah – Center for Ethics and Public Policy  
– Evangelicals and democracy in Africa, Asia, and Latin America;  
South Asian Studies.

*Sociologists:*

Nancy Ammerman – Boston University – Conservative Protestants in North America.

John Boli – Emory University – World culture theory, international nongovernmental organizations (INGOs), international spread of education.

Mounira Charrad – University of Texas at Austin – Political Sociology, French colonialism in North Africa.

Chris Ellison – University of Texas at Austin – Sociology of Religion.

Roger Finke – Penn State University – Sociology of religion, rational choice.

Paul Freston – University of Sao Paulo – Evangelicals and politics in Africa, Asia, and Latin America.

John Meyer – Stanford University – World culture theory, international nongovernmental organizations (INGOs), international spread of education.

Markus Osterlund – University of Helsinki – Evangelicals and politics in Latin America.

Mark Regnerus – University of Texas at Austin – Sociology of religion.

Sharmila Ruddrapa – University of Texas at Austin – South Asian studies.

David Smilde – University of Georgia, Athens – Evangelicals and politics in Latin America.

Lyn Spillman – University of Notre Dame – Sociology of culture.

Bill Swatos – Executive office of the Religion Research Association and the Association the Sociology of Religion – Weber, sociology of religion.

Anne Swidler – University of California, Berkeley – Sociology of culture.

George Thomas – Arizona State University – World culture theory, international nongovernmental organizations (INGOs), international spread of education.

Stephen Warner – University of Illinois, Chicago – Immigrant religion.

Michael Young – University of Texas at Austin – Political sociology, sociological theory, the rise of social movement organizations.

*Economists:*

Gary Becker – University of Chicago – Rational choice theory, Nobel Prize winning economist.

Edward L. Glaeser – Harvard University – International economics, religion and education, editor of Quarterly Journal of Economics.

Larry Iannaccone – George Mason University – Religion and economics, rational choice.

*Historians of India:*

Robert Frykenberg – University of Wisconsin, Madison – missions and colonialism in India.

Roger Headlund – Director, Center for South Asian Studies– missions and colonialism in India.

Chandra Mallampalli – Westmont College– missions and colonialism in India.

*Historians of Non-Governmental Organizations:*

Peter Dobkin Hall – Harvard University – Former director of PONPO (the Program on Non-Profit Organizations).

Julia Berger – Harvard University – Program on Religion and Public Life, Hauser Center for Nonprofit Organizations, John F. Kennedy School of Government.

*Africanists:*

Paul Gifford – University of Birmingham – Religion and politics in Africa.

Rosalind Hacket – University of Tennessee, Knoxville - Pentecostals and politics in Africa.

Terence O. Ranger – Oxford University – Religion and politics in Africa.

Teresa Cruz e Silva – Mozambique – Protestant missions and nationalism in Mozambique.

*Latin Americanists:*

Virginia Garrard-Burnett – University of Texas at Austin – Religion and politics in Latin America, Protestantism in Latin America.

*Anthropologists:*

Dan Shaw – Fuller Seminary – Melanesia, translations, missions.

Bob Stickney – emeritus, Wheaton College – Latin America, economic development, Protestant work in Latin America.

John Camoroff – University of Chicago – Missions impact on indigenous people in Southern Africa.

*Conference, Invited Lectures, and Job Talks where I have Presented Arguments from my Dissertation:*

Job talks (Fall 2002) – Yale University; University of Texas at Austin; & University of Chicago.  
- these involved dozens of discussions with sociologist from multiple disciplines.

“Democratization in Post-Colonial Societies: The Long-Term Influences of Religion and Colonial Governments.” paid presentation for the Religion, Political Economy and Society Project, Weatherhead Center for International Affairs, Harvard University, Sept. 25, 2002.

"The Missionary Movement and Democratization in the Nonwestern World." paid presentation at the Center for Social Research, Calvin College, Grand Rapids, MI, Apr. 2, 2002.

“Religious Liberty, Education, and Economic Development.” presented at the annual meeting of the Society for the Scientific Study of Religion. Salt Lake City, UT, Nov. 2002.

“Monopolistic Religion and the Exploitation of Colonial Societies.” presented at the annual meeting of the Association for the Sociology of Religion, Chicago, IL, Aug. 2002.

“Christian Missions and the Destruction of Nonwestern Societies.” presented at the IV Annual Southeastern Graduate Student Conference, Roanoke, VA, Feb. 2002.

"The Impact of Religion and Colonialism on Democratization in the Non-Western World." presented at the conference on *The Road to Democratization: Freeways and Detours*, Duke University, Durham, NC, Oct. 2001.

"Democratization in Post-Colonial Societies: The Long-Term Influences of Religion and Colonial Governments." presented at the UNC Sociology Colloquium, Chapel Hill, NC, Oct. 2001.

"Missions and Limitations on Colonial Policy." presented at the conference on *Missions and Human Rights*, Yale University, New Haven, CN, July 2001.

"The Impact of Religious Traditions on Colonial Policy and Post-Colonial Democratization." presented at the annual meeting of the *Society for the Scientific Study of Religion*, Houston, TX, Oct. 2000.

"Christian Missions and Democracy in Post-Colonial Societies." presented at the conference on *Missions, Nationalism, and the End of Empire*, Queens' College, Cambridge University, England, Sept. 2000.

- This conferences was especially helpful because I was able to discuss my work with dozens of missions and colonial historians from around the world.

"The Long-Term Influence of Religious Traditions on Levels of Democratization." presented at the annual meeting of the Association for the Sociology of Religion, Washington, DC, Aug. 2000.

"Religion and Democratization: Explaining a Robust Empirical Relationship." presented at the annual meeting of the *Religious Research Association*, Boston, MA, Nov. 1999.

"Religion and the Spread of Democracy." presented at the UNC/Duke/NCState Religion and American Culture Colloquium, Chapel Hill, NC, Nov. 1999.

## APPENDIX TWO

### COMPARATIVE ANALYSIS OF THE ORIGINS OF ABOLITIONISM

In this appendix I briefly discuss the history of abolitionism in France, Spain, Portugal, the Netherlands, Belgium, Germany, and Italy. The discussion of abolitionism in Great Britain is in the main body of the dissertation. Moving most of the historical analysis to this appendix allows me to present each case more carefully without diverting attention from my main argument about democracy in former colonies.

French abolitionism was always a small elite movement centered in Paris. There were no grassroots organizations in the provinces. The French banned Protestant missionaries from their slave colonies and paid the salaries of Catholic clergy. The government appointed so few priests to these colonies and they were stretched so thin, that they worked primarily among white settlers in the towns. So, for example, in the French Antilles there was only one priest for every 10,000 inhabitants (Drescher 1999: 42; Jennings 2000). Almost no priests worked with slaves. Thus, few French priests had intimate exposure to the abuses of slavery or personal friendships with those who were abused and few protested it (Jennings 2000).

The Catholic hierarchy did not oppose slavery and few Catholic clergy got involved in abolitionism<sup>3</sup> – perhaps because so few priests were directly exposed to slavery, the financial control the state maintained over missionaries, and the Catholic Churches fear of inciting more state repression – governments throughout Europe were attacking the Catholic Church, confiscating their land, closing down their schools, and so on. Moreover, because of the paucity of missionaries, French abolitionists had few first-hand accounts of French abuses –

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<sup>3</sup> An exception is Cardinal Charles Lavigerie who – after reading missionary reports about slavery – worked actively to fight it (Sundkler and Steed 2000: 105-6). Perhaps because of the British connection, the French movement was also disproportionately Protestants. Although Protestants made up 2% of the French population, they made up 10 – 30 percent of French abolitionists (Jennings 2000; Drescher 1999: 46).

they were often forced to use stories from British colonies. Thus, the French were never able to mobilize massive petition campaigns or influence elections on the scale that their British counterparts were able to (Jennings 2000; Drescher 1999: 35-56). Moreover, French abolitionism died as soon as slavery was banned in French colonies. There was no organized effort to end slavery elsewhere and little effort to educate or financially help former slaves (Drescher 1999: 35-56).

The Spanish and Portuguese bans on the slave trade were actually treaties with the British government – rather than policies developed through internal political dynamics. As such, they did not have mass popular support and the slave trade continued in Spanish and Portuguese colonies decades after these formal bans (Harmer 2001: 63, 95; O’Neil 1998: 290; Jones 1987:14-21). The Spanish did not formally ban slavery in their colonies until 1886. The Portuguese passed a law banning slavery in their colonies in 1869, but did not enforce it. They did not attempt to ban slavery in their African colonies until 1878 and did not actually do it until 1910 (Rodriguez 1999: 187; Harmer 2001: 53).

Both Spain and Portugal banned slavery only after decades of foreign pressure – and even when they passed laws against it often did little to enforce them (Harmer 2001: 52-3; Rodriguez 1999: 187; Scott 1985; Drescher 1999: 119). There were few Spanish or Portuguese Protestants and Protestant missionaries were either banned or severely restricted in the colonies. Catholic missions were tightly controlled by the State and the Catholic hierarchy did not official condemn slavery until Vatican II (1965). Perhaps as a result, Spanish and Portuguese religious groups played little roll in Spanish and Portuguese abolitionism and planters were able to shape the process to their advantage (e.g., Scott 1985).

The Dutch banned the slave trade in 1814 and slavery in 1863. The prominent historian of slavery Seymour Drescher actually focuses on the lack of Dutch abolitionism as an anomaly (1999: 196-234). If any of the traditional economic explanations for abolitionism were true, we would expect a strong, early abolition movement in the Netherlands, but there was no grass roots abolition movement there. Abolition was an elite government decision made in response to British pressure (Drescher 1999: 196-234). Drescher does not suggest an explanation for the lack of Dutch abolitionism; he just leaves it as an anomaly which undermines traditional explanations.

However, I suspect it is because of the weak Dutch mission movement and the tight control the Dutch exercised over missionaries in their colonies. By 1845 the Dutch had only one missionary organization and sent out only 14 missionaries; none of them worked in Suriname or the Caribbean – where the Dutch practiced slavery (Vahl 1892: 96, 108, 122). In fact, during the entire period of Dutch slavery, missions data sources do not list a single Dutch missionary organization that worked in these slave territories (e.g., Principaux Libraires 1821; Vahl 1892; Grundeman 1867-71). Virtually all the missionaries in Dutch slave territories were German Pietists, and thus could not directly influence Dutch politics. In contrast, by 1850 the British had formed 94 missionary organizations (Drescher 1999: 41) and had close to 1,000 missionaries on the field (Vahl 1892: 118-19).<sup>4</sup>

The Dutch also forced each missionary to get government approval, determined exactly where each missionary could work, moved them if they became too influential in a particular area, and forced them to send all communication in open letters on Dutch charter company

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<sup>4</sup> Drescher's claim of 94 missionary organizations may be too high or include home missions. Vahl (1892) only lists 27 that are actively sending out foreign missionaries in 1845. However, these 27 send out far more missionaries than their Dutch counterpart.



ships. Initially, they also paid missionaries salaries, threatened to withdraw them when missionaries complained about abuses, and restricted the development of indigenous clergy (Boxer 1973: 150-1, 154-5; van den End 2001a; 2001b). This cut off the Dutch general public from people who had both direct experience of Dutch slavery and motivation to fight it. Moreover the attention of the Dutch general public was not regularly focused on the needs of people in the colonies by regular missionary canvassing.

The Germans, Belgians, and Italians never had a significant abolition movement (Drescher 1999: 206-7). They acquired colonies too late to participate in slavery proper and as part of the Treaty of Berlin (1885) officially agreed to suppress slavery and the slave trade. However in spite of this, they used extremely abusive forms of forced labor which were comparable to slavery (Hochschild 1998: 280-81).

## APPENDIX THREE

### DESCRIPTION OF DATA AND VARIABLE CONSTRUCTION

In this appendix I describe the construction of the colonial and missionary variables. Especially the creation of the variable for “Protestant missionaries per capita in 1925” is very complicated and takes up much of this section. I also describe other missions data that I have created and adjusted but have not included in the regressions in this dissertation.

#### Coding Colonizers:

To code the colonial history of every country in the world, I read the history of each country in five different sources: the *Columbia Gazetteer* (Cohen 1998), *Merriam-Webster’s Geographical Dictionary* (1997), the *Encyclopaedia Britannica* (2002), the *World Christian Encyclopedia* (Barret, Kurian, and Johnson 2001), and the *World Book Encyclopedia* (2001).

In every year from 1500 to 2000 A.D., I coded which country controlled each region associated with each modern country.<sup>5</sup> I ignored switches of control that lasted less than one year. Because of the many sources I used, I am confident I found all long-term switches in control of colonial areas and virtually all brief switches of control. Occasionally sources disagreed on the date of first settlement or the years of colonial control. In these cases I generally chose the majority opinion. However, in a couple cases one source gave such detailed historical description that I trusted it over sources that merely gave a date. For European colonizers, these disagreements influenced only a few cases and only influenced dates prior to 1700. Thus, this only influenced countries with extremely long periods of

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<sup>5</sup> This includes information on colonization by nonwestern societies. However, in this dissertation I only look at British colonization, therefore I will avoid a detailed discussion of these data and how I defined colonization by nonwestern societies.

colonization. Because I logged the years of colonial occupation – this minimizes the impact of any error in the coding of this variable.

I defined the beginning of colonization as the date a colonizer established political control – not the date they claimed a region. I generally identified the establishment of political control with the first “stable” colonial settlement – planting a flag on a beach was not a sufficient influence. If Europeans did not establish the personnel and infrastructure to control a region, I did not count it as colonization. If Europeans established a settlement, but it failed after a few years and Europeans did not return for over 15 years, I also did not count this as the beginning of colonization. In these cases I felt the long-term impact was minimal. Granted, establishing a long-term colonial base is not equivalent to controlling the entire region that makes up a modern country, but it was the only clear starting point I could find in the data.

I also did not code the establishment of slave-trading forts on small islands off the coast of West Africa as “colonization.” This is because so many different European societies had slave forts along the same coast that connecting a modern country with any one of these “colonizers” is problematic. Moreover, these slave traders made little direct control of the interior. They traded with African leaders who were in control of these regions and Europeans seldom even ventured into the interior. Most scholars begin the formal colonization of most parts of the African mainland in the 1800s, not the 1500s or 1600s.

*Coding Length of Exposure to Protestant Missions:*

Originally I had hoped to construct a cumulative measure of missionary impact with data on the distribution of missionary personnel every 10 years or so, all the way back to

1813. However, this proved unrealistic with the time and money available. Thus, I created a different measure of the cumulative exposure of each society to Protestant missions.

Using multiple sources, I tried to determine the date of the first open and “permanent” Protestant missionary station in each society. By this I mean, Protestant missionary work among the indigenous population, slaves, imported non-European laborers, or European non-Protestants. I did not count religious work among Protestant Europeans as “mission work.” This choice shortens the “exposure to Protestant missions” in the Caribbean and South Africa where early church work was among the European settler population. Because these societies are currently more democratic than most non-western societies, this probably minimizes the correlation between length of Protestant missions and democracy.

I also wanted the date I chose to signify the beginning of “significant” exposure to Protestant missions. Thus, I did not count the first time a Protestant missionary, preacher, or Bible salesman entered a region. To count as the “first” exposure to Protestant missions, the Protestant presence had to initially last at least five years and could not be immediately interrupted by a period of twenty years or longer. If the initial missionary presence was short, I assumed that its impact had dissipated after twenty years. If the initial presence was substantial, I figured the indigenous Protestant church could carry on without missionary support. My choice delayed the date of “the initiation of Protestant missionary activity” in many Latin American countries and in Portuguese islands off the coast of Africa. Bible distributors and others made early trips through many of these countries but were generally kicked out almost immediately. A long-term missionary presence only developed much later.

To determine when Protestant missions developed in each society I looked up every country, overseas province, or protectorate in both the 2001 edition of the World Christian Encyclopedia (Barrett, Kurian and Johnson 2001) and the Survey of World Missions (Thiessen 1955). When these sources were ambiguous or contradictory or when they did not give an exact date, I looked up information in The Missionary Guide-Book (1846); *Exposé de L'État Actual des Missions Évangéliques* (1821); and over twenty other similar missionary sources.

*Broader Missions Data Project and Constructing the Variable for “Protestant Missionaries per capita in 1925”:*

As part of this project, I constructed a massive data set of virtually all Protestant and Catholic missionary activity from the mid-1800 through the mid-1900s. These data include information about missionary personnel as well as about educational work, medical work, humanitarian work, and indigenous Christians. I have Protestant data that extends back to 1813, but I have not entered this yet. This data is plotted spatially, so I can adjust it to fit any modern national or provincial boundaries. Over a three and a half year period a team of research assistants and I entered and adjusted this data to match modern borders. In this appendix I describe the data we entered and the procedures we used. I also constructed a variable where I coded the date of the first long-lasting Protestant station in each country. I will describe the procedures for constructing this variable at the end of this appendix.

*Years of Data:*

For Protestants we entered and checked world-wide data published in the following years: 1845, 1872-3, 1890, 1902, 1903, 1911, 1916, 1925, 1938, 1952, 1957, 1962, and

1968.<sup>6</sup> However, we have not fully adjusted these data to match current national borders. We have only done this for data published in 1925. Data prior to 1911 are especially problematic as the tables rarely correspond to current national borders, especially in Africa.

For Catholics we entered and checked world-wide data published in 1886, 1906, 1907, 1913, 1925, 1929, 1936, 1950, 1958, 1968, 1976, and 1989. We made the digital maps necessary to adjust the data to fit modern national borders for 1906, 1913, 1925, 1929, 1958, 1968, 1976, 1989. We only adjusted the data to match current borders for 1925.

I chose these particular years from the multiple Protestant and Catholic sources available because they seemed to have high-quality, worldwide data, and because they were spaced about 10 to 15 years apart. For Protestants I chose to enter data from both 1902 and 1903 because each gives data in complementary forms. 1903 has maps of missions stations and a broader range of data. 1902 gives the exact location of schools, hospitals, orphanages and so on. For Catholics I chose to enter data from 1906 and 1907 and from 1925 and 1929 because one source gives broader data and the other provides maps of the dioceses the data correspond to (this allows us to adjust the data more accurately).

#### *Entering and Checking the Data in the Missionary Tables:*

After I selected the best Protestant and Catholic sources, my research assistants (RAs) scanned each table from these sources into the computer using an optical character recognition program (OCR) and converted each printed table into an Excel file. They then checked the data for errors and corrected formatting problems.

The bottom row of most tables summed all the numbers in each column. Whenever tables had these summations, we checked for errors by adding up all the numbers in each

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<sup>6</sup> Most of these data actually refer to the distribution one or two years earlier.

column of our Excel file and comparing our totals to the printed totals. When both totals matched, we assumed the numbers in the column were correct. When the two sums did not match, we compared the numbers in the original source and the numbers in our Excel file until we found all the problems. In a few cases we discovered that the editors of the printed sources had made addition errors (even though all the numbers in our column match the numbers in their column, our totals did not match). In these cases we inserted a comment into the Excel file identifying the problem. We also checked the footnotes for each table to see if the editors explained the discrepancy.

Whenever, the editors did not sum the data in the tables, we checked the data in pairs. One person read the original number from the printed source and another checked the number in our Excel file. I attended and participated in the vast majority of these sessions to make sure my RAs did it conscientiously. When I was not there, I made sure my research coordinator was.

We checked all the data with one of these two ways. We also inserted all footnotes from the tables into our Excel files. Although, we do not use them for this analysis, we will be able to check them in the future. In this way we entered and checked all the tables from the major Catholic and Protestant sources from the 1880s through 1968. We noted addition problem in our evaluation of each source. If a particular source had many addition or printing problems, we downgraded our evaluation of the quality of data in that source. Fortunately, these errors were limited to a few sources.

*Selecting 1925 for Careful Adjustment:*

Initially I hoped to adjust all the Protestant and Catholic data between 1880 and 1968 to fit current borders. This would allow me to better analyze the cumulative impact of missions and account for the varying distribution of missionary activity over time. However, when I started adjusting the tables, I realized this was unrealistic with the time and money I had. Therefore, I decided to completely adjust one year (1925) before beginning the process with any other years. As it turned out, compiling all the names of the Protestant mission stations in 1925, entering the data on the missionary activity at each station, and locating all their longitudes and latitudes took my team of research assistants seven months. It took several more months for me to check the accuracy of what they entered, figure out the 1925 population that corresponds to the area of each modern country, and enter information from other sources to help me adjust the 1925 data accurately.<sup>7</sup>

I decided to focus on 1925 for several reasons. First, it has high quality Protestant and Catholic sources in the same year (Beach and Fahs 1925; Arens 1925). Catholic sources vary widely in both breadth and quality.<sup>8</sup> Many Catholic sources only provide data on priests and religious personnel, not on education, medical work, etc. Several Catholic sources were also edited sloppily. In these sources, editors regularly added up columns of numbers incorrectly. Because the editors were sloppy with the math I could check, I did not trust them with the math I could not check. Many Catholic sources also used different variables for different

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<sup>7</sup> The data in these sources actually comes from 1922–24 – with earlier data from a few dioceses in the Catholic data. I refer to it as 1925 data for simplicity’s sake (this is the date of publication and is easier than referring to a range of years). Thus when looking up population statistics I actually tried to find data closest to 1923.

<sup>8</sup> Protestant sources started much earlier and seem to have more consistent quality than Catholic sources despite the difficulty of collecting data from multiple mission organizations.



countries. This makes worldwide statistical analysis difficult. To use these data, I would need to impute values for many countries or drop these countries from my statistical analysis. Fortunately, the 1925 Catholic source did not suffer from either of these problems. The editors and printers made few errors and used the same variables for each diocese. The 1925 Catholic data also contain many variables on religious personnel, education and medical work, which we can compare directly to the 1925 Protestant source.

Second, 1925 is a good year for testing many of my theories. It is at the beginning of the last stable colonial period, thus it is a good year for analyzing the impact the last colonial power had on each colonial territory. During the 19<sup>th</sup> century, new areas regularly came under colonization and the control of colonial territories sometimes switched between different colonial powers. During World War I, the French, British, and Japanese divided up Germany colonies. But after 1919, virtually all the nonwestern world had been colonized and the colonial occupiers remained relatively stable. Moreover, in 1925 many of the regulations restricting Protestant missionaries from entering certain colonies were still in place. Finally, the data precede the substantial increase in state sponsored education as decolonization approached. Thus, they represent the educational resources that colonial and post-colonial governments had at their disposal when they began to invest in education.

Third, 1925 is the last Protestant source that provides detailed information about every mission station. Thus, it will be important for helping us adjust later years of data. Because we know the locations of and the personnel at each mission station in 1925, we can confidently adjust the data in the 1925 tables to match current borders. In later years we do not have station-level data and thus cannot adjust the data to match current borders as confidently. Fortunately, the post-1925 Protestant data sources usually provide data in units

that correspond to current national borders, but we still need to adjust some data. In these cases we need to make assumptions about the distribution of missionary activity to adjust the data to match current countries. The 1925 data often give us the most proximate estimate of this activity. I also have a series of books which details the exact locations of Protestant missionary activity in many countries and regions sometime between the late 1920s and early 1950s. I will use these data whenever possible, but will use the 1925 data wherever we do not have later studies.

Fourth, because 1925 is the last source with world-wide, station-level data, it is also the best source for finding station locations and connecting them to earlier years. Place names change over time. Because 1925 is closer to the present than other missionary gazetteers, the names it lists are more likely to be in modern gazetteers. Thus, we can find the exact longitude and latitude of mission stations in 1925 more easily than in earlier years. Moreover, the editors usually designed the missionary atlases to facilitate comparison with earlier years. Therefore, the atlases often list earlier names for mission stations. Earlier sources could not predict later names. Thus, we can link place names backward in time more easily than forward in time. In addition, the number of mission stations increased rapidly over the 19<sup>th</sup> and 20<sup>th</sup> centuries. Thus, 1925 has a longer list of mission stations than any of our other sources. This list is most likely to include the station names from previous years than *vice versa*. For these reasons, I decided it was most efficient to find the longitude and latitude of all the stations in 1925 and then link them automatically to stations in earlier years.

*Rationale for Looking Up All the Stations:*

Originally, I planned to enter the mission stations only in areas where I needed to adjust the data in the tables. I thought this would save time. However, soon after we started, I realized this was not workable. I decided it was more efficient to enter all the stations for 1925, match the names of these stations with the stations in other atlases, and connect the longitudes and latitudes from 1925 with earlier years.

I chose this strategy for several reasons. First, I discovered that not all the mission stations listed in the missionary gazetteer are highlighted on the maps.<sup>9</sup> If we did not enter all the stations in the gazetteer, we would miss some stations and adjust the data incorrectly.

Second, I worried that my research assistants (RAs) would make more mistakes if they had to select the stations to enter from the maps, rather than locating all the stations on a list. The categories listed in the tables are often broader than modern countries (e.g., Polynesia or French Equatorial Africa) and my RAs would need to look up all the stations in these regions so I could adjust the data in the tables to match these smaller country units. The borders of these regions were often not clear on the map and my RAs did not initially know where they were.

Moreover, where national borders have changed since 1925, RAs would need to estimate the modern borders of states (the modern borders are not marked on the historic maps) and write down all the stations in the areas where modern national borders do not match the 1925 borders. Because most of my RAs were not expert in political geography, they often did not know the modern or historic names of places. They often did not know if

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<sup>9</sup> Moreover, some of the stations highlighted on the maps were abandoned by 1925 and thus did not contribute data to the tables. Most of these were stations that had been occupied by German missionaries. The French and British governments closed down German missionary work during World War I and many of the stations were never reoccupied. At any rate, they provided none of mission work listed in the tables.

borders changed without carefully comparing the borders with a modern atlas. They also often confused provincial borders with national borders.

Even if RAs found all the problematic areas, it is hard to accurately copy all the names in a broad area of the map. I especially worried about regions that had many mission stations (e.g., what is now Bangladesh, British Lesser Antilles, etc.). I felt this system would create too many possibilities for errors.<sup>10</sup> Moreover, if RAs made errors, I would have no way to detect them. I would have no list of mission stations that I could compare their list to and I would not have complete data for most table categories, so I could not determine if the numbers of stations and personnel matched the numbers in the tables. Because I had my RAs enter all the stations, I could compare the numbers with the numbers in the tables. When the numbers did not match, I could search for stations that they had miss labeled until the numbers in each category matched.

Third, RAs work faster if they look up every station in a list, rather than flipping around in the missionary gazetteer looking for map coordinates and information on personnel at various individual stations.

Fourth, although looking up all the stations increased the time it took to finish 1925, it will speed up the process of adjusting other years because we can automatically link stations between atlases. Thus, we will not need to look up as many stations in other years. If we had used my original approach, we would have needed to copy down the stations in problematic areas of the maps for every year. This is because table categories do not always stay the same, and we cannot assume that 1925 listed all the stations that existed in other years. Stations closed before 1925 and were created after 1925. If we did not recheck the

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<sup>10</sup> Eventually, I looked up all these stations myself anyways. But, I did not know I would do this at the time and I feel more comfortable having had them looked up twice. I can make mistakes too.

map, we would miss these changes and adjust the data incorrectly. Thus in the long run, locating all the stations will not necessarily take more time and it will give me a much more reliable and useful product.

Fifth, I decided it would be valuable to analyze the variation in missionary activity within countries, as well as the variation between countries. By locating all the missionary stations, I can divide the data to correspond to current provinces. Thus, I can test if variation in missionary activity between countries has a similar impact when we look at variation in missionary activity within a colony.

Sixth, the approach I used facilitates the development of digital maps of missionary activity. These will allow us to measure local-level religious competition, analyze exactly where and when women were allowed to run religious organizations outside the direct control of men, and so on.

Seventh, entering all the Protestant station data helps adjust the Catholic data because it allows us to determine how population, disease, terrain and distance from the coast influenced the spread of missionary activity. If we did not enter all the station data, we could not get good estimates of this, especially in regions with stable borders. However, I will discuss this in a later section.

#### *Weaknesses of Using Just 1925:*

There are some weaknesses of using missionary data from only one year. The major weakness is that these data do not capture the cumulative impact that missions had on nonwestern societies. My argument focuses on the long-term, cumulative impact of missions and missionary education on nonwestern societies, using only 1925 data makes it harder for

me to demonstrate my theories. Thus, my current analysis is a very conservative test of my theories. I could measure the impact of missions and missionary education more accurately if I had data over a longer period of time.

Another weakness is that the relative distribution of missionary activity changed somewhat over time. Because the places where Protestant missions worked earliest also tend to be the most democratic, this also biases my analysis against finding an association between missions and democracy. For example, in the early 19<sup>th</sup> century, much of Protestant missionary activity focused on the islands of the Pacific and Caribbean. As the church took root in these places, missionaries shifted their focus elsewhere. Conversely, during the 19<sup>th</sup> century few missionaries worked in Western and Central Africa. Life expectancies of Europeans were dismally low. However, by 1925 anti-malarial drugs were available, and missionaries flooded into these areas. Thus, although the cumulative impact of missions and missionary education was probably greater in the Pacific and Caribbean than in Western or Central Africa, the 1925 data obscure this. Because democracy is stronger in the Pacific and Caribbean than in West and Central Africa, this will bias my analysis against finding a relationship between the two.

Similarly, for most of the 19<sup>th</sup> century Protestant missionaries were banned from many Latin American countries and many colonies of historically-Catholic powers. By 1925 Protestant missionaries had gained access to many of these places. Because democracy is weaker in these areas than in other areas with similar GDPs, etc., this also biases my analysis against finding a relationship between missions activity and democracy.

In addition, the British and French shut down German missions in 1916 and did not allow most to reopen even after WW I ended. By 1925 many of the mission stations and

schools that Germans had staffed and financed were still not functioning. Thus, in 1925 we will underestimate the impact missions had in areas where German missions were strong (Ghana, Togo, Cameroon, Namibia, Tanzania, Rwanda, Burundi, Papua New Guinea, and parts of India). I do not know whether this systematically biases my analysis or merely increases measurement error.

Thus, although 1925 is the best single year of data for my analysis and is correlated with the cumulative impact of missions on nonwestern societies, it underestimates the impact missions had and shifts the seeming impact towards areas that are currently less democratic. Thus, my analysis should be viewed as a very conservative test of my theories.

*Checking the Station Data:*

RAs typed in the name of each missionary station from the 1925 atlas along with all its alternative names. They then looked up the stations in the missionary atlas, estimated their longitudes and latitudes from the map, and wrote down the region or country the stations were in. A different RA then looked up each station and typed the number of missionary organizations that were working at each station. For each station, we counted the number of organizations that currently had personnel at that station, the number that were temporarily vacant, and the number that were vacant because of World War I (and thus were less likely to be reoccupied in the near future). We listed each of these separately. This procedure also helped us check that all the stations were entered and spelled correctly.

Once the stations were entered, I used the country/region that my RAs had written down for that station to determine which table category that station was listed under and which modern country it is in. For example, Bougainville Island is part of the Solomon chain and

was listed in the tables as part of Melanesia. It is currently part of Papua New Guinea. I used a modern atlas, the 1925 missionary atlas, and a geographical dictionary to assist me. Normally this task was easy.

Whenever the “region/country” my RAs had listed for a country was ambiguous, I re-looked up the station in the 1925 missionary atlas, determined which country it was in, and checked its estimated longitude and latitude. I also looked up every station in an area where borders changed (such as what is now Bangladesh and Pakistan) or I knew I would have to adjust the data (such as Swaziland and Lesotho) and identified which modern nation each station should be in. I identified which stations to look up both from the missionary maps and from the regions my RAs listed each station as being in. I also looked up all stations that were on islands (other than Madagascar, Java, Sumatra, or the Philippines) to determine precisely which island the station was on. I assumed that this was an area where my RAs could easily become confused. Because most islands are groups into broad categories in the table (e.g., Polynesia, British Lesser Antilles), I also knew these were areas where I would have to adjust the data to fit into modern countries and thus wanted to make sure I was especially careful. Finally, I checked the names of all stations to see if they fit the language of the country there were listed as being in. I have worked in China and Japan, grew up in Pakistan, Afghanistan, and Saudi Arabia, have traveled in over 50 countries, and also know some German, French, and Spanish. Thus, I can often tell if a place name fits the language of that country. Whenever I did not think a station name fit the country it was listed as being in, I looked up the station and checked.

I then checked the estimated longitude and latitude of every station to see if it matched the country I had listed the station under. I kept a world map next to me so I could determine



which longitudes and latitudes were plausible. Whenever the longitude and latitude did not match the country, I re-looked up the station and corrected its coordinates and/or country label. When I found systematic problems, I looked up every station listed as being part of that county or region. I also looked up all the stations in regions where borders were confusing, such as the mouth of the Congo River and French Indo-China. During this process I also looked for misspellings and alternative names that RAs had left out.

Because I found some misspellings and incorrect numbers of mission organizations at a few stations, I had my head RA go through the entire list again looking for misspellings, missing stations, and correcting the number of mission organizations at each station. Next we looked up all the stations in two web-based gazetteers (the Alexandria Gazetteer and the NIMA Gazetteer)<sup>11</sup>

To improve our chances of finding matches, we searched for mission stations using all their alternative names and entered all names both with and without foreign characters. For example, we search for both Svo Salvador and Sao Salvador. I hired a computer scientist to write a program to search the gazetteers automatically. The program made a 2-degree box around the estimated longitude and latitude for each station. It then searched for any inhabited place with a name that matched any of the names associated with that station.

If the computer found more than one match, we listed these as well. We listed these stations in order of how close they were to our original estimated longitude and latitude. I then checked whether the county I had assigned to each station matched the country the web-based gazetteers listed for each station. When the countries did not match, I looked up that station in both the missionary map and the web-based gazetteer to determine which location I

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<sup>11</sup> Their URLs are <http://fat-albert.alexandria.ucsb.edu:8827/gazetteer/>  
<http://164.214.2.59/gns/html/index.html>

should chose. Whenever I determined that the web-based gazetteers had found the correct place, I used their exact longitudes and latitudes to georeference the station rather than our estimated longitudes and latitudes. We also added all the alternative names for that station listed in the web-based gazetteers. I hope this will eventually help us connect the 1925 station to stations in other missionary atlases.

We found matches for 73.9% of our stations.<sup>12</sup> A large proportion of the stations that we did not find in the web-based gazetteers were in China. I believe this is because the romanization of Chinese characters has changed substantially since 1925 and the communists renamed many places when they came to power in 1949. Different gazetteers also use different conventions for putting spaces, no spaces, or hyphens between syllables in Chinese place names. We did not write a program to search for all the possible permutations of Chinese names. Fortunately for our purposes, we do not need to adjust the data for China.<sup>13</sup> Moreover, I worked and traveled in China for two years and am familiar enough with the language that I can usually determine whether a place is in China based on its name. Thus, I can check if the station ended up in the correct country and be sure that our data adjustment will not be adversely effected. Although China borders have changed slightly since 1925, no missionaries worked in these parts of China, thus we do not need the exact locations of Chinese mission stations to adjust the table data to match current countries. Even if some

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<sup>12</sup> I suspect this is the first time social scientists have attempted this type of massive search of historic place names. The web-based gazetteers that allow this type of searching have only recently come on line. In fact, in order to search for mission stations automatically, we had to negotiate to get direct access to the Alexandria Gazetteers data base and help them rewrite their software to allow batch searches. They then asked to use our program to test their data base. NIMA would not give us direct access to their geographic data base, so one of my RAs had to write a program to click through their webpage like a human would.

<sup>13</sup> Actually we did need to adjust the data for Hong Kong, Macao and Mongolia. However, each of these countries had only one station – which we located easily. Thus, any error in the exact longitude and latitude of stations within China did not influence these adjustments.

Chinese mission stations do not have exactly the right longitude and latitude, they will still end up in China and the data associated with them will end up in the correct country.

Finally, I checked to make sure I had assigned each station to the proper category in the 1925 tables. To adjust the data in the 1925 tables to match current countries I need to know which table category to take the data from. Initially, I used information from the 1925 atlas and from a geographical dictionary to assign stations to their most likely table category. For example, the 1925 missions atlas lists mission stations in the Cayman Islands, but does not list the Cayman Islands as a category in the tables. I labeled Cayman Islands stations as being part of the Jamaica data because the Cayman Islands were under the jurisdiction of Jamaica in 1925. However, I wanted to make sure my assumption was correct.

To check my assumptions, I added up the total number of stations I had listed in each category and compared this to the total number of stations in each category in column 8, Table 1 of the 1925 atlas. I discovered that both occupied stations and “temporarily vacant” stations were listed in the data tables, but stations “Vacant because of the War” were not. Our numbers matched the 1925 atlas very closely. However, some table categories were a few stations off. If the table category was small, I looked up all the stations in the category looking for errors. If the table category was large, I looked up all the stations near the borders, to see if they had been mislabeled. I also rechecked the longitude and latitude of the stations to see if they were plausible. This time I wrote down the possible longitudes and latitude for each country very carefully and looked up any station that was even close to the edge. I was able to solve most of the problems this way.

However, our station listing and the atlases station listing are still 19 stations different (out of 4888 stations). This is an error rate of 0.39% (.003887). Only 10 of these stations are

in categories where we need to adjust the data. We do not know how much of this discrepancy is because we made errors and how much is because the atlas editors made errors. At least for the categories with few stations, I am convinced the errors are theirs. In these categories I checked every station carefully and could not find any errors. Regardless of who is at fault, this will add a small element of random error to my analysis, but is unlikely to have serious implications. If the error is random, it will not bias my coefficients, it will only increase the size of the standard errors, and thus make it slightly harder to find significant results.

Because I cross-checked the data in so many ways, I feel confident that my dataset accurately reflects all the information in the 1925 atlas.

*Adjusting the Protestant Data:*

After I was confident the data were correct and labeled appropriately, I adjusted the Protestant data in the tables to match current countries. I did this in two ways: based on the distribution of mission organizations at missions stations and based on the personnel at mission stations. I will discuss each in turn.

First, I adjusted the table based on the distribution of mission organizations at mission stations. To avoid confusion, I call each mission organization at each mission station a “station organization.” For example, let's assume that in 1925 three mission organizations worked in Tsi-nan-fu (The Church Mission Society, the London Mission Society and the China Inland Mission) and two worked in Teng-chow-fu (the Church Mission Society and the China Inland Mission). Thus, together these two stations have five “station

organizations.” It does not matter that some of the mission organizations at each station are identical.

I know how many mission organizations worked at each station. If I assume that, on average, the same number of people worked at each “station organization,” I can calculate the total number of station organizations in each table category and the proportion of the station organizations that end up in each modern country and adjust the data in the tables accordingly.

For example, to adjust the data for “British India,” I first determined how many station organizations were in “British India.” I then determined the proportion of these station organizations that are in each segment of British India – Pakistan, India, Burma and Bangladesh and divided the data accordingly.<sup>14</sup>

For simplicity’s sake, let us pretend that there were only four mission stations in British India in 1925: Amritsar, Simla, Muree, and Dera Ismael Khan. If two mission organizations worked in Amritsar, four in Simla, one in Muree and two in Dera Ghazi Khan, there were 9 station organizations in British India ( $2+4+1+2 = 9$ ). After British India partitioned, Amritsar and Simla ended up in India and Muree and Dera Ismael Khan ended up in Pakistan. Thus, 6 station organizations ended up in India and 3 in Pakistan. In this case, I would assume that two-thirds of the mission work described in the tables happened in India and one-third in Pakistan.

Second, I adjusted the data based on the number of personnel at each station. Again I determined the countries that correspond to each table category. Whenever a table category

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<sup>14</sup> Because Burma’s current national borders, match historic state borders and we have state-level data for British India, we know exactly what missionaries did in Burma without making assumptions about mission distributions.

covered more than one country, I determined which of these countries had the most mission stations in it. If each country had a small number of mission stations, I compiled a list of all the mission stations in each country in that table category and had my research assistants enter information about all the personnel working for each mission organization at each station (i.e., the number of male missionaries, married female missionaries, single female missionaries, male doctors, and female doctors). If one of the countries had many mission stations, I only had my research assistants enter the personnel at the stations in the smaller countries. For example, with the category that corresponds to British India, my RAs only entered data for Pakistan, Bangladesh, and Burma – not for modern India. For South Africa, they only entered data for Lesotho and Swaziland, and for Nigeria, only for British Mandated Cameroon.

Both these procedures will add some random error to my analysis and thus make it harder to find statistically significant results. Fortunately, we do not need to adjust the data in most table categories. This minimizes error, but may cause heteroscedasticity. The standard error will be greater for counties where we estimate the distribution of missionary activity than in countries where we did not. This will not bias my coefficients, but may bias standard errors.

#### *Adjusting the Catholic Data:*

The Catholic sources provide data by diocese (the area under the control of a bishop).<sup>15</sup> The vast majority of these dioceses fit within current national borders. Thus we assign all

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<sup>15</sup> I am simplifying here. There are several different diocese-like units under bishop-like Catholic hierarchs. The Catholic Church developed these quasi-dioceses and quasi-bishops to get around earlier agreements the

that data from those dioceses to current nation states. However, some historic dioceses cross current national borders. We need to split the data from these dioceses between two or more countries to get complete national-level statistics.

The easiest way to do this is by area. We could determine the proportion of the area of the diocese that fits into each modern country and divide the data accordingly. However, this assumes that Catholic missionaries distributed themselves randomly according to area, which is unrealistic. Catholic missionaries wanted to minister to people, not fill space. Thus, I assumed that Catholics wanted to be randomly distributed according to population – in areas with more people they did more work than in areas with few people. Therefore, we determined the proportion of the dioceses population that falls into each modern country and used this to divide the data.

To do this, we needed digital maps of national borders, diocese borders and population densities. Digital maps of national borders exist for 1990 and 2000, but although we searched for several months, asked several GIS reference librarians and posted messages on several GIS listserves, we could not find digital maps of national borders for earlier years. Thus, we created our own digital maps of national borders every five years back to 1945. This allows us to adjust our data to match national borders for all the years in our democracy data.

Next, we needed digital maps of Catholic dioceses. This allowed us to determine which dioceses crossed national borders and what proportion of these dioceses fit into each country. To do this we scanned the maps of diocese borders from all our Catholic atlases and saved

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Pope made with the Spanish and Portuguese crowns. In these agreements (the Patronato/Padroado), the Spanish and Portuguese crowns gained the right to appoint/approve all bishops in much of the world. To get around this, the Catholic Church began appointing Vicars Apostolic who were not technically bishops, but functioned like them.

them as .tif files. We then labeled the points on the maps were longitude and latitude lines crossed. This information allowed us to warp the images to match the scale and projection of our digital maps of modern national borders. We then placed these digital maps of national borders over these warped images of diocese boundaries and digitized the borders of all dioceses that crossed national borders at any time between 1945 and 2000.

If we wanted to divide the data by area, we could have done it at this point. However, we wanted to improve the accuracy of our estimates, so we added population density data. We did not have accurate population density data from 1925, so we used a digital map of population density from 1990. Although populations increased rapidly between 1925 and 1990, I assumed that population ratios changed less rapidly. I assume that areas that had higher population densities in 1925 still tend to have higher population densities.

We used this population density data to determine the proportion of the diocese's population that fell into each country. In most cases I adjusted the data accordingly. However, I did not want to assign missionary activity to countries that did not have any. Thus, I used information from other historic sources. For example, I know that in 1925 all Catholic missions in the Arabian Apostolic Vicariate took place in what is now Yemen (Storm 1938). Thus, I did not assign any of the data to Saudi Arabia, Bahrain, Oman, U.A.E., Qatar, Kuwait, or British Somaliland. Similarly, I know there was not Catholic mission work in 1925 in Afghanistan, Nepal or Bhutan (Cochrane 1926; Zwemer 1911; Lindell 1997). Thus, I did not assign any Catholic missions to those areas. This process was easier because many Catholic sources list the date when Catholic work first began in each society. I did not assign any Catholic data to societies where Catholic work began after 1925.



The data adjustment procedure listed above will add some error to my data, but I believe it introduces less error than other ways of adjusting the data (i.e., ignoring border change or assuming random distribution according to area).

Eventually I plan to improve this data adjustment procedure. Even though Catholic missionaries wanted to be distributed equally throughout the population, several factors prevented them from doing this. Distance from the coast and difficult terrain blocked them from reaching people. Missionaries also avoided areas where they died rapidly. I can account for these factors because I can use Protestant station data to determine how terrain, distance from the coast, and disease distorted the distribution of Protestant missionaries relative to population. I assume that distance, terrain and disease influenced the distribution of Catholic missionaries in the same way it influenced Protestants.

To do this I will divide the world map into a grid of small boxes called rasters and assign each mission station to a raster cell. This plots the actual distribution of Protestant missionary activity. Next, I will overlay these rasters with information on population distribution, terrain type, distance from the coast, and the prevalence of malaria. I will regress these factors on the actual distribution of Protestant missionary activity and get coefficients for each of these factors. Finally, for each Catholic diocese where we need to adjust the date, I will overlay rasters with population, terrain type, distance from the coast, and prevalence of malaria and use the coefficients from the Protestant data to predict the distribution of Catholics within the diocese.

I will estimate different coefficients for each year of the data. This is because as malaria drugs were discovered and medicine improved, missionaries increasingly moved into areas where they had died before, and as roads and infrastructure developed, missionaries

increasingly moved inland. We have Protestant station data every ten to fifteen years throughout the 19<sup>th</sup> and early 20<sup>th</sup> centuries, thus we can even measure the declining significance of disease and distance from the coast over time.

Even though I have not used this ideal procedure yet, the data adjustment procedures I used are better than other scholars. Most scholars seem to either link historic data to modern states without accounting for changing national borders, or make rough estimates of the overlapping area. I am not aware of any other social scientific research that has used GIS to adjust historical data to match current borders. Thus, although there are flaws in my procedure, it is superior to standard procedures.

However, after moving to Texas and shutting down the team of GIS RAs at UNC, I carefully went through all the digitized maps to make sure I could trust the data adjustments. In the process I found several dioceses that had been digitized or labeled incorrectly. Although I do not think these errors would significantly distort my analyses, it would take a long time and significant expense to correct these problems. The data from these dioceses is divided up area and population density and distributed to several different modern countries. I do not have the computer programming skills to rerun the adjustments or money to pay others to do it.

I also want to use an external list of all dioceses be completely sure the 1925 data include all the activity of secular clergy in areas that were not designated “missions” by the Catholic hierarchy. I am fairly sure it does, but not completely sure. Although checking this sounds trivial, it is actually a complicated and time consuming process. The vast majority of the nonwestern world was considered “mission” territory in 1925, thus even if “non-mission”

territories are excluded from the tables in Arens (1925), it should not have a major impact on the data. However, rather than further delay my dissertation, use possibly problematic statistics, or run analyses that I would have to redo, I decided to forgo using the Catholic data for the time being. I discuss the full process of adjusting the Catholic data in this section so that procedure is documented for future reference and to innumerate the work that went into this dissertation.

## APPENDIX FOUR

### COUNTRY-LEVEL DATA AVAILABILITY

Countries that have Democracy data, but no World Bank GDP data are included in the regressions with the “Full Sample,” but not in later regressions. These countries are Afghanistan, American Samoa, Benin, Brazil, Cape Verde, Congo Brazzaville, Costa Rica, Dominican Republic, Fiji, Ghana, Grenada, Iran, Kiribati, Liberia, Madagascar, Malaysia, Mauritius, Mongolia, Mozambique, Namibia, Nepal, Nigeria, Pakistan, Sierra Leone, Solomon Islands, Syria, Togo, Turkey, and Tuvalu.

Countries that have democracy and World Bank GDP data, but do not have Barro & Lee Secondary education data are included in the regressions with the “Full Sample” and the “GDP Sample,” but not the “Education Sample.” These countries are Angola, Antigua and Barbuda, Armenia, Azerbaijan, Bahamas, Belize, Brunei, Burkina Faso, Burundi, Cambodia, Chad, China, Comoro Islands, Cuba, Cyprus, Djibuti, Equatorial Guinea, Eritrea, Ethiopia, Federated States of Micronesia, Gabon, Guinea, Ivory Coast, Kazakhstan, Democratic People's Republic of Korea, Kyrgyz Republic, Laos, Lebanon, Libya, Maldives, Mauritania, Morocco, Nauru, Oman, Palau, Qatar, Sao Tome and Principe, Saudi Arabia, Somalia, St. Kitts and Nevis, Suriname, Tajikistan, Tonga, Uzbekistan, Vanuatu, Vietnam, and Yemen.

Countries that have Democracy data, World Bank GDP data, and Barro & Lee secondary education data are included in all the regressions. These countries are Algeria, Argentina, Bahrain, Bangladesh, Barbados, Bolivia, Botswana, Cameroon, Central African Republic, Chile, Colombia, Democratic Republic of the Congo, Dominica, Ecuador, Egypt,

El Salvador, Gambia, Guatemala, Guinea Bissau, Guyana, Haiti, Honduras, India, Indonesia, Iraq, Israel, Jamaica, Japan, Jordan, Kenya, Republic of Korea, Kuwait, Lesotho, Malawi, Mali, Mexico, Myanmar, Nicaragua, Niger, Panama, Papua New Guinea, Paraguay, Peru, Philippines, Rwanda, Senegal, Seychelles, Singapore, South Africa, Sri Lanka, St. Lucia, St. Vincent and the Grenadines, Sudan, Swaziland, Tanzania, Thailand, Trinidad and Tobago, Tunisia, Uganda, United Arab Emirates, Uruguay, Venezuela, Western Samoa, Zambia, Zimbabwe.

Countries, overseas territories, and protectorates that have missions data but not democracy data are not included in any of the regressions. Most of these countries/territories do not have democracy data because they are not currently independent or were not independent in 1994 – the last year of the democracy data. These countries and territories are Anguilla, Aruba, Azores, Bermuda, Bhutan, British Virgin Islands, Cayman Islands, Cook Islands, Northern Cyprus, East Timor, French Guiana, French Polynesia, Greenland, Guadeloupe, Guam, Hong Kong, Macao, Madeira, Marshall Islands, Martinique, Mayotte, Montserrat, Netherlands Antilles, New Caledonia, Niue, Northern Marianas, Puerto Rico, Sikkim, Taiwan, Tokelau, Turkmenistan, Turks and Caicos Islands, U.S. Virgin Islands, West Bank and Gaza, and Western Sahara.

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