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H.B. Morse, Customs Commissioner and Historian of China

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and
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John King Fairbank
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THE UNIVERSITY PRESS OF KENTUCKY
In Memoriam

Charles Kingsley Webster
1886–1961

Visiting Lecturer at Harvard University, 1928–1932

Professor of International History
at the University of London, 1932–1953
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Preface

Richard J. Smith

When John King Fairbank died on September 14, 1991, at the age of eighty-four, he left unfinished a book that had been on his mind for nearly sixty years: a biography of Hosea Ballou Morse, one of the best commissioners in the Imperial Chinese Maritime Customs Service during the latter part of the nineteenth century and a scholar whose books profoundly influenced the writing of Chinese history in the West for much of the first half of the twentieth. Throughout John’s own distinguished career as a historian of China, he invariably had a number of scholarly irons in the fire. Although he had completed a substantial part of the long-planned Morse biography by January 1989, he laid the manuscript aside temporarily to work full-time on his magnum opus, *China: A New History*, which with predictable dedication and exquisite timing, he delivered to the Harvard University Press on the day he suffered his fatal heart attack. The book was published posthumously in 1992.

In the meantime, Fairbank had enlisted the aid of Martha Henderson Coolidge, a friend and former graduate student (now an associate in research at the Fairbank Center, Harvard University), to help complete the Morse book. Martha, with characteristic energy and enthusiasm, began to “dig in on research,” exploring recently published books as well as the priceless letters exchanged by Morse and Fairbank during the early 1930s. Inquiries in Nova Scotia unearthed valuable sources on Morse’s ancestry and childhood; investigation of the *North China Herald* yielded colorful descriptions of the various places Morse served in the course of his multifaceted Customs career; careful work on Morse’s correspondence with Charles F. Thwing, an 1876 graduate of Harvard and president of Western Reserve University, produced a wealth of crucial information on his second career, as a historian,
after retirement from the Customs; and extensive communication with Anne Welsford, Morse’s cherished niece, provided insights into the personalities of both Morse and his wife, Nan.

In 1989 Martha began to amplify John’s preliminary drafts with her new material, whereupon he asked her to be a co-author of the Morse volume; but a number of urgent personal and business matters stalled the project. When Martha got back to work for John, it was not on the Morse book but on the final section of the bibliography for China: A New History, which she finished in November 1991. By this time John had passed away, leaving his scholarly affairs in a somewhat unsettled state. At this point, Wilma Fairbank, his widow, asked if I would join Martha in finishing the Morse biography. I had come to know Wilma well during a decade of collaborating with John and Katherine Frost Bruner on editing the journals of Robert Hart, Morse’s superior as inspector-general of Customs. Although my recent scholarly work had taken me in a radically different direction, I agreed to undertake the project. Thus began yet another Customs collaboration with Fairbank and a third partner.

My primary role has been to oversee and contribute to the rewriting process, in order to help unify the styles of John and Martha and to add certain bits of new information. The result is a book that preserves as much of John’s original voice as possible but also amplifies and refines a great deal of his raw biographical material. Martha’s contribution in tracking down new information and incorporating it smoothly into the text, as well as in supplying full references for a great number of absent or incomplete citations, has been substantial.

Despite the diligent research of both John and Martha, as well as some of my own investigations (including another trip to Belfast to consult the Hart journals—this time for the period from 1874 to 1908), we have come up with relatively little information on the more intimate side of H.B. Morse’s life in China. Neither he nor his wife, Nan, kept diaries, and very little of their early personal correspondence survives. Morse’s contemporaries in the Customs Service admired his professional work, but they said comparatively little about either the man or his wife, and the additional Chinese sources I have consulted yield nothing of value that we do not already know. Aside from a few bits and pieces of nineteenth-century correspondence from friends, associates, and family, and the reminiscences of Hosea’s niece Janet (tape-recorded in the early 1980s), virtually everything we know about the personalities of Morse and his wife comes from Nan’s relatives. Ironically, these people adored Hosea and had a decid-
edly negative opinion of Nan. Readers should keep such source biases in mind.

This book is a labor of love in two senses. First, it reflects John’s deep affection for Morse, whom he considered an “adopted grandfather.” It must always have bothered Fairbank that his letter to Morse of February 16, 1934—which enthusiastically reported his “stimulating” conversation with Professor Philipe de Vargas of Yenching University about Morse’s historical scholarship—arrived only after the latter’s death. The letter reads: “He [de Vargas] expressed himself in the most decided terms . . . to the effect that the ‘International Relations’ alone placed their author in a unique class of Master to which no one had attained in spite of much rehashing and monograph-writing. Your ears would have tingled, [and] must have done so on that day. The terms used made me realize more keenly than ever what a debt the world of scholarship and myself not least, owes to one person. With love always, John.”

This biography also reflects the profound feeling Martha and I have for John. The recollections we provided not long ago for the volume entitled *Fairbank Remembered* (1992) merely skim the surface of our boundless esteem and affection.

A number of people have assisted us in the reconstruction of Morse’s colorful and multifaceted life and times. We should like to express our sincere appreciation to all of them. Heather Watts not only found much of the material on Morse’s Nova Scotia forebears and childhood but also went through a good deal of the manuscript and checked it for accuracy and clarity. The Reverend Alan Seaburg advised about Universalism and Morse’s later childhood base in Medford, Massachusetts. Anne Welsford (1909–92) rounded up vital information about the family and provided a personal perspective on her aunt and uncle and their life, friends, and family in England. Through her good offices, the Fairbanks met with Jean Osborne, daughter of Morse’s niece and ward, the late Janet Morse Donnelly, who gave them tapes of her mother’s recollections and various letters.

Professor William P. Alford provided financial assistance for the computer scanning of John’s original typescript in the early stages of this project. Dr. Chi-kong Lai made important additions to the chapter on the China Merchants’ Steam Navigation Company, and Julia Fair not only read chapter 5 but also advised on various editorial matters. Professor William C. Kirby offered a critical reading of the two chapters on Taiwan and later read the entire text. The late Dr. Uwe Brinkmann of Harvard’s School of Public Health considered Morse’s reports of his symptoms and decided he
had schistosomiasis. Brinkmann also provided the historical reasons why
the disease was not diagnosed at the time. Professor Takeshi Hamashita’s
information about Morse’s career as Customs statistical secretary proved to
be invaluable. Professor Thomas Kennedy, a specialist in China’s self-
strengthening movement, went through the entire manuscript, offering
many useful criticisms and comments. Four other individuals did the same,
each from a different perspective: Wilma Fairbank, Florence Trefethen,
Ellen Devine, and Lisa Smith.

The helpful staff of the Harvard University Archives provided
Morse’s 1874 class reunion reports and located other valuable data. Ray-
mond Lum and the Harvard-Yenching Institute Library staff offered similar
assistance. Joan Hill typed John Fairbank’s entire draft manuscript and
unearthed a variety of useful materials. Daisy Ford looked up and photo-
copied the large Thwing-Morse correspondence file and secured permission
for its use through the kindness of the Case Western Reserve University
Archives. Michael Smallman and Mary Kelly of the Queen’s University
Library in Belfast provided ready access to Robert Hart’s journals and a
great deal of other material relevant to our study, including some of Morse’s
correspondence. Florence Trefethen, former executive editor of Harvard’s
Council on East Asian Studies, kindly prepared the index.

A number of other individuals read parts of the manuscript at
various stages of completion and offered valuable suggestions. They include
Professor Bernard Bailyn, Rosamund B. Beasley, Professor Paul A. Cohen,
Ellen Coolidge, the Reverend Peter J. Gomes, Geoffrey Groff-Smith, Pro-
fessor Akira Iriye, Professor Philip A. Kuhn, Professor Ernest R. May,
Professor John Curtis Perry, Professor Benjamin I. Schwartz, Dr. Katharine
Tait, and Professor Hue-Tam Ho Tai.

Other individuals with whom John Fairbank conferred about the
manuscript were Professor Marie-Claire Bergère, Katherine Frost Bruner,
P.D. Coates, Professor Yen-p’ing Hao, and Professor Arthur Schlesinger Jr.
Note on Transliteration

This book employs two commonly used systems of transliterating Chinese names: the so-called Post Office system for rendering the names of treaty ports, provinces, provincial capitals, and the national capital (Peking), and the modified Wade-Giles system for rendering all other Chinese names and terms. Morse did not always follow these conventions in his writings, however.

Note on Exchange

During Morse’s time in China, the so-called customs tael (Chinese: hai-kuan liang; one ounce of silver, weighing approximately 550 grains) was the standard unit of Chinese currency in most treaty port areas. Under normal circumstances it would buy from one hundred to one hundred and thirty pounds of rice during most of the nineteenth century. For a discussion of Ch’ing dynasty prices, see Smith, *China’s Cultural Heritage*, pp. 301-3.

The “dollar” to which Morse often refers is most probably—unless otherwise noted in the text—the “Spanish” or “Mexican” silver dollar, which had an exchange value of 0.65 against the customs tael. In 1873, a customs tael was worth about one-third of a British pound (80 pence or 6s. 8d.; about U.S. $1.65); but by 1889 it had fallen to 71 percent of its 1873 exchange value. By 1894 the tael was worth only 48 percent of its 1873 value, and by 1903, 36 percent. Morse, *International Relations*, 2:407-9, provides a useful discussion of the fall in the exchange value of the customs tael in the late nineteenth century and a convenient chart showing its average annual equivalent in both English gold currency and Chinese copper cash from 1870 to 1904.
H.B. Morse for his fiftieth Harvard reunion, when he received an Honorary LL.D. Harvard University Archives.
Introduction

John K. Fairbank

In 1931 H.B. Morse, the principal historian of China’s foreign relations, was living southwest of London in the quiet town of Camberley, Surrey. Near Aldershot and Sandhurst, the British West Point, it had become a haven for retired brigadiers and civil servants. The friends that Dr. Morse met at the club, when the sometimes inclement weather allowed him to go there, had helped to build and maintain the British Empire. Indirectly, so had he, by serving the Chinese Empire as a commissioner in the Chinese Imperial Maritime Customs Service. That international establishment, brilliantly directed from 1863 to 1911 by its inspector-general, Sir Robert Hart, had woven a spell over all those who succeeded in its employ. As Westerners, they had been Chinese officials, well paid and prominent in the foreign treaty port communities but devoted to China’s cause of survival and modernization.

When retired commissioners came back to live in Western communities, they found few people who could appreciate the toils and trials, adventures and successes, that they had experienced in China. From Dr. Morse’s writings I had sensed something of the innate drama of the devoted, if sometimes sorely tried, spirit of this unique institution. My decision to study it as a Rhodes Scholar graduate student at Oxford in 1930 had led me to Dr. Morse’s door, and we quickly developed a master-and-disciple relationship, maintained until his death in 1934. I took notes on his career and received from him many materials relating to it, including his letter books of pressed copies of informal correspondence with Sir Robert Hart, which I subsequently deposited in the Harvard Library. Dr. Morse was a graduate of Harvard—a member of the class of 1874—and he received an honorary LL.D. there in 1924.
During my work with Dr. Morse we found much in common, and as I prepared to leave England in early 1932, I asked permission to dedicate my book to him, a book, of course, that existed then only somewhere in the future. On December 19, 1932, he replied,

My dear John,

You ask permission to confer immortality on me by dedicating your forthcoming book to me. Of course I take this opportunity of securing that my name shall not die, glad that I can obtain it on such easy terms and as I am seventy-seven now, I hope I may be forgiven even unto seventy (times) seven for being so audacious and grasping as to seize the opportunity. Then when some English-speaking official of the Revenue Department of the Ministry of Finance of China shall take down the volume in his office to learn how the foreigner came to be engaged to show China how to collect revenue without graft; or some Harvard student, grandson of the grandson of a member of the class of 1874, shall desire to refute the erroneous and senile deduction of his professor John King Fairbank (A.B. Harv., B.Litt. & D.Phil. Oxon.) soon to be Emeritus, and should refer his aged professor to his work, written in the freshness and elasticity of youth, on British Policy in China etc. they will note with pride the fact, in the one case that it is dedicated to a former member, 1874–1909, of his own Department, in the other that it was to some extent inspired by a classmate of his own great great grandfather.1

After I had spent four years in China, five years teaching at Harvard, and five years in government service during World War II, my thesis manuscript for the degree of Doctor of Philosophy at Oxford in 1936 had been sufficiently expanded and revised for me to produce Trade and Diplomacy on the China Coast: The Opening of the Treaty Ports, 1842–1854. Thus I was able, twenty-two years after receiving Dr. Morse's permission, to publish in 1953 the following dedication:

IN GRATEFUL MEMORY OF
HOSEA BALLOU MORSE
(1855–1934)
A.B., Harvard, 1874, LL.D., 1924.
Commissioner of Chinese Maritime Customs.
Historian of Chinese Foreign Relations.
DR. MORSE'S contribution to our understanding of modern China's relations with the West was based on his two careers, in the Customs, and in historical research. After graduation from the Boston Latin School and from Harvard in 1874, he entered the Chinese Imperial Maritime Customs Service with three of his classmates. In the next thirty-five years he served at Shanghai, Peking, Tientsin, Pakhoi, Tamsui, Lungchow, Hankow, and Canton, and on many special assignments, concluding with the post of Statistical Secretary in the Inspectorate General. On retirement in 1908 he settled in England, publishing his first large work, The Trade and Administration of the Chinese Empire that same year, the first volume of The International Relations of the Chinese Empire in 1910, and the second and third in 1918. In 1926 he completed The Chronicles of the East India Company, Trading to China in four volumes, with a fifth in 1929. These books still constitute the starting point for study of China's foreign relations, particularly with Britain, between 1634 and 1911.

Dr. Morse's second career, as a scholar, was informed and guided by his earlier practical experience as a civil servant of China. Though he lived through the decades of foreign imperialism and the collapse of the Chinese Empire, his historical work avoids the obtrusive chauvinism of the Western treaty port community of that period. He was a scholar unusually devoted to the idea of scrupulous, impartial, and accurate presentation of the facts. To me, as to other beginners, he offered generous encouragement and wise counsel, while his work gave us firm ground on which to build our smaller contributions.\(^2\)

Now that another thirty-eight years have passed, I have been able, starting with notes I took in 1931, to use Dr. Morse's semiofficial letters to Hart and tell the story of his adventures and travails as a Chinese official. I have even gone further and tried to appraise his work as a historian of Sino-foreign relations.

For a historian who lives long enough, a time-lapse of sixty years between a book's conception and its completion is no big deal. Persistence pays. Meanwhile, the great Chinese revolution has preoccupied our attention. This revolution set out to get rid of imperialism and modernize China. Only in its recent phase of consolidation have the Chinese found it useful to revive certain administrative structures of a century ago, among them some kin to the Customs Service. As of 1988, fourteen coastal and riverine ports have been designated as special places for foreign trade. All these places were treaty ports in the days of the unequal treaties. To them are added
five Special Economic Zones, where foreign participation in Chinese economic life is especially facilitated. H.B. Morse today would recognize many perduing features of China’s intercourse with the outside world. The persistence of such features highlights the great transformations that have occurred. China is constantly changing, but with much inertial momentum.

What brought me back to Dr. Morse a few years ago was my good fortune in finding colleagues with whose help I could publish the letters of Robert Hart to his London agent, J.D. Campbell (2 vols., 1975), and then Hart’s journals from 1854 to 1866 (2 vols., 1986 and 1991). Since Morse was one of Hart’s principal American commissioners, I have felt better prepared to study his career.

A reader will note at once that I share with the subject of this biography three abiding concerns: Harvard, the Customs Service, and China’s modern history. Since we have so much in common, the reader may well go on to wonder if these two historians share also certain predilections and blind spots. This should be assumed. Yet Dr. Morse and I, though we overlapped, were born in 1855 and 1907 respectively and so lived a half century apart. Readers born in still another half century, in the 1950s or later, will be in a position to discern both continuities and discontinuities through these three half centuries. Perhaps they will be able to decide whether our grasp of reality through scholarship can rise above culture, or be genuinely advanced by material growth and the progress of technology. Such questions, however, need not be answered. A biography reports on a life. It settles few issues.
Origins and Education
1855–1874

Hosea Ballou Morse came from Puritan stock. Descended from seventeenth-century New England ancestors, the fifth-generation Nova Scotian returned as a youth with his family to live in Medford, Massachusetts, near Boston, and later became a loyal Harvard graduate of 1874. Morse apparently retained an inward sense of himself as an American, although he lived almost all his life outside the United States: first in Nova Scotia, for nine and a half years; later in China, for thirty-three and a half years; and finally in England, for twenty-six years until his death in 1934. He resided in the United States for less than a decade—mainly as a student at the Boston Latin School and then Harvard College. Morse was successively a Nova Scotian and a British subject, a naturalized U.S. citizen, and then again a British subject during his later years in England. This variety of both residence and identity suggests that he was not firmly attached to any one place, something like the present-day members of the Foreign Service or of transnational corporations. In Morse’s era, those who were so uprooted were missionaries, merchants, and administrators of European colonies. For Morse, the Harvard Class of 1874 served as his psychological home base, to which he returned at reunions and reported in the meantime.

Family Background

H.B. Morse’s early ancestor, Samuel Morse, immigrated from Dedham in the county of Suffolk, England, to the Massachusetts Bay Colony in 1635. The following year his name appeared third on a list of 125 who founded the town of Dedham, Massachusetts. For more than a century Samuel Morse’s descendants stayed in Massachusetts, but during the latter part of
the eighteenth century they emigrated to Nova Scotia. According to Morse family lore, Hosea's great-great-grandfather Abner Morse (1731–1803) was a Loyalist who in the hectic days of 1776, when General Washington invested Boston, "judged it expedient, and much safer" (so H.B. Morse put it in 1931) to decamp with Sir William Howe to Halifax. As his Uncle William wrote to Hosea, "perchance he preferred having his friends say 'Abner is scared' in lieu of saying 'how nachal [natural] he looks.' " Abner allegedly obtained a commission in the Loyal Legion as well as a grant of land.

In fact, nothing of the sort happened. Abner Morse was merely a settler recruited in 1760 by the British in Nova Scotia to take over farmland once occupied by French-speaking Roman Catholic Acadians, who had been evicted during the war with France for their refusal to take an oath of allegiance to the British Crown. During the 1750s land had become a scarce commodity in southeastern Massachusetts as well as parts of Rhode Island and Connecticut. Consequently, when potential settlers were offered one hundred acres or more if they would move to Nova Scotia, the prospect proved irresistibly enticing. Abner and his wife, Anna Church Morse (1737–1811), along with her father, Abner's younger brother, Samuel, and forty other families, embarked in Boston on the Charming Molly. They arrived in Annapolis Royal on May 17, 1760, with "some livestock and utensils for the farms." 

Annapolis Royal was, and is, a picturesque town located on the Bay of Fundy opposite what is now New Brunswick. The settlers, known also as "planters," made their new homes "on the goodly acres of the expatriated Acadians"—only a few of whom still remained there. The Morse contingent settled fourteen miles up the valley at Bridgetown "at the head of navigation on the river . . . in the midst of a favored farming district." Abner's descendants, a respectable group who kept primarily to farming, intermarried chiefly among other settler families and remained in Bridgetown for several generations.

The outbreak of the American Revolution created political as well as psychological difficulties for these settler-planters from New England. Annapolis Royal was the former capital of the province, and a great many pro-British Loyalists had fled there from Massachusetts and other areas. Yet in a social, religious, and economic sense, "the Yankee [settler] section of Nova Scotia retained very close ties with New England." In fact, most planters, as former New Englanders, sympathized with the American colonists. At the same time, they were unable to participate in the war on the American side, since the British maintained a highly authoritarian govern-
ment backed by powerful military forces. Although every township with more than fifty families could send two representatives to the newly founded Legislative Assembly in Halifax, in reality it was an impotent body. The Americans, accustomed to self-government, chafed at their lack of a meaningful voice in provincial politics.¹⁰

The exact role of the Morse family in this confused history remains unclear. But this much we know: Abner Morse Jr., eldest brother of Hosea’s great-grandfather, David Chipman Morse (1777-1843), is called “Capt. Abner” on his gravestone.¹¹ Perhaps, then, he served in the British forces. If so, this might help to explain the family Loyalist tradition. Of course it is also true that a good deal more prestige was attached to being a Loyalist than a land-hungry farmer. In any event, after the conclusion of the Revolutionary War, the Morses and other Nova Scotia Yankees settled down as part of the British Empire, while still maintaining strong emotional ties to Massachusetts. Hosea’s grandfather, Constant Church Morse (1800–1880), remained in Bridgetown and became a “maker of boots and shoes” as a means of supplementing his meager income from farming. His wife, Frances Sangster Morse (1810–83), was the daughter of a Scottish immigrant who had been a hotel keeper and farmer in Nova Scotia.¹²

Hosea’s father, Albert David Morse (1832–1900), also learned to work both leather and the land. He lived in several parts of Nova Scotia before establishing his home in South Brookfield, a charming village on the small River Mersey about halfway between Annapolis Royal on the Bay of Fundy (known locally as “in the valley”) and Liverpool, the county town of Queens County, on the Atlantic coast. Hosea later remembered Brookfield as “a small hamlet of half a dozen houses, with the farmers’ houses dotting the country around.”¹³ During the early 1850s “Indians yet roved and hunted” in the area, and much of the land remained uncharted. Scenic lakes teemed with fish, including excellent salmon. Moose, caribou, and bears lived in the woods, along with game birds such as wild ducks and geese. The principal occupations for settlers were lumbering and farming.¹⁴

It was here that Albert met and married Mercy Dexter Park of Port Medway, Queens County, Nova Scotia. Mercy’s grandfather, James Park (or Parks)¹⁵, came to the province from Ireland in 1769, presumably to better himself, since none of these Irish Protestant immigrants was indentured. James and his son Matthew S. Parks both served as trustees of the English School, and Matthew (Hosea’s maternal grandfather) was also collector of rates and constable. In 1859 Matthew became master of a forty-three-ton schooner, the Herald. His second wife, Lydia Dexter, was the widow of
Benjamin Freeman. Her father, Isaac, had been a leader in both the New Light Revival of 1783 and the beginning of the Baptist church nearly forty years later.\textsuperscript{16} This brief history suggests that Hosea’s maternal relatives were more prosperous than those on his father’s side.

Albert and Mercy got married on July 5, 1854. By this time, the pioneer village of Brookfield had grown to include “a sawmill, cooperage and a giant grist mill. The latter, built by Capt. Josiah Smith, a notable first settler, was taking in the never-ceasing flow of grain and turning out the wholesome whole wheat flour and oatmeal. The saw mill and cooperage were prospering and some sort of highway connected Brookfield with the town of Liverpool, 30 miles away.” In Hosea’s boyhood, this simple environment must have provided a comfortable and friendly existence. He remembered it fondly and returned there periodically in his high school years for a “visit to old haunts, a feast of native blueberries, [and] a joke with friends.”\textsuperscript{17}

The Universalist church played a significant role in the early married life of Albert and Mercy Morse. Established in mid-eighteenth-century America, with roots in both English Protestantism and German pietism, the Universalist faith centered on a belief in the salvation of all souls, in sharp contrast to the “stern and selective emphasis of Calvinism, with its doctrine of the ‘elect’ and its eternal damnation and hellfire.”\textsuperscript{18} By the end of the century, the eminent preacher Hosea Ballou (1772–1852), known as the Father of American Universalism, had introduced into his teachings a Unitarian concept of God, a radical reinterpretation of atonement, and an emphasis on reason in religion. Ballou’s was a gentle faith. In the words of his youngest son, Maturin, he preached “love while others [i.e., the Calvinists] preached wrath to the people.”\textsuperscript{19}

By 1794 Ballou had established his own church. His book of 1805, \textit{A Treatise on Atonement}, put him on the theological map, and by 1817 he had become minister of the Second Universalist Society in Boston. In 1840 there were seven hundred Universalist societies in the United States and Canada, and by 1852 they had a total of eight hundred thousand adherents. Although initially identified with rural areas and lower-class, uneducated, itinerant preachers, as time passed Universalism became more urban and respectable.\textsuperscript{20} Hosea Ballou II, great-nephew of the founder, became president of Tufts College in 1853, the year after its establishment. He was also a Harvard overseer, having taken the place of the well-known Unitarian William Ellery Channing.

The Universalists found their way to Halifax, Nova Scotia, in the
mid-1830s, and by the 1860s the local membership included a number of people who had attained wealth and a measure of prominence in business and shipping. There is no record that Albert and Mercy Morse were actual members of the church, but they were certainly affiliated. They also knew of the fame of Hosea Ballou through the legacy of Captain Josiah Smith of Brookfield, who had met Ballou in Massachusetts and had been greatly impressed by him and his teachings. Thus when Mercy gave birth to her first child on July 18, 1855, it must have seemed natural to name him Hosea Ballou Morse. Morse remarked many years later: “In regards Hosea Ballou I plead not guilty. In the first half of the nineteenth century all good Americans had the laudable habit of naming their sons after their hero of the moment. In my generation I suppose there were 100,000 G. Washingtons, 10,000 B. Franklins and 5,000 Lafayettes.” On March 18, 1857, Hosea and his brother Sylvester Ernest Morse (1857-1907) were baptized by the Reverend A. Jarden, an Episcopal missionary. At their parents’ request, the baptisms were entered in the records of the Universalist Church in Halifax.

We know comparatively little of H.B. Morse’s early life. He had three younger siblings—Sylvester Ernest, Harvie Black (1858-1915), and Albert (1864-?), but none of the three attained the levels of education and professional distinction that Hosea did. The brothers thus had little in common with him, and apparently Morse had minimal if any contact with them in later years. He was, however, close to several cousins, including the children of his maternal aunt, Letitia, who married a carpenter by the name of Richard Bryden. Hosea was born in part of the Bryden house, since the Morses lived there for a time. Later the Brydens followed the Morses to Medford, Massachusetts, and Hosea kept in touch sporadically with this branch of the family throughout his life. He also maintained contact with at least two other sets of cousins (his mother had twelve siblings in all); one of these cousins, Dr. Freeman Park Smith, informs us that Hosea stayed with the Smith family during his Harvard vacations and continued to correspond with his Smith cousins for awhile after going to China.

In short, Hosea spent his early childhood surrounded by a supportive extended family in a close-knit village. But he did not remain there long. About the time he entered school, Albert, Hosea’s father, moved the family to Halifax. There Albert Sr. became a member of the firm of Harley, Verge and Morse, dealing in leather. This move to Halifax broadened young Hosea’s horizons. Instead of a village, he now found himself in the capital
city of a British province, at the vortex of various international conflicts, past and present. He entered the Free Church Academy on Gerrish Street, and there developed a lifelong passion for books. A former neighbor noted that Morse "showed such love for study, that his mother, fearing the effect upon his health, from such close application, sought to divert his mind in various ways. But little Hosea Bellew [Ballou] preferred his books to play." Indeed, reading became a principal form of recreation. In addition to his studies, Morse reveled in adventure stories—particularly a "canoe travel book," which he later described as "the joy of my youth."

The move to Halifax also brought the Morse family more firmly into the orbit of the Universalist church. We know, for instance, that Mr. Morse attended a pewholders' meeting as early as 1863. Hosea, although only eight at the time, possessed an intelligent and inquisitive mind and may already have taken an interest in the family faith. Universalism, after all, had a well-defined worldview. It was a nonexclusionary religion whose adherents strongly opposed slavery and racial prejudice. The Universalists also rejected drink and capital punishment and had socially advanced views about issues such as penal reform, peace, and women's rights. They were in principle against war and placed their hopes in negotiation, since they believed in the possibility of the inward reform of all people.

The Universalists had a powerful interest in education. In founding institutions such as Tufts College, St. Lawrence University, Goddard College, and what became the California Institute of Technology, they placed as much emphasis on science and engineering as on moral education and the classics in their curricula. They enthusiastically accepted Darwin, and put coeducation into practice long before it was common. Hosea's parents' Universalist background probably encouraged them to support his liberal education.

The Morse family's connection to the local Universalist church may also have played a role in their sudden departure from Nova Scotia. That province was passionately pro-South in the American Civil War, and Haligonians made a good business out of provisioning the blockade runners to southern ports. But the Universalists, being abolitionists, were pro-North. Their cause was championed by the Morses' Halifax minister, the Reverend Nathaniel Gunnison, a New Hampshire man. Records filed in the regional office of the U.S. National Archives for 1867–68 indicate that Albert Morse went bankrupt just before he left Halifax. At the time of his petition his total worth amounted to only three hundred dollars in kitchen and household property. Quite possibly he failed because the local citizenry, hostile to his political views, avoided patronizing his establishment. On the other hand,
At all events, an enormous number of Nova Scotians decamped to Massachusetts in the latter 1860s and the 1870s. According to the 1880 U.S. census, over twenty-nine thousand of them lived in Massachusetts—about a third in Boston. The Morses were far from alone in returning to New England. Albert and his family reached Boston on January 1, 1865, three months before the end of the Civil War. Hosea was nine and a half. Sixty-seven years later he could still visualize “my first arrival in Boston Harbor and my train journey to Medford, six miles out.” Medford, a town of about five thousand people, was a pleasant place, despite its description at the time as “one third swamp and two thirds rock.” It had once been a major shipbuilding town, but the coming of the railroads had all but put the old Middlesex Canal out of business by 1853. Only two boats went down the ways into the Mystic River in 1869, with a final one in 1873. When the Morses arrived, the town’s two major commercial establishments were Medford Rum and the brick works, which employed hundreds of French Canadians. The First Universalist Society on Forest Street turned out to be one of the oldest churches in town.

Hosea entered the Medford public schools, where classes started each day with a Bible reading followed by the Lord’s Prayer and, on occasion, the Ten Commandments. Discipline was strict. School lasted until the last Friday in July, with only Wednesday and Saturday after­noons off. Pupils studied reading and grammar, arithmetic, geography, U.S. history, and probably Latin in later grades. In 1866, at the age of eleven, Hosea was ready to enter the ninth grade, but since the high school in Medford did not initiate a full college preparatory program until 1867, his family decided that he should go instead to the Boston Latin School (BLS), then the best public preparatory school in the area and one of the best in the country. Apparently he was ready for the move. According to a story preserved in local folklore and fondly repeated in the February 6, 1926, edition of the Halifax Herald, Hosea returned with his family to Brookfield for a visit in 1867. At that time a resident physician, “hearing of the boy’s ability, decided to test his knowledge of Latin. The boy answered questions promptly and incidently went one better than his questioner; who retired quite satisfied, remarking that the child could teach him Latin.”
Boston Latin School and Harvard College

Founded one year before Harvard, in 1635, BLS had long been a training ground for scholars and public leaders. Among its many distinguished graduates were Benjamin Franklin, Samuel Adams, and Ralph Waldo Emerson.44 When Morse entered BLS, the school occupied a large square building on Bedford Street, where from nine to two on weekdays and nine to one on Saturdays about three hundred boys underwent the most rigorous scholarly training available in America. Charles William Eliot, president of Harvard from 1869 to 1909, recalled that when he entered BLS in 1834, “the subjects of instruction were Latin, Greek, mathematics, English composition and declamation and the elements of Greek and Roman history. There was no formal instruction in the English language and literature, no modern language [French in Morse’s time was a later addition], no science and no physical training or military drill. In short, the subjects of instruction were what they had been for 200 years.”45 The school’s leaders also believed in cast-iron discipline. Twelve prizes were awarded annually for exemplary conduct and punctuality. Eliot reminisced: “When I was a boy . . . the control used [in BLS] was physical force, the application of torture—that is the long and short of it.”46 Caning the students was one of the instructor’s regular duties.47

Morse entered the ninth grade at the Boston Latin School for a four-year short course in September 1866. At the time he was still a British subject. Only in the autumn of his senior year, on November 1, 1869, did he and his family become naturalized citizens of the United States.48 BLS imposed conditions on Hosea’s initial entry, perhaps because his course work at Halifax had been different from that in the United States, or possibly because the Medford schools were not up to the standard of those in Boston. These qualifications proved unnecessary, however. From the beginning Morse excelled in his studies.

Presumably Hosea commuted by train with his father, who was then employed in Boston in the wholesale leather, boot, and shoe business, as he had been in Halifax. At first a clerk, by 1870 he had become a salesman at one of a group of firms at 57 Hanover Street, Boston.49 Meanwhile his son flourished at BLS, getting good grades and making new friends. One of the most colorful of his acquaintances was Giorgio Anacleto Conrado Bendelari, soon to become Giorgio A. Bendelari and then “George.” Giorgio’s father, August, had been an Italian revolutionary in 1848, and in 1854 he brought his entire family to the Dorchester section of Boston. Interested in
music and painting, Giorgio opened a window on the world of Italian culture to Hosea. Both boys were "foreigners," and both proved to be able students. Although Giorgio did not share Morse's strict study habits, the two formed a fast friendship, and they roomed together all four years at Harvard.  

Two other BLS friends also remained close at Harvard: John Palmer Wyman Jr. and Samuel Edwin Wyman, identical twins from West Cambridge, near the border of Medford. Unlike Bendalari and Morse, the Wymans boasted generations of unbroken local roots. Their father, John Palmer Wyman Sr., was an active and successful farmer who had put himself through Harvard in his mid-twenties by blacksmithing. His obituary in 1891 noted that he was "a man of great personal force, unwavering integrity, broad culture and fine literary perception." Apparently his sons inherited at least some of these qualities. John Jr., eventually a local lawyer, stood high at BLS, but he did less well at Harvard, where his warm nature and beautiful baritone voice created demands on him to participate in many social events. Edwin, less distracted by such attentions, was a friendly academic rival of Morse's at both institutions. He became a doctor, trained in Europe.  

Supported and inspired by such friends, Hosea thrived in the tough BLS environment. As one of only eight members of his graduating class (including Bendalari and the Wyman twins) to receive the coveted Franklin Medal for scholastic achievement, Morse was able to enter Harvard without condition in spite of his youth: he had just turned fifteen and would be the second youngest freshman at the college. Of the thirty-one BLS graduates, twenty-three went to Harvard. BLS was so much an antechamber to the college that graduation exercises ended at both places with the singing of "Fair Harvard."  

The freshman class entering in 1870 was the largest ever. Of the 251 students who applied, 213 were admitted—forty-two without condition. By graduation their number had dropped to 163. Almost all of Morse's classmates came from New England or New York, and about a third had graduated from public high schools. More than 50 percent of the fathers of these graduating students were in business, and about 30 percent worked in the professions. Sixty-five of Morse's classmates were Unitarians, thirty-eight were Episcopalians, and nineteen were Congregationalists—75 percent of the class. Only three, Hosea presumably among them, were Universalists. Thus, from the standpoint of both his family background and religious orientation, Morse was well out of the Harvard mainstream. Yet by applying himself academically he won acceptance and success. This, in turn, built his self-confidence.
Harvard tuition in 1870 was $150 a year, the highest in the United States at the time. Other expenses brought the annual outlay up to about $450. Scholarships, averaging more than half the total yearly cost, were available, but apparently Morse did not need one. Although his father had been forced to declare bankruptcy at the end of 1867, he subsequently prospered—at least temporarily. In the early 1870s Albert Morse acquired a considerable amount of property, including a house and stable on South Street just across the Mystic River from the Medford town center. By 1875 he had become successful enough to start his own firm of Morse and Woodbury at 125 Summer Street.

After passing his entrance exams at Harvard, Hosea signed a bond for $600.00 to indemnify the college for any default in his payment of term bills, property damage, and the like. In March 1871 his first term bill charged him $100.00 for instruction, $14.67 for rent and care of his room at Hollis Hall, $1.07 for “average of special repairs,” and $94.86 for board at the Thayer Club—the commons subsidized by Nathaniel Thayer and others, including the College Corporation. Nearly 250 dormitory rooms were available to the entire college at rents ranging from $40.00 to $200.00 per year. Of these, about half went only to “chums” (roommates). Morse’s chum in Hollis was, of course, his good friend from BLS, Giorgio (now George) Bendelari.

High thinking accompanied very plain living at Harvard. Even in “the much coveted Holworthy Hall” there were no bathrooms or even water lines to the living quarters. One of Morse’s classmates later remarked: “The water supply was in the basement and cold water only at that. . . . There was no heat in the hallways, so our rooms were often very cold, having only, for both [the] study and the two bedrooms, one open fireplace, over which in very cold weather we huddled in our overcoats.” Upon entering Harvard Yard through the snow, mud, or dust of the appropriate season, one found a growing cluster of buildings: classrooms, a chemistry lab, dormitories, and the administration building, University Hall. President John Thornton Kirkland (1810–28) had cleared up the inner Yard behind University Hall, the present Tercentenary Theater, “which before his time was a hodge podge of pig pens, sheep commons, breweries and scattered privies.” In this noisy, smelly dump area, Kirkland built a neat row of new privies (“university minor,” the students called it) behind a screen of newly planted pine trees.

Entering Harvard in 1870, Morse joined the second class to graduate wholly under the presidency of Charles William Eliot. At the time Eliot
was leading a quiet but creative revolution in American higher education that would turn Harvard into a modern university. His renowned elective system and other innovations were undoubtedly in the air, and although Morse was not fully exposed to the changes, the new spirit of intellectual adventure on a frontier of learning must have reached the talented student body.

Before Eliot’s appointment in 1869, Harvard—like other New England colleges—had been essentially a continuation of schooling for older boys, with an academic level that remained closer to high school than college. The prescribed curriculum stressed only the classics and mathematics. Members of each class studied the same things in the same progression, with a great deal of memorizing and little need to use a library. Earlier Harvard presidents spent most of their time on disciplinary matters. There was no tutoring and very little contact between the few dozen faculty members and the students. The professors spent most of their time either lecturing in a set fashion or grading examinations and compositions. Any research they might undertake was at their own cost in time and effort. Meanwhile, the schools of law and medicine existed mainly as unprofessional places of apprenticeship to practitioners. There was no graduate school of arts and sciences until 1872 nor any library facilities that could have nourished one.

Under Eliot all this began to change. Scion of an old Boston family, he had gone into chemistry, assisting Wolcott Gibbs, one of the founders of the field in the United States. But after being passed over for an appointment at Harvard, he helped to form the new Massachusetts Institute of Technology in 1865 and then spent two years in Europe, where he observed firsthand the advanced systems of higher education there. Eliot’s greatest gift, according to Henry James II, was for the understanding and management of institutions. Indeed, he managed to work wonders at Harvard.61

His first steps were practical. He appointed a dean of the college, who devoted himself to the maintenance of discipline that had so preoccupied previous presidents. The results rapidly became evident to the Class of 1874. Hazing was first modified and then forbidden in 1871. In fact, the faculty itself intervened directly when the 1874 sophomores tried to have their traditional “Bloody Monday” fight with the freshmen.62 Meanwhile, graduate study, including that of law and medicine, became professionalized. The degrees of Doctor of Philosophy and Doctor of Science were inaugurated, and the Master of Arts was made into an actual measurement of achievement—not something automatically conferred for a fee after a
few years. Since traditionally Harvard graduate courses were (and are) open to qualified upperclassmen, these reforms added greatly to undergraduate opportunities.

Eliot believed that Harvard’s task was to produce an elite to lead mankind, or at least that portion of it so fortunate as to be in the United States. To do this required creating a first-class faculty. In 1869, 45 teachers of professorial rank taught 570 college students. Eliot immediately brought in a number of innovative teachers who would eventually develop new fields, and his judgment in these appointments proved excellent.63

What was young Morse’s intellectual experience in this setting? Did he undergo a great awakening to the vast and exciting worlds of literature, ideas, and modern science? Apparently not. Looking back on his Harvard education in 1931, he wrote:

Eliot’s experimental class . . . had no electives in freshman year, a scanty allowance in sophomore and about half in junior year with an extra allowance (3 hours if I remember rightly) for those who had taken second year honors; then in senior year all our courses were elective except compulsory themes, whose place was taken by my honors thesis. Prayers were compulsory and began the day before breakfast (at 6:45 A.M., but from Nov. 15 to March 1 at 7:45) and we were summoned to them by the bell on Harvard (Hall) rung by the aged hand of Jones. Many a man was a sluggard through the first bell, jumped out of bed at the second, threw an ulster over his nightshirt (pyjamas had not then come from the East) and raced to prayers through possibly the slush of a winter morning. Compulsory prayers led to much bad language. After breakfast at 8, the Tabular View laid down the hours of lectures and recitations from 9 to 1 and (on 5 days) from 2 to 5 . . . . Gymnasium was entirely voluntary.64

School was not all demanding drudgery, however. Morse’s classmate and future financial adviser, Richard Henry Dana III, son of the well-known author of *Two Years before the Mast* and an accomplished undergraduate oarsman in his own right, emphasized the lighter side of Harvard life. In a journal entry for June 19, 1874, he wrote: “Days in college were happy-go-lucky times, even for the more studious and athletic.”65

Morse certainly fell more into the former category than the latter. Although quick and agile, he was only five feet six—one of the seven shortest members of his graduating class. He was also three or four years
younger than the class average. Perhaps for these reasons, not to mention his preoccupation with studies, Morse did not play intercollegiate sports. His college scrapbook does, however, contain many clippings that refer to rowing (which he would do later at Shanghai) and to Harvard's baseball games with the Boston Red Stockings. Another cultural interest that went with him from the Yard to the Chinese treaty ports was "Private Theatricals" such as *Fra Diavolo*, "Byron's best Burlesque," performed at Harvard in 1873.66 As with athletics, Hosea remained an observer rather than a participant in theatricals during his college years.

Morse was first and foremost a student. His scrapbook tells the inspiring story. It consists for the most part of examination papers and grades (but no answers) for subjects such as geometry, algebra, Latin, Greek, French, and German. Some of his assignments were specific: "Give a synopsis of the Future and Aorist Middle of (in all the moods) and inflect the Optative of each"; "Reduce 179487 to the product of its prime factors." Other assignments could be quite general. For ancient history and geography he had simply to "Describe Athens."67

For the most part, Morse at Harvard did more intensively what he had already done at the Boston Latin School. But he continued to do it well. In his Latin translation of November 1870, for example, he scored 89 points out of 96, the highest grade in the class. In Greek (December 1870) he got 81 out of 96 and then 115 out of 136. In French (February 1871) he managed 89 percent—again, the highest in the class. At the end of his first year Morse stood third among the 163 freshmen, with an average grade of 88.7 percent. In his junior year he became one of the first eight Harvard students chosen for Phi Beta Kappa out of a total of twenty-five from his class. At graduation, he took "a First Class (Summos Honores)" in classics as well as honors in mathematics.68

The professors with whom Morse had the most contact at Harvard were George Herbert Palmer, George Martin Lane, and William Watson Goodwin. Palmer in 1871 was a tutor in Greek, Lane served as the Pope Professor of Latin, and Goodwin was the Eliot Professor of Greek Literature. Together these three men gave Morse a solid classical background. Indeed, throughout his life he remained, in his own words, "a classicist at heart."69 Harvard gave him little formal philosophy, however. Although William James began teaching there in 1872, Morse did not study with him. Nor did Hosea taste much of the give-and-take sense of adventure with which the European specialist Henry Adams, who "knew enough to be ignorant," was ensnaring a small elite in historical research.70 Morse's lack
of social connections, which his classmates like Dana possessed, may have made him somewhat shy about trying to join in.

What, then, did Harvard do for young Hosea? Above all, it provided him with a first-class liberal education. In 1924 a mature Morse wrote that the best definition he had ever heard of a “liberal education” was one “which is of no darned use in earning one’s bread; and that is the education which I think is the most worth. It is what the Boston Latin School and Harvard gave me, and what was the most worth in making of me such as I am—as much or as little as that may be.” We may surmise that Morse’s Harvard education also contributed in a more concrete way to his later success. Certainly his diligent work on the Greek and Roman classics with Palmer, Lane, and Goodwin helped prepare him to deal with Chinese mandarins who were even more rigorously trained in their own classical tradition. Such work had earlier prepared the inspector-general of customs, Robert Hart, for his long and distinguished service as a Ch’ing dynasty official. No doubt Morse’s training in Greek and Latin contributed to the balance and eloquence of his historical writing in later years, just as his skill in mathematics would contribute to his becoming the Customs Service’s statistical secretary at the end of 1903. His French turned out to be vital in his South China posts.

From a social standpoint, Morse’s education at the Boston Latin School and Harvard marked a decisive step away from his immediate family background. His parents and brothers, having received no higher education, seem to have remained in nonprofessional jobs in trade or farming all their lives. Hosea, in contrast, began to develop ever broader cultural horizons and to move in ever more sophisticated intellectual and social circles. Aside from his parents, the family members with whom he maintained closest contact entered fields such as law, medicine, and education. His friends and associates in later life included classmates like the wellborn Richard Henry Dana III and leaders in government, mercantile capitalism, and scholarship. Without his prestigious Harvard education, Morse would not have developed the valuable social and professional associations he did. They, in turn, provided him with the framework, the interests, and the support that enriched his life and the lives of those around him.
Entering China’s Service
1874–1877

Morse’s recruitment into the Chinese Imperial Maritime Customs Service during the spring of his senior year at Harvard decided the course of his adult life. It was effected by Edward Bangs Drew, who graduated from Harvard in 1863, eleven years ahead of Morse. Drew had become one of Inspector-General (I.G.) Robert Hart’s first American commissioners. Getting in on the ground floor of the Customs Service in 1863 and blessed with a warm and charming personality, not to mention great administrative talents, Drew rose within three years to commissioner status—something later recruits would achieve only after about twenty years of service. Drew served as a guiding spirit to Morse in China and a supportive friend after Morse’s retirement.

Appointment to Customs

Drew was in Cambridge at the fortuitous moment when Hart needed him there. As part of his strategy to attract talent, Hart began to give his officers two years’ leave at half pay, ordinarily after every six years of service. Drew got his leave in 1872. Because he had been representing the Chinese Customs in Vienna at an Austro-Hungarian Exposition for seven months in 1873, his leave was extended to autumn of the following year. As a result, Drew was still in Cambridge in the spring of 1874 and was about to marry Anna Davis. She eventually bore five of their six children in China and became a main support to many in the Customs Service.1

Taking advantage of Drew’s proximity to several of the major U.S. universities, Hart wrote him in March 1874 that he wanted three Americans aged between nineteen and twenty-three, “fairly healthy” and with no “lameness, stammering, deafness or bad sight,” who had received a “fairly liberal education” and could “write a fairly good clerkly hand and... cipher
quickly and correctly." 2 Legible handwriting was a necessity since typewriting had not yet become commonplace. 3 Drew notified students at Harvard, Brown, and the Massachusetts Institute of Technology of this opening. 4

The Magenta, a predecessor of the Harvard Crimson, reported that Morse, Charles Cecil Clarke, and William Franklin Spinney (known as Frank) were selected by Drew out of “some twenty applications by Harvard men to vacancies in the Foreign Customs Service of the Chinese government.” 5 The principal of the Boston Latin School, when queried about Morse’s qualifications, told Drew, “You couldn’t get a better man.” 6 Subsequently, when Hart asked Drew to select a fourth man, he chose Henry Ferdinand Merrill. These four were all cum laude and Phi Beta Kappa graduates of the Harvard Class of 1874, and Merrill and Morse ranked among the top twelve in the class. Like Morse, Merrill went on to have a distinguished Customs Service career. Clarke and Spinney led quieter lives. These four young men had been companions in college and evidently took on their new opportunity as a common venture. Indeed, Merrill’s daughter reported later that in China they were always known as “The Four,” and they “remained close friends throughout their whole career in the Service.” 7 Clarke had attended Cambridge High and Latin School with Merrill, whereas Spinney was a Salem High School classmate of Ernest Fenollosa, who would become a famous Japanologist. 8

One can imagine Drew telling the four fresh-faced youths about life in China, the foreigners’ prerogatives, the need of rectitude, and the prospects of promotion in the Customs Service that they were joining. There was no lack of opportunity for adventure and advancement in this worthy cause—witness his own success.

Robert Hart’s official letter of May 19, 1874, appointed Morse to a fourth-class clerkship B at a salary of nine hundred taels per year. The financial terms were not bad for that period. Morse’s salary amounted to fifteen hundred U.S. dollars, since three Customs taels (lit., ounces of silver) were worth roughly one pound sterling or five U.S. dollars. In addition, Hart’s letter provided Morse with six hundred Customs taels for passage and outfit money. The I.G. set August 20 as the starting date in Shanghai. Solemnly, Morse had to subscribe his signature, witnessed by Drew and Clarke, to eight stringent rules of service, four of which began “The Inspector General is at liberty. . . .” Hart could change the rules and discharge, transfer, or discipline the employee. Within the Customs Service the I.G. was the only one held responsible by the Chinese government. All others on the staff were responsible only to him. 9
Morse made up his mind to accept this position after ten days' consideration. He was not yet nineteen.

What induced Morse and his classmates to go to China? One factor was undoubtedly the good salary. Another seems to have been the exotic appeal of the self-styled "Middle Kingdom." Certainly all of the recruits would have heard countless stories of adventure and intrigue in the mysterious Far East, for Boston and Salem, both near Cambridge, had long been heavily involved with the China trade. Even after Sino-American commercial relations began to decline during the Civil War, a number of local people continued to have China connections—among them the families of Harvard classmates Richard Henry Dana III and Frederic Cunningham. Dana's famous father went to China when Dick was a boy, and Edward, Frederic's father, had been an officer of the great shipping firm of Russell and Company as well as U.S. consul at Shanghai during the China trade years. In the 1870s, of course, Americans were also heading west—the road to opportunity. Viewed from this angle, going to China was simply a continuation of the westward movement. In fact, in 1880 Hosea's parents and brothers moved to Omaha, Nebraska. There, Albert managed the A.D. Morse shoe store, adopting as his stationery motto "Old reliable one price

A child can buy as cheap as a man." By this time Hosea, now having lived six years in China, had invested together with his three brothers in a twenty-four-hundred-acre sheep ranch in Ellsworth, Kansas.

Morse's extant writings do not reveal his motives in accepting the Customs Service position, but it is evident that the exciting times, his own early experiences, and his natural curiosity and financial needs all coalesced with a fortuitous China-based opportunity. We have seen that as a youth he loved adventure (or at least adventure stories), and we may assume that his experiences in both Halifax and Medford during the American Civil War gave him a distinctly international perspective on the conflict, as well as a lifelong intellectual interest in it. His Nova Scotia background in particular must have made him acutely aware of the power and influence of the British Empire throughout the world.

Having made his decision to accept a post in the Chinese Customs, Hosea went on to finish his courses and graduate in June from Harvard. Commencement featured the dedication of Memorial Hall, built to honor those who had lost their lives in the Civil War. Charles Francis Adams's address called for no exultation but postwar reconciliation, a note that must have had particular meaning to Morse, with his knowledge of both sides of the conflict. A choir of two hundred sang the ode by Oliver Wendell Holmes Sr.: "Their hopes with
rainbow hues were bright—How swiftly winged the sudden night!” As though in counterpoint, the dinner for one thousand, “the largest commencement dinner ever set in the United States,” was terrible—chaotically served and with “a paucity of viands.”\(^{14}\) Never mind—undergraduates learn to tolerate mediocre food, and the occasion was still highly memorable.

Traveling to China

Morse, Clarke, and Spinney, the three initial recruits, started west on July 5. Merrill would follow several weeks later. After ten days of railroading, they arrived in San Francisco. The American West was in the process of being opened and built up by the coming of the Union Pacific and Central Pacific railroad lines, which had aroused worldwide interest as a symbol of American development. Homesteaders’ agriculture was encroaching on the open range, and the Indian wars were not yet over: two years later Sitting Bull’s Sioux warriors wiped out General Custer. The West was still wild.\(^ {15}\)

On the other hand, hope for the future abounded. When *The Great Transcontinental Tourist’s Guide* of 1870 described the five hundred stops or other sites on the two railroad lines, it observed that “an incalculable wealth of trade” had been opened and that “the East and West are now connected by a route over which the vast trade of China, Japan and the Orient must flow in its transit eastward. The benefits to be derived from this and other sources connected with the road, as yet, are but dimly shadowed forth.” The guide went on to predict the day “when the old channel of commerce between the East and the West shall have been fairly broken, and its tide turned through the new channel.”\(^ {16}\) Not surprisingly, New Englanders who had acquired wealth in the China trade were among those who added to their fortunes by subsequently investing in western railroad development.

As Morse and his companions rolled west from Chicago, they crossed the Mississippi at Burlington, Iowa, and then the Missouri River on the new half-mile-long bridge at Council Bluffs, Iowa, in order to reach Omaha, Nebraska. Morse may already have had relatives there, but he did not stop to visit.\(^ {17}\) From that point the three young men traveled the Union Pacific line on through Nebraska and southern Wyoming to Ogden, Utah. Only five years before, on May 10, 1869, the Union Pacific had met the Central Pacific line coming from Sacramento, California, to conclude the historic achievement of crossing the continent. The railroad provided a fast, safe method of traversing the route west to Ogden and the Great Salt Lake that in earlier days had been crossed by wagon trains and by the mail riders of the Pony Express.\(^ {18}\)
The travel had not been exhausting. Scheduled stops of about half an hour were made for meals roughly every five hours. As civil servants of China traveling on allowances, it is probable the Harvard recruits rode west in one of George M. Pullman’s sleeping cars. Developed in the 1860s, these cars featured sections of two facing cushioned seats by day that were adjusted to make a lower berth at night, while the upper berth folded out and down from the wall above the windows. First-class passengers could also use the Pullman Palace Dining Car.

From Ogden, Morse and his companions went north via the town of Carlin, Nevada, and across the mountains to Sacramento. The capital of California was a railroad junction center. From there it was only 139 miles to the terminus in Oakland, California, from which one took a ferry across the harbor to San Francisco. The Daily Alta California, San Francisco’s leading paper, reported on July 14, 1874, that “Messrs. Clarke, Morse and Spinney had passed through Carlin by train on July 13” and so would reach San Francisco, 580 miles away, on the fourteenth. It happened that the Pacific Mail Steamship Company’s ship Colima, first scheduled to depart for Yokohama on July 11, had been delayed until July 14. But it departed at noon without the three Harvard men. They had missed the boat.

In this emergency they were helpfully entertained by Harvard alumni. The Harvard Club of San Francisco had been organized on January 15, 1874. The first president, two vice presidents, the secretary, the treasurer, and half the fifty members attended the July 16 meeting that Clarke, Morse, and Spinney addressed as invited guests. Morse wrote in his first Class of 1874 report from Tientsin on April 20, 1877: “I would like to express my thanks to the San Francisco Harvard Club for their hospitality to the three members of ’74 travelling together, and for the attentions which tended to render our stay in the city as pleasant as it was.” Among other events in California, Morse celebrated his nineteenth birthday on July 18.

The next Pacific Mail steamer would not sail for two weeks, and the three recruits did not want to delay so long since they had to reach Shanghai by August 20. So they went by stagecoach with an old driver named Fox to Napa, north of San Francisco, driving through what Jack London later described as the “valley of the moon.” From the north Bay Area they took a tramp cargo steamer through the Golden Gate, and then by following the great circle route near the Aleutians, they came to Yokohama. Again, however, they missed the Pacific Mail steamer at Yokohama and had ten days to look at Japan, which they did with great enthusiasm. Morse, as spokesman for the group of three, presented their official creden-
tials to the Pacific Mail Company agent, enabling them to get tickets to Shanghai on credit, due to be paid on arrival.\textsuperscript{22}

In 1931 Morse could still vividly remember the day he disembarked at Shanghai in August 1874, "with the usual crowd of shouting coolies on the Pacific Mail Steamship Company’s pontoon."\textsuperscript{23} From the wide-open spaces of the American West and the Pacific Ocean, he and his colleagues had reached crowded China. Their arrival was duly announced: the \textit{North China Herald} for Saturday, August 22, noted: "Mr. Edward B. Drew, having been intrusted by the Inspector-General of Chinese Customs, Mr. Hart, with the duty of appointing three young gentlemen for service in the Chinese Customs, has selected Messrs. Charles C. Clarke, of East Cambridge; Hosea B. Morse, of Medford; and William F. Spinney, of Salem; all graduates of Harvard University of the class of 1874."\textsuperscript{24} Henry F. Merrill, who had lagged behind his three classmates, arrived a month later on the ship \textit{Oregonian} from Japan.\textsuperscript{25}

\textbf{Introduction to China}

The country where the four Harvard graduates were to spend most of their professional lives was in decline in 1874. The once-great Ch’ing dynasty, established 230 years earlier by alien Manchu invaders from beyond the Great Wall, had fallen on particularly hard times. Internally, a series of massive insurrections—beginning with the Taiping Rebellion (1851–64) and ending with the Muslim Rebellions of 1862–74—had nearly toppled the dynasty, costing millions of lives as well as enormous amounts of precious revenue. Externally, foreign powers, led by Great Britain, had imposed on China a series of unequal treaties in the period from 1839 to 1860. These onerous one-way agreements opened up a number of Chinese ports to Western residence and trade, gave foreigners extraterritorial immunity from the stipulations of Chinese law, limited Chinese customs duties, and protected the evangelical activities of Christian missionaries and their converts. Furthermore, the unequal treaties symbolized China’s military weakness, encouraging Japan in the early 1870s to claim sovereignty over the Liu-ch’iu (Ryūkyū) Islands—long a linchpin of the Chinese tributary system of foreign relations.

British dominance in the treaty ports of China by 1860 required that the growing China trade be handled in a Western manner without collusion between Chinese and foreign merchants. Britain’s worldwide empire of trade could grow only under a rule of law, and it had become plain, at least to British officials on the spot, that the best means to secure a rule of law
over the China trade was to hire foreign employees as Ch’ing government tax-assessing officials. It happened this way: In 1853, at the newly opened treaty port of Shanghai, the dynasty’s traditional maritime customs administration, which foreigners considered hopelessly corrupt, collapsed in the face of a Small Sword (Hsiao-tao hui) rebel takeover of the Chinese city. The British consul, Rutherford Alcock, arranged a “provisional” system of maritime duty collection that led to the establishment of a local foreign inspectorate of customs in 1854. The Chinese agreed to admit a Western supervisory element into the Shanghai customs administration if the British and Americans would take measures to secure the collection of back duties that had been owed to China since September 1853.

This initial foreign involvement in the Chinese customs brought tangible benefits to both the Ch’ing government and the Western powers. The former gained a regular and predictable source of income derived from foreign trade; the latter escaped the caprice, corruption, and considerable inconvenience of the old customs system. The idea of a foreign inspectorate spread. According to the Rules of Trade, negotiated with the foreign powers during the fall of 1858 at Shanghai, the Chinese agreed to enforce “one uniform [customs] service” at every treaty port, and in May 1859 the brash and impetuous head of the Shanghai Maritime Customs administration, Horatio Nelson Lay, was appointed inspector-general of the expanded service. In the early 1860s, however, he and the Ch’ing government had a serious falling out, and Robert Hart, who had left the British consular service to begin a career in the inspectorate, took over his job. In 1865 the Chinese authorities decided to make Peking the permanent headquarters of the new I.G., and Hart remained there until leaving China for good in 1908.

By the late 1870s, completing his second decade as inspector-general, Hart was dictator over an international service that employed about 120 men from Western countries, mainly Britain, and about 1,000 Chinese. Hart’s position was highly unusual. The British minister at Peking continued to give him diplomatic support, and he remained a British subject, but he took official orders and received pay for himself and his staff only from the Chinese government. As an agency of that government, the Customs Service enforced the provisions of the Sino-foreign treaties regarding the payment of dues and duties on foreign shipping and foreign trade in the Chinese ports opened by treaty. For this purpose Hart was engaged in grafting onto the world’s oldest bureaucracy an entirely new set of assumptions and procedures. At every point he confronted the conservative vested interests of the old Chinese order.

Since Hart was Morse’s ultimate superior and guide, not to mention
the most influential foreigner in China during the nineteenth century, it is pertinent to outline his career in a bit more detail and to indicate his general historical importance. He was born in Northern Ireland in February 1835 and had a distinguished classical career at Queen’s University in Belfast. In 1854 he became a student interpreter in China, serving at Ningpo, where he concentrated on learning Chinese and discovering the corruption and inefficiencies of Sino-foreign trade. He then became secretary to the Anglo-French Commission, which governed Canton under imperially appointed Chinese officials. In 1859 he resigned to become assistant commissioner of the new customhouse at Canton. When Lay, the chief administrator, went on leave in 1861, Hart took over for him, becoming permanent head of the Customs Service in 1863, at twenty-eight. The sketch of Hart’s career in *The Dictionary of National Biography* by Sir Charles P. Lucas underscores his crucial contribution: “Though not the first originator, Hart was the practical creator of the imperial maritime customs service of China, ‘one of the most striking monuments ever produced by the genius and labour of any individual Englishman.’”

Hart brought to his work as administrator and moral guide of the Chinese Customs Service a degree of skill comparable to that of President Charles W. Eliot at Harvard during the same period. Since Morse had the good fortune to be guided in his formative years by two such remarkably effective institution builders, a brief comparison of their careers may be useful. Eliot and Hart were almost exact contemporaries—the former was born in 1834, the latter a year later—although Eliot lived sufficiently longer to arrive in Shanghai and compose the inscription for Sir Robert Hart’s statue on the Shanghai Bund in 1914. Both men had “met the proper time”; that is, they had emerged into their historic roles as administrators of Harvard and of the Customs Service respectively in answer to unusual opportunities. In both cases an accumulation of forces called them to serve as leaders in programs that the times required.

In the fourteen treaty ports of China, where Hart had opened most of the Maritime Customs offices himself as officiating I.G. from 1861 to 1863, he faced multiple problems. He was employed by, and reported to, a committee of the emperor’s executive body, the Grand Council. This committee, headed by grand councillors, was called the Tsungli Yamen—the ad hoc “Office in General Charge” of the Ch’ing dynasty’s foreign relations. Since Peking had just been conquered and its Summer Palace looted by the British and French forces in 1860, the Tsungli Yamen was far more threatened and more difficult to deal with than President Eliot’s superiors in the
Harvard Corporation and Board of Overseers, who were virtually all well known to him and his family. But Eliot was still somewhat questionable since he was a scientist—then a role often viewed askance by proper Bostonians. Hart had to win the confidence of a committee of timorous but bitterly incensed xenophobes who knew each other all too well, while he was a total outsider, if a knowledgeable one.

This comparison of the Tsungli Yamen and Harvard’s governing boards, which has never been made before and may never be again, is useful only because of the moral imperatives involved in the two situations. The administrator in each case had to begin by proving his complete honesty and reliability as well as his superior technical competence. In addition, whether in America of the Grant administration or China of the Empress Dowager, Tz’u-hsi, an administrator had to eschew corruption and maintain his own sense of right and justice while tolerating many who differed. Hart’s inspectorate general was indeed a model of incorrupt efficiency, but modern Chinese scholars have tended to view it harshly as a self-interested instrument of foreign imperialism (see chapter 14).

Although China in the 1870s was a world apart—exotic and traditionally impenetrable to uncouth Westerners—Morse’s experience was to show that the environment of his Harvard education shared certain marked features with the environment of the Customs as he became its employee. In both situations, new institutions were being created to deal with the effects of material and technological growth. These efforts, moreover, were being pursued by men of classical training who knew what they believed. They felt themselves to be on a frontier of progressive reform, not of revolution. Innovation was expected but only on the basis of careful analysis. Intellectual grasp and acuity, together with moral integrity and probity, were as much in demand on the coast of China as they were in Cambridge, Massachusetts.

Most foreign denizens of China did not believe that the Ch’ing dynasty had the capacity to reform. This was particularly true at Shanghai, which by the 1870s had become by far the most important of the treaty ports. There, foreign merchants and foreign diplomatic officials shared an aggressive contempt for Chinese officialdom and, to a lesser extent, the Chinese generally. Their attitude was reflected almost daily in the pro-merchant English-language newspaper called the *North China Herald*.

Everything about China seemed to rub the *Herald* the wrong way, as a few excerpts from the 1870s will indicate. In the midst of the Ch’ing government’s ongoing negotiations with the Japanese over the Liu-ch’iu Islands, for example, the *Herald* editorialized that China’s leaders “dis-
played little but imbecility in their dealings with Japan on the Formosan difficulty.”\(^\text{30}\)

Caustically contemptuous of Ch’ing officials for their apparent ignorance, jealousy, and inexperience, the newspaper ridiculed China for having “neither the organization, the communications, nor the means” to make use of its abundant resources.\(^\text{31}\) It condemned China’s system of education as something that merely “dwarfs and narrows the intellect” and described “the main object” of Ch’ing government to be nothing more than “to utter platitudes and increase taxation.”\(^\text{32}\)

Naturally enough, the Herald criticized Hart for according the Chinese too much respect and for doing their bidding rather than simply dictating to them. On March 11, 1875, the newspaper editorialized: “One does not argue with children; one reflects on what is best, and desires them to conform.”\(^\text{33}\) Hart’s predecessor as I.G., H.N. Lay, held a similar opinion. He once remarked of his role: “My position was that of a foreigner engaged by the Chinese Government to perform certain work for them but not under them. I need scarcely observe in passing that the notion of a gentleman acting under an Asiatic barbarian is preposterous.”\(^\text{34}\)

Hart, however, had a different view—expressed unambiguously in his famous memorandum of June 21, 1864, which stated: “It is to be distinctly and constantly kept in mind that the Inspectorate of Customs is a Chinese and not, a foreign Service, and that as such it is the duty of each of its members to conduct himself towards Chinese, people as well as officials, in such a way as to avoid all cause of offense and ill-feeling.”\(^\text{35}\) As we explore Morse’s unfolding career in China, it becomes quite clear that Hart’s attitudes, rather than those of Lay or the North China Herald, had the more profound effect upon him. Nonetheless, the widespread skepticism of foreigners in China, particularly toward Ch’ing officials, also left its mark.

### Customs Duties

What role did the four Harvard recruits play in the Customs Service? During Hart’s time Britain took the lion’s share of China’s foreign trade, sometimes as much as two-thirds of it, and foreign employees of the Customs were predominantly British. Initially the French held second place in trade, and the Americans third; but French trade fell to the fourth position as France became more involved with Indochina. Japan’s trade became increasingly important, and as German trade grew, it eventually exceeded that of the Americans, whose share of the China trade had diminished after the Civil
War. Americans were a small minority in the Customs Service, but they could be of great use in posts where European rivalries were intense and officers from a neutral background might be more acceptable to all parties. The indoor staff, who were the chief administrators, maintained the totals of employees by nationality decade by decade. In short, the Harvard Class of 1874 supplied close to 30 percent of the Americans in the top levels of the Chinese Customs administration during the last quarter of the nineteenth century.

As neophytes, Morse, Clarke, Spinney, and Merrill faced the complex task of learning the structure and functions of Hart's Customs Service. By 1874 the I.G. had pretty well completed his institution building. The forms for regular commissioners' reports to him had been worked out and printed. At least twenty-five such documents were to be drawn up in two or more copies and sent to the I.G. monthly, quarterly, or annually. Without carbon paper, the foreign Customs assistants, grades 4B through 2A, plus the Chinese secretaries or writers, *shu-pan*, served as the Xerox machines of the day.36 The new Customs recruits had a lot to learn and much work to do in the process of learning.37

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Source: S.F. Wright, *Hart and the Chinese Customs*, appendix.

Most important were the provisions of the foreign treaties and agreements with China enshrined in this peculiar Chinese sector of international law—a blatantly unequal (nonreciprocal) legal device modeled after earlier Western treaties with Turkey. The most-favored-nation clause ("We get any privileges others get hereafter") made all the Chinese treaties into a single document: if Norway or Peru secured some special privilege, that privilege automatically accrued to all the other treaty powers. A Customs official had to know the treaties' Chinese texts and also be aware of pertinent imperial edicts and Yamen instructions.38 The effective negotiator would have homework to do because, as a Chinese employee, he was usually the adviser of a principal Chinese official who bore the often onerous responsibility of dealing with foreign complaints and demands.
Hart naturally placed heavy emphasis on learning the Chinese language, which was to him both a necessity and an intellectual interest. The I.G. wrote in a circular of November 1, 1869:

The acquisition of Chinese by all seems calculated to ensure the continued existence of the service, for, in that way, the service may hope to be able to commend itself, as of intrinsic value, to the approval of Chinese officials; the acquisition of Chinese by all frees the Inspector General from the invidious task of having occasionally to place juniors who can speak, over the heads of otherwise well qualified seniors who cannot speak, the language; by inducing all to study the language, there is given to each what is in itself capital in this country, and by the very fact of thus making the service, and the Chinese Government too, independent of myself, I again hope to increase for the service its chances of existence; experience has shown that, no matter what the rank of the individual who appears as principal, the Chinese authorities too readily look to the Chinese speaking medium as really the person to be dealt with.39

He went on to say: “Students of Chinese are certain to form a truer estimate of the national character, and a truer appreciation of their position under, and of the work to be done for, the Chinese government; and lastly, there are the possibility and hope of good, internationally speaking, springing from the study of the Chinese language by so many able and educated men in Chinese employ.”40 According to Morse, in the early stages of his own training a Chinese language teacher came every morning, and “for an hour before breakfast I worked with him.”41 His Harvard class report of 1877 says: “Chinese studies are supposed to engross the greater part of our time. It may interest some of my friends to know that I discover no marked connection between that language and those of the Aryan stock: in fact, it is like nothing else under the sun. There are no politics in China to be engaged in, except by deep study of the classics.”42

Morse’s retention in Shanghai for two and a half years when his three classmates were soon sent to outports did not give him a particularly good start on the Chinese language. Aside from formal lessons, he apparently had few opportunities to use the official North China dialect known as Mandarin (kuan-hua). Although Ch’ing officials were supposed to use this dialect as their lingua franca (hence the term mandarin), Morse had little or no interaction with such individuals in the initial phases of his career at Shanghai, where the Wu dialect prevailed in nonofficial daily discourse.43 Unfortunately for Morse, the Wu dialect and Mandarin are mutually unin-
telligible. When Morse was posted north to the Customs office at Tientsin, he confessed, “I knew only enough Chinese to pi-fang my way along.” \(^{44}\) (Pi-fang here refers to a kind of analogizing, comparable to the English usage “that is to say,” or “for instance.”) As millions of language students have discovered over the centuries, an hour a day in the midst of a busy life is the most tantalizing and inefficient way to learn to “speak like a native.” Most have found it cannot be done. The foreigner’s lips, tongue, and vocal cords cannot so easily become habituated to the native way of speaking. Fortunately for the young Customs trainees, their office work obliged them to learn the rudiments of everyday intercourse, and they knew that their careers depended on passing examinations in Chinese, both written and spoken.\(^{45}\)

The Customs as a bilingual institution came to their rescue. The Chinese staff outnumbered the foreigners about five to one, and official documents had to be in both Chinese and English: in Chinese for office records and for presentation to the local Chinese superintendent of customs at each port and eventually to the Tsungli Yamen at Peking; in English for the commissioner’s files at the port and for presentation and records at the inspectorate general over which Hart presided at Peking under the wing of the Yamen. A foreigner who could do the figuring and calculating of the office work could usually learn to read and speak for professional purposes. But the prize of advancement was likely to go to those who could really become interpreters. This was the route through which Hart had risen, and Morse in his career proved to be a competent interpreter and negotiator in Chinese.\(^{46}\) This did not, however, make him a sinologue capable of reading widely in the several styles of history, philosophy, or belles lettres, for which he had little leisure.

Indeed, the whole problem of foreigners’ use of Chinese needs further study. It was a part of the ritual process through which the foreigner fitted into the Chinese scene, and the rituals could become cut and dried. Some Westerners made the minimum effort required. The foreign merchant who forthrightly spoke pidgin (“business”) English with his comprador was usually a realist impatient of ritual. But virtually all foreigners in China, even those with considerable command of the language, had Chinese assistants they could lean upon for help. The missionaries developed a specialized professional patois, far different from the “Customs Chinese” based first on Thomas F. Wade’s and then on Friedrich Hirth’s textbooks.\(^{47}\) The use of the Chinese language by foreign Customs personnel deserves careful appraisal to discover its scope and efficacy.
Life in Shanghai

Shanghai, where Morse was to spend his first two and half years and about one third of his total time in China, was both a major commercial city and an important administrative center. It had been a mere village on mud flats in the midst of an alluvial plain until foreigners turned it into an international entrepôt in 1843 as one of the first five treaty ports established under the Treaty of Nanking in 1842. All the midcentury upheavals intruded on the city: the Opium War in 1841, the Small Sword Society uprising in 1853, war again in 1854, followed by the Taiping rebels’ siege in 1860 and in 1862.

Trade was the central focus of the British-dominated foreign community at Shanghai. It included shipping, mail, and the Imperial Maritime Customs. Brokers handled bills, shares, coal, freight, and the like. Lawyers, consulates, and the British courts ironed out pressing legal issues. Morse would deal, directly and indirectly, with most of these officials in his Customs work.48

As China’s chief ocean port, and also the main outlet for the Yangtze River ports, through which most inland trade passed both ways, Shanghai had special significance to Ch’ing officials, Hart in particular. The city occupied an increasingly strategic position in China’s growing maritime trade, and therefore in the expansion of customs revenue. Calling Shanghai an ocean port is, however, stretching the term. Shanghai actually lay thirteen miles up the Huangpu tributary from the Yangtze; and from the junction of the Huangpu and the Yangtze it was sixty miles to the sea. Smaller waterways, including the Wusung River (known to nineteenth-century Westerners as Soochow Creek), flowed into the Huangpu at Shanghai, adding to the boat traffic.

Boats of every description clogged Shanghai’s arteries: native junks and sampans, foreign sailing ships and steamers. Westerners, ever smug and condescending, took pleasure in contrasting traditional Chinese methods of commercial transport with their own more “modern” ones. Thus we find a North China Herald correspondent offering the following account of a busy river scene in early 1876: First, she describes a collection of old-fashioned Chinese ships loaded with “sugar from Swatow; others with millet, and blocks of paper, and oil, both from Hankow; seaweed from Hakodate; and saltfish from Bangkok; sandalwood from Australia; oranges from Swatow and Canton; pumalows from Amoy; and last but not least bale after bale of beautiful white cotton—product of native toil and industry.” Then, leaving the Chinese fleet behind and approaching the foreign shipping, the Herald correspondent perceives “a striking contrast, and one we may be well proud...
of, as we regard the advance of science on our own part and look back with astonishment at the want of progress evinced by the Chinese as compared with their advancement in civilization when we were in an utter state of barbarism. Pondering on these things, we reached our home inwardly and gratefully acknowledging the benefits derived from art and science, as well as from industry and perseverance, without which we should still be in an unenviable condition as that of the apparently contented Chinese.”

The sometimes unbearable congestion born of China’s outmoded boat technology was by no means Shanghai’s only inconvenience. The port’s tributary rivers continually silted up, and the Chinese government rarely got around to dredging. As a result, trade flourished, but not without ships running aground or being obliged to change channels. Moreover, Shanghai’s climate was severe. Winters were cold; summers were hot, humid, and oppressive. In Morse’s time, the heat gave rise to many health problems, among them tuberculosis, malaria, typhoid fever, and alcoholism. There was a constant incidence of diarrhea, dysentery, respiratory problems, and various “remittent” and “intermittent” fevers. Some diseases seemed seasonal. Smallpox, for instance, occurred more in winter; typhus, in spring. There were also occasional cholera epidemics, especially among the Chinese. With improper sanitation and hygiene, and few cures, bad health was a major feature of life in China. As we shall see, it played a crucial role in Morse’s later career.

Although canals and other waterways provided a cheap and convenient means of inland transport in the Shanghai area, land communications remained primitive. While the United States, Europe, and Japan had moved into the railroad and streetcar age, the arrival of Morse and his classmates in Shanghai coincided with the start of China’s ricksha era. The “man-power-cart” (jin-riki-sha) had been invented in Japan in 1872 by a foreigner impressed with the efficiency of ball bearings. A Frenchman named Menard imported the invention to Shanghai in 1873, and by the spring of 1874 the French Concession had decided to issue twenty licenses, each to cover twenty-five rickshas. The Shanghai Municipal Council, in charge of the International Settlement where most of the foreigners who were not French resided, followed suit. In this way the new device found its way into the Chinese guild system. By 1929 Shanghai would have thirty-six thousand licensed rickshas, and the conveyance would have spread all over China. But even during the 1870s there were already complaints about too many rickshas in Shanghai.

What about other forms of communication? Morse would find that in 1876 foreigners built a twelve-mile Shanghai-Woosung railway. In 1877
the Chinese authorities bought it and destroyed it because they feared that such new inventions would pose a threat to their control. Consequently China’s railway age began only in the 1890s. Eventually the Chinese paid a high price for this lack of innovation. Because food could not be transported rapidly, nor help easily brought in, famine could and did take a terrible toll, especially on the vast North China plain. Meanwhile, an undersea telegraph cable had reached Shanghai from Hong Kong in 1870 but was not permitted ashore; so it remained, formally at least, on a ship until 1878.\textsuperscript{52} There was not even a national mail service. China’s foreign Customs employees thus endured many frustrations.

These technological deficiencies did not hinder the growth of a thriving foreign and Chinese community in Shanghai. The British Settlement quickly became international and was administered jointly with an American group based in the Hongkew district. The French maintained a separately administered settlement. The Bund along the riverfront gradually developed with large and impressive buildings of British Victorian style, including a fine customshouse.\textsuperscript{53} All the while the foreigners maintained their own legal system, which protected their hard-won treaty rights and privileges. From 1868 until 1927, a Sino-Western Mixed Court—presided over by a Chinese magistrate who sat together with a foreign consular representative known as an “assessor”—handled all cases within the International Settlement that involved Chinese (or foreigners without treaty rights) as defendants.

Westerners in Shanghai during the 1870s were an international group but were primarily Anglo-American, with English as the lingua franca. Social life in the city was lively, whereas in the smaller ports, “it varied between the narrow and the extremely narrow.”\textsuperscript{54} Most foreigners belonged to consulates or big firms like Jardine, Matheson and Company, Dent and Company, Russell and Company, or the Hong Kong–Shanghai Banking Corporation. These expatriates tended to be bachelors who lived in quarters and ate at a mess arranged by their firm or organization. Their central meeting place was the pretentious Shanghai Club at the south end of the Bund. Built in 1864, it boasted a big four-story structure with bedrooms as well as dining facilities. By Morse’s time a Customs Club had appeared at the corner of Chapoo and Boone Roads. Open to all members of the Imperial Maritime Customs Service, it had a library, a billiard room, a card room, a bar, a bowling alley, and a ballroom “reputed to be the best room for dancing in Shanghai.” When not in use, it served as a gym.\textsuperscript{55}

Like most “outsiders” in a foreign land, the Westerners at Shanghai consorted chiefly with one another. Dinner parties loomed large in treaty
port life, and in the 1870s relations were friendly and informal. Social contacts with Chinese hardly existed, however. Chinese officials looked down on non-Chinese and tried to avoid them. Foreigners, for their part, saw Chinese merchants, room boys, language teachers, and ricksha men but did not socialize with them. A businessman might be in China his whole life but not be of it. Missionaries and Customs personnel had the best chance of getting further into the Chinese scene, but they did not always do so, either by choice or by circumstance.

Shanghai in the mid-1870s was prosperous. Since many of the wealthy representatives of the great trading firms were still important community leaders, their influence kept the juniors mindful of their responsibilities without curtailing their enjoyment. As a charming young bachelor, Morse must have found many pleasures to pursue after hours. There were sailing races in season, and the Amateur Dramatic Society gave frequent performances of comedies, usually with an all-male cast. Plays with titles such as *Tweedleton’s Tail Coat* or *Dearest Mama* did not go down well, but *Trial by Jury* by Gilbert and Sullivan, and *Cox and Box*, played to highly appreciative audiences. There were also plenty of musical events—among them minstrel shows featuring the “Bengalee Baboo” and small musicales arranged by the German community. The Philharmonic, which had fallen into abeyance for a while, was revived in the autumn of 1875. While its performances were suspended, a Wind Instrument Society provided summer outdoor concerts.

Special yearly events filled many spots on the foreign social calendar. In December 1875 the *North China Herald* noted the opening of a new Temperance Hall for concerts and lectures. One of the first events was a Masonic Ball held in early January 1876, with three hundred guests but only sixty ladies, a typical imbalance of men and women. February witnessed the Mi-ho-loong Ball with music supplied by “the excellent band of the U.S. Corvette Hartford.” The party began with dancing at 10:00 P.M., progressed to supper at midnight, and then went on to more dancing until 2:00 A.M., when the ladies departed and the men settled down to sing. Shanghai residents also derived a great deal of pleasure from the annual May Flower Show.

We may suppose that the chief social event of Morse’s first years in Shanghai was the U.S. centennial celebration of the Fourth of July in 1876. The American settlement at Hongkew was decked with flags, and the ships were arrayed with bunting—although British ships could not join the festivities as no American man-of-war was in port “with which to interchange the customary Naval etiquette.” However, “God Save the Queen” was
played along with "La Marseillaise" and "Hail Columbia." Chinese as well as foreign officials were on hand to view the 9:00 P.M. illumination and fireworks at the consulate, cheered by plentiful drink. After a reading of the Declaration of Independence, the new U.S. consul-general, John C. Myers, gave an oration. Many anthems and songs were sung: "The Star Spangled Banner" (not to become the official American national anthem until 1929), "The Red, White and Blue," "The Pilgrim's Legacy," "Uncle Sam's Farm," "Get Out of Mexico," and finally "Yankee Doodle." Everyone toasted one another, and except for one drowning, the crowd had a good time. 59

Many youthful Westerners in Shanghai enjoyed sports. Paper chase hunts were frequent and often tumultuous. Skating proved popular in winter, and horse racing drew big crowds in the spring. Cricket enjoyed the kind of popularity one might expect in a British-dominated community. 60

Morse decided to take up rowing. The Shanghai Rowing Club, founded in 1860, was a flourishing organization with elected members (grantees), racing and pleasure boats, and a boathouse. Morse, having been duly proposed and seconded, became a member of the Rowing Club on October 22, 1874, and on the same day at 3:30 P.M. he rowed at bow in Mr. Millar's eight in the club's Eight Oar Race. It was, in the words of the Herald, "beyond question, the race of the day": one mile over a course coming up the Huangpu River and finishing at the boathouse opposite the University Church on Soochow Creek. 61 One of the club rules, "No Chinese coxswains allowed," seems to have been less expressive of racism than of self-defense. After all, if one trading company crew found a skillful eighty-pound Chinese cox, everyone else would have had to do the same. 62

Morse, who was slightly built, may not have been in top condition after his recent long sea voyage, but at least he drank sparingly—unlike most of the others. Moreover, he soon got into fine shape. His crew practiced twice a week all summer, and at the end of September they began preparing for the autumn regatta. The Herald for October 28 reported, "Training for the forthcoming Regatta goes on spiritedly. Sometimes six crews of eights are to be seen at work on the creek ... and this beautiful weather makes everything very lively." 63 In June 1876 Morse wrote from Shanghai for his Harvard class report of 1877:

My health has been good. The China of the present day is not such a dreadful place to live in, if sufficient exercise is taken; and I have gone in for rowing at every one of our semi-annual regattas, for which I am now the lawful possessor of four cups of various metals (excluding
gold). You never heard of me before as a rowing man, did you? Now, I am in eights and fours as bow. All that is required of bow, as he does not steer with us, is that he should be a light weight. (My rowing weight is one hundred and thirty pounds.)

The *Herald* dutifully covered all the races, a number of which Morse's team won. Its account of the regatta in October 1875 catches the mood:

The time of the first race was set down for 12:45, and about that hour, visitors began to arrive on the banks of the Creek, till in a very short time the neighborhood of the Boathouse and the well-known Mound was crowded with boating men, their friends, and ordinary visitors, soon presenting a very animated appearance, and proving the popularity of the sport to which the afternoon was to be dedicated.

The 'Hims' held the Boathouse and Mound; but the pleasant grounds of Messrs. Miller and Batt’s bungalow were thronged with ladies and gentlemen who had availed themselves of the owner’s courteous invitation to all and every member of the S.R.C. and their friends. By the kind permission, too, of Captain Colomb and the officers, the band of the *Audacious* played in the garden during the afternoon and contributed greatly to the pleasure of the visitors. The apposite introduction of a few bars of “See the Conquering Hero Comes,” while the winner of the Ladies Purse was being conducted to receive his prize, was not the least happy of their efforts.

Morse was in the club eight as bow of the Blue boat, which “finally won by a length and a half.” Their time was five minutes and thirty-nine seconds—“one of the quickest mile races rowed on the creek.”

The members at the 1876 annual meeting voted that the forthcoming spring regatta would be held in Soochow Creek, not on the Huangpu River, which was becoming too congested. On May 27, 1876, the *Herald* duly reported the event. This “Queen’s birthday” regatta included the opening of a new boathouse, draped with flags, on Soochow Creek. The affair commenced with a procession of boats; spectators played croquet and quoits between races. Morse lost once but won in the club White four-oar by four lengths. He apparently did not row in the fall meeting, however, and by the time of the spring regatta of 1877 he had been transferred to Tientsin, where his rowing career came to a permanent end. There he found a lively social atmosphere reminiscent of Shanghai, but more important, he confronted for the first time the grim realities of life on the North China plain.
Adventures in North China, 1877–1879

Morse’s first posting to Tientsin in March 1877 put him directly under Commissioner Gustav Detring, a “pleasant, intelligent young fellow” of German extraction who had arrived on Hart’s doorstep in October 1865. Although Detring spoke with a lisp that Hart felt would impede his speaking Chinese well, the German commissioner became principal foreign adviser to the well-known Ch’ing reformer Li Hung-chang. As governor-general of the strategic metropolitan province of Chihli (modern-day Hopei) from 1870 to 1895, Li played a pivotal role in Chinese foreign affairs from his base in Tientsin and also led China’s “self-strengthening movement”—an effort begun in the early 1860s to build up China’s military, naval, and economic strength to contend with both internal disorder and external aggression.

Morse at Tientsin

So valuable was Detring to Li that both men enjoyed an anomalous twenty-five-year continuity at one post. The German commissioner had become Li’s man in the Customs, and Hart let him be so. As a matter of policy the I.G. welcomed the idea of his “lieutenants” serving “big men” such as Li, feeling that “so long as they he & I are all on good terms, it ought to be [a source of] strength to me.” In 1881 Hart remarked to his London agent, James Duncan Campbell, that Detring “is a first-class man,—has done excellent work,—has German proclivities, of course, but is first of all for China, and he is more loyal to me than are most others; he naturally has more influence than anybody else with Li, and Li is for the moment more go-ahead than any other man in China. . . . Li is the man for the moment, and D. is at his right hand.”
At Tientsin, from 1870 onward, Li and Detring operated as if they were a direct part of the metropolitan administrative apparatus, even though they were located at least eighty miles downstream from Peking. Tientsin had become a treaty port in the second peace settlement of 1858, but it remained relatively isolated, about fifty miles upriver from the ocean at Taku. As one result of its isolation, Tientsin in 1877 was still not tightly connected with the modern world. Morse later recalled that at this time "there were no telegraphs or railways, no Chinwangtiao [a modern port north of Tientsin] and no steamers to Tientsin after the river froze." In a normal year, "the last steamer left Shanghai December 1st and the first in the spring left about March 1st." In the absence of telegraphic communications, the dates for opening the port "were based on guesswork."  

Beginning in 1867 the Customs Service had instituted a thrice-weekly mounted courier service to bring the Tientsin community and the Peking legations their mail during the winter doldrums. Couriers came overland from Shanghai and Chinkiang. As the junior assistant at Tientsin, Morse did the postal work. In 1933 he remarked: "[M]aking up the outgoing mail was easy since mail matter for the Yangtze was resorted at Chinkiang, all other at Shanghai; when incoming couriers arrived, I was hunted up and I sent out an S.O.S. for the other Indoor [Staff] Assistants to come and help: when Mr. Detring arrived [back from leave] I was his secretary and had other responsibilities thrown on my shoulders."  

Only twenty-two in 1877, Morse already had been in China for three years, and he was enjoying life. Although Tientsin paled by comparison to Shanghai, Morse found moments of lighthearted diversion in slack periods. He remembered that "winter was a grand time; we closed the year’s trade returns in the middle of December, and after they were off there was nothing to do except to attend to the mails (tri-weekly), ride over the plains (there were no floods around Tientsin in 1877) and work up private theatra­cals." The mercantile antagonism against the Customs, so powerful at commercially vibrant, antibureaucratic Shanghai, was far less evident at Tientsin. The members of this preponderantly Anglo-American treaty port community led a gay life when they could, and young Morse plainly fitted in and enjoyed himself.

On January 10, 1878, a printed notice for the Bachelors of Tientsin, featuring P.G. von Mollendorff, Edmond Farago, and H.B. Morse, all of the Customs, invited participation in a ball at the Astor House. A few weeks later the three men staged Villikins and His Dinah, in which Morse played the part of "Miss D. Gruffin, in love with Villikins." For this role he made
use of a dress and other female accoutrements kindly provided by Mrs. William Forbes. Morse tells us that he was “much in request as a dancing partner in the dance after the play supplementing the other six ladies.”

Frivolity soon surrendered to deadly seriousness, however, as Morse had to turn his attention to famine relief. This horrifying experience in 1878 brought Morse into contact with one of Li Hung-chang’s rising stars, the talented financial manager Sheng Hsüan-huai.

The Famine of 1876–1878

Westerners coming to China in the 1870s found themselves on the frontier of technological conveniences. The China treaty ports were accessible by steamship, but as yet no railways led inland. New housing in the foreign settlement areas might be made of stone and brick and outfitted with plumbing, which made possible both running water and water closets. But once one left these enclaves, Chinese inns and even the official establishments of Ch’ing bureaucrats (known as yamens) offered no modern facilities. A foreigner concerned about his health and probably already subject to diarrhea, if not actual dysentery, would naturally take refuge in his residential quarters, daily work in new office buildings, and Western cuisine at the club. Only the adventurous would seek opportunities to go into the “interior,” as the rest of China was called.

Foreign employees of the Maritime Customs, however, were civil servants of the Chinese government and therefore expected to have a somewhat greater degree of contact with the people. They had begun by studying language for this purpose and soon learned the rules of diet and hygiene that were assiduously followed by experienced hands: drink no water that has not been boiled, eat no fruit that one has not skinned oneself, avoid all cold dishes of any sort. Even so, the foreign traveler could only pass through the scene, with the way made easier perhaps by servants and local Chinese officials. The harsh realities of life and death among the common people were still remote from the foreigner’s direct experience. The American journalist Edgar Snow tells us in Journey to the Beginning that he became permanently committed to helping the Chinese people when he ventured into the northwest famine area in 1931. “It was an awakening point in my life,” he wrote. At a comparable age, half a century earlier, young H.B. Morse had a similar experience.

The year 1876 brought excessive rain and severe floods to South China and drought to North China, a climatic aberration such as might today
Adventures in North China

be attributed to El Niño. Imperial edicts in reply to memorials by Ch’ing officials began to appear from mid-1876 in the Peking Gazette, indicating the crisis all across North China and the traditional measures designed to deal with it. These measures consisted mainly of the distribution of grain extracted from government granaries or diverted from shipments bound for Peking, plus appropriation of provincial funds from native customs or other sources. Destitute refugees from the north flooded into cities of the Yangtze valley. Treaty port consuls reported what missionaries had learned from Chinese Christians or what they themselves had observed. By February 1877 the well-known missionary, the Reverend Timothy Richard, a Welsh Baptist, reported to the Chefoo consul the starvation at Ching-chou, Shantung. Letters from Catholic priests told similarly moving stories.

The famine had several immediate causes, the most important of which was drought. Few streams in the farming country of North China had a permanent flow of water. Except for the Yellow River, which traversed the plain for some four hundred miles from its emergence south of Shansi province to the sea south of Tientsin, the water table generally permitted nothing more than well shafts that could supply water for drinking and washing. There were no tube wells and no mechanisms for irrigation except the ancient treadle wheel that could be used on the bank of a pond or stream. The loess soil was certainly fertile enough, but the many millions of peasants who worked the land unceasingly relied on adequate rainfall to make their crops grow.

Unfortunately, for three consecutive years no rain fell in most of North China. The wind continued to blow, however, and as the soil became more dry and friable, enormous clouds of dust often buried the crops that had weakly tried to emerge. In the absence of water, sun and wind conspired to turn the plain into a desert. Prayers for rain offered by the Ch’ing emperor and his officials were to no avail, and government granary supplies soon disappeared. Compounding matters were shortages that resulted from the diversion of farm labor to corvée service as part of an earlier effort to suppress the Nien Rebellion (1851–68), coupled with the use of farmland for producing opium poppies rather than food crops in order to realize quick profits.

Naturally enough, the price of grain skyrocketed. In many places it shot up to at least eight times the normal rate. Enterprising merchants stood to gain from this bleak situation, but they faced several obstacles. One was the persistent threat of banditry. Another was the high cost of transport, even in relatively safe areas. Bringing grain into the interior by carrying pole was
inefficient, because the carrier had to eat so much of what he carried. Importation by wagons entailed similar difficulties because the traction animals had to be fed. Water transport, normally the most cost-efficient form of inland communication in China, was a limited possibility in the North, especially during a drought. Yet despite the many risks and high costs, grain speculators who managed to buy the protection of Ch’ing officials could make a killing, in several senses of the term.

Corrupt bureaucrats and their yamen underlings gained not only from the bribery of hoarders and profiteers; they also benefited from their own ingenious moneymaking schemes. The prospect of government tax remissions, for example, moved some local officials to enforce immediate collection of the revenue, “with a view to falsely representing hereafter that the people are in arrears, and converting to their own use the amounts obtained.” A Ch’ing censor reported at one point that in distributing relief grain “clerks and underlings . . . levy exactions demanding future repayment at the rate of cent [i.e., 100] percent.” Famine sufferers were thus “deterred from venturing to apply for relief.” Indeed, some even offered money to the yamen underlings in order to be exempted “from receiving their quota of relief.”

The obvious consequence of such shameless speculation and bureaucratic corruption was massive misery. The inland provinces of Honan, Shansi, and Shensi suffered most. Although millions of desperate people managed to leave the periphery of the famine area, millions more lacked the energy or means to do so. For those who remained in the region the first recourse was to substitute for everyday food the partly edible materials that normally no one would think of eating: grain husks, potato stalks, elm bark, turnip leaves, and grass seeds. Although these substances might dull the pangs of hunger, they could do little to nourish the body. The typical famine sufferer would have a hideously bloated stomach and emaciated limbs.

The next recourse was to raise a little cash by selling material possessions in the hope of purchasing what small supply of grain might be available in the hands of merchants or the wealthy. Once furniture and furnishings had been sold, a house might be dismantled in the hope of selling its components. Roof thatch could be used to make a small fire for boiling the remaining thatch as a food substitute. As the cold of winter set in, furnishings and houses became fuel to keep people from freezing. In some areas large pits were dug, and dozens or hundreds of homeless persons crowded together into them in order to share their body heat.

After a family’s material possessions had been exhausted, members
of the household might then be sold. Boys could be taken in and adopted by families that needed sons, while wives and daughters had some value as slaves or prostitutes. And when famine had finally destroyed the things most dear to every householder and parent, the last recourse was cannibalism. As people fell dead by the roadside, their flesh had to be quickly carved off and carried away, before wild dogs or birds of prey could get at the bodies. The Roman Catholic bishop of Shansi, Monsignor Louis Monagatta, reported in March 1877: “Now they kill the living to have them for food. Husbands eat their wives. Parents eat their sons and daughters, and children eat their parents.” Gruesome stories began to circulate freely—of a grandson who chopped his grandmother to pieces, of a niece who boiled and ate her aunt.  

Under these nightmarish circumstances, the foreign communities at Chefoo, Tientsin, Shanghai, and other ports began to collect relief funds for forwarding to missionaries. Some 36,000 taels thus reached Chefoo to help counter the famine in Shantung. In June 1877 Governor-general Li Hung-chang reported to Peking a collection of 214,000 taels from officials and gentry in that province. In October 1877 the Chinese secretary at the British Legation, William F. Mayers, put the total recorded relief funds in both money and goods at 2,623,000 taels, including the foreigners’ 36,000 taels. By this time, however, the dead already totaled several million persons. Appropriation of government funds was at best a gesture of sincerity, to show the emperor cared. The foreign contributions, though of great symbolic value, were practically inconsequential.

Moreover, collecting money from foreigners was the easy part of famine relief. Getting funds securely delivered to the heads of destitute families required penetration of the countryside to the household level, bypassing layers of yamen underlings, village headmen, and the leaders of the local mutual security system known as pao-chia, through whom top-level decisions were usually conveyed. This in turn required hard travel by sampan, cart, chair, or mule or on foot such as only missionaries, bandits, or soldiers ever attempted. The Reverend John L. Nevius provides us with an inspirational example. In the period from March 10 to June 4, 1877, he disbursed a total of 7,600 silver taels in relief funds. Having enrolled the names of the destitute in various villages, he sent to each enrollee fifty copper cash (one-sixtieth of a tael under the circumstances; normally one-twentieth of a tael) every five days and so aided 32,500 persons in 383 villages within a ten- to fifteen-mile radius. The coppers enabled them to buy grain to mix with the leaves, roots, and chaff or even slate-stone that they were eating. Nevius’s greatest problem was sending the silver he had
received to market towns twenty-five to forty miles away to purchase cash and wheel it back in barrows.18

Relief work was not only difficult; it was also dangerous. The greatest threat, aside from banditry, came from the mob-sized numbers of the destitute. Hordes of homeless, starving people congregated on the main routes of travel. As Commissioner Detring at Tientsin explained to the Shanghai Relief Committee, the Chinese authorities had to stop giving relief near Tientsin because "the masses of relief seekers swamped on more than one occasion the distribution office and compelled the relief agents to save themselves over the wall or through a back gate."19 We may compare the incident in Theodore H. White's Mountain Road, where a well-meaning dispenser of food is killed in the mêlée his food arouses.20

**Morse's Role in Famine Relief**

Morse's introduction to the suffering caused by famine must have been the influx of desperate refugees who flocked into Tientsin during his first year there. In the winter of 1877 the North China Herald reported ninety thousand refugees. There were thirty deaths after dark every day, seventy to eighty when it was cold. One harsh January night, a terrible fire in a dangerously located soup kitchen killed about three thousand people.21

In the summer of 1878, after many months of exhausting effort, the Tientsin Relief Committee decided to send five thousand taels to be distributed in Hsien-hsien, an area known to foreigners as an established center of Catholic mission work.22 It was located in Ho-chien prefecture of Chihli province, about seventy-five miles from Tientsin. Morse tells us that "someone was wanted to take relief into Hokien-fu who should be acceptable to both Reverend Muirhead, the Secretary of the Shanghai Relief Committee and Viceroy Li Hung-chang, and Detring proposed [Edmond] Farago and me. Farago soon withdrew and I was left alone."23 It says a great deal for Morse's character and personality that he was one of two Customs assistants who were deputed to help distribute famine relief funds, particularly since the relief effort had recently been stigmatized by charges of corruption.

When Morse went on his mission into southeastern Chihli province, he traveled through the North China plain on its eastern side. The plain has a diameter of some five hundred miles, from the sea south of Tientsin to the mountain ranges of Shansi province and from the Great Wall southward to the Huai River basin. While these boundaries are indistinct, a characteristic of the whole region is that it is a drainage area in which water from the
mountainous west makes its way toward the coast. The region has a number of watercourses, both rivers and canals, and along the route where Morse made his trip there was still no lack of water for daily necessities or even for transport on canals. The problem was inadequate rainfall for crops. Using muscle power on treadle pumps to lift irrigation water onto fields could not make up for the lack of rain. The fields were dry, parched, and unproductive.

Morse and Farago set out on June 27, 1878, but met continual delays. First, the carts promised by an official arrived only at 8:00 P.M.—too late to go on. Second, once started, it took three hours to cover eighteen li (about six miles) to a certain dam where boats had been requisitioned by the soldiers who accompanied the party. A victim of typhus was claimed to be aboard one boat, but the malady proved to be only indigestion; a second boat had only a fourteen-year-old boy left on board, though Morse noted that he “turned out to be the best boatman of the lot”; and the third boat “had accidentally lost nearly all her flooring planks.” They added a fourth boat (a ts’ao-tzu or “double-ender”) and found volunteers to fill out the crews, each presumably three persons. We may assume the party included one or two minor officials, soldiers, a cook, and personal servants, as well as luggage. Morse and Farago’s boat was under the direction of two men and an old woman. 24

The next twenty-eight hours took them through an “inland sea,” one of the lakes below Tientsin on the swampy east coast of Chihli. Banks appeared—about two miles distant on either side—and in one area they followed a channel five to ten feet wide through rushes. Eventually they began to ascend a fast-flowing river and passed under a dozen low bridges, at each of which the mat housing on the boats had to be carefully taken down. On the fifth day they arrived within a mile of Ho-chien fu and “went in a drenching rain” to call on the prefect. “He received us well and promised to send carts to convey us to Hsien-hsien.” This cart trip took about eight hours. 25

Morse and Farago were under orders to find the provincial relief commissioner, Sheng Hsüan-huai, a key member of Li Hung-chang’s team of young administrators already active in a variety of modernization projects. 26 At the age of thirty-four, Sheng held the rank of a taotai waiting-to-be-appointed (hou-pu tao). Sheng was a rising star in Li’s industrial empire, as we shall see. On July 4 he came north forty-five miles from Ching-chou to Hsien-hsien to discuss with Morse and Farago “the advisability of distributing cash instead of silver.” The five thousand taels’ worth of silver
they had brought with them (presumably in the form of the various silver dollars used in China’s foreign trade) could not be handed out to peasants. Sheng exchanged these dollars for the equivalent of fifteen thousand strings (\textit{tiao}) of copper cash, nominally one thousand cash each—which at the local exchange ratio of three \textit{tiao} to one silver tael or “ounce” (\textit{liang}) came out to about five thousand taels. One string plus one peck (\textit{tou}) of grain would be given each adult registered as a famine victim. Since the sixty thousand taels sent by Governor-general Li to Sheng had already been exhausted, the foreign Relief Committee’s five thousand taels was much appreciated.\textsuperscript{27}

On July 5 Sheng Hsüan-huai and the two Customs men established themselves at the large house of a gentry family named Chi who sent sixty or seventy carts to bring the cash and grain to their village, located about thirty miles east of Hsien-hsien. This village served as a distribution center. Morse later superintended distribution at branch depots four miles south (July 12–13), ten miles southwest (July 17), and thirteen miles west (July 18). “In this way, “wrote Sheng,” we distributed in 226 villages to 13,748 families the amount of 20,318 \textit{tiao} of cash and about 2100 piculs of rice (say 70,000 lbs.).”\textsuperscript{28}

By July 1878 the climate was fine, and new crops would be ripe in a couple of months. The problem was to sustain the victims of the 1876–77 famine until that time. Sheng reported: “The extremely poor had supported themselves during the winter months on the bark of trees and the product of the sale of the woodwork and thatch of their cottages; with spring and summer they found a more abundant, though no more satisfactory, source of food in the weeds and grass of the fields. . . . The effects of a weed diet are manifest in the starved look on the face, the care for nothing expression of the eyes, the wasted and fleshless limbs and body, and the great protruding belly.”\textsuperscript{29}

Morse’s record of events for the summer of 1878 contains the following entries:

\textit{July 3. Tuchangyi.} The inn-keeper told me that formerly there were many dogs in the village, but now there were none, as they had all been eaten. \textit{All} the houses had lost their woodwork—fuel.

\textit{July 4.} Sheng Taotai arrived. I mentioned my instr’ns to give 1 tael (6 s.) a head as relief; he said that was too much—1 \textit{tiao} (2 s.) would suffice until the crops were harvested. 1 \textit{tiao} cash [and] 1 picul rice.

\textit{July 6.} Sheng Taotai informed me that human flesh had certainly been eaten in Shansi, but not in Chihli. Children had of course been sold—especially girls—to be taken South. . . . The appearance of the
children is most horrible—mere bones, with the skin dried on them, pot bellies (their food is weeds and the bark of trees), faces pale, haggard, eyes staring.

July 7. Distribution in seven villages. The misery in all extreme. . . . I had to witness the most trying effects of famine and disease . . . [and] at the end of the work felt quite sick.

July 12. Sheng Taotai spoke of greater distress in other neighboring districts, in which relief had already been distributed.

July 14. Hwaichen—a large market town of 5000 inhabitants, a great proportion of whom are traders, who can usually manage to scrape together a few cash. This village has during the present year (1878) lost 800 from cold, famine, fever, and the fever (typhus) is still prevalent. Families have been completely swept away. . . . Families reported in the register (compiled in May–June) to be six were found to have lost three to four in the interval of a month; others reported as three, had become extinct. One family, twelve in May, reduced in July to four, the eldest a boy of 12 years. 30

Morse’s report to Detring cited other cases. “A family presented themselves before us when we called, the father age 60 and three sons aged from 25 to 40, four gaunt figures; the questions were asked, the register compared, the amount fixed, and the father told to rise to receive his tickets. He could not do it; in that one minute, the old man, overcome by the excitement acting on his weakened frame, had died before us of starvation.” 31

Morse’s experiences in famine relief must have left him with a number of different and sometimes conflicting impressions. On the one hand, he witnessed the docile fatalism of a starving populace; on the other, he saw the superior and evidently well-preserved capacity of the Chi family to send out dozens of carts to bring copper cash and grain to their village as a distribution center. The Chinese, for their part, discovered a side to Westerners they could not have anticipated and seldom saw. Morse reports that the beneficiaries of famine relief “were full of admiration for generosity which could send money to utter strangers.” Even gentry members and the local magistrate admired the “disinterested generosity” of foreigners “who had been so liberal without knowing to whom their relief would go.” 32 At this point a missionary might well have made a pitch for Christianity’s having a wider scope than Confucianism.

Farago went back to Tientsin on July 10, but Morse kept on working. His days ran from 5:30 a.m. to 9:00 p.m., and he developed a fever of 105, as well as periodic headaches. But ever conscious of his
duty as a Customs official to be an agent of "progress," he served as Sheng Hsüan-huai's private adviser for more than a week. The two men talked at length about devices such as the artesian well and the windmill-and-endless-chain pump, and apparently Morse made some headway with Sheng. They started back on July 20 and reached Tientsin via the Grand Canal on July 22. The two men would later have much to do with one another (see chapter 5).

At Peking

Good fortune came Morse's way later in 1878. A posting to the I.G.'s office at the capital was the prize of the Customs Service, and Morse managed to get there after only four years in China. He later explained: "Detring was not liked at the Inspectorate and the staff wishing reinforcement suggested that, if I could be sent off on special duty [such as famine work] I could be well spared from the Tientsin staff; so (Robert Hart being in Europe) R.E. Bredon [Hart's brother in-law and locum tenens] transferred me to Peking."35

Unlike the new foreign settlement in the concession areas outside Tientsin, Peking was an imperial capital that for centuries had welcomed foreigners bearing tribute from other parts of the world. The Western legations, with Great Britain at the forefront, made no sign of offering tribute after 1860, but they still could be tolerated within the old city. Two other groups completed the foreign community: Customs personnel and missionaries. Western merchants were conspicuous by their absence. The city, even to Victorian eyes, was a mixture of splendor and squalor. Mandarins in robes of silk and sable and Manchu ladies in bright colors, free to walk about on their unbound feet, crowded the muddy, rutted streets, from time to time blocked by wedding and funeral processions. Hawkers and peddlers took many necessities door to door, the clack of their castanets, the specialized calls of their musical instruments, and the shrill strains of their trumpets filling the air. People, fresh water, and goods traveled by mule litters, wheelbarrows, sedan chairs, and a multitude of carts. Rickshas had not yet made their appearance in the capital.36

Here again Morse quickly fitted in. He recalled that "in the winter of 1878–9 and spring I did duty at the T‘ung-wen Kuan [usually translated as Interpreters College] for four months as Professor of English."37 This innovative institution was created by Hart and headed by the missionary W.A.P. Martin to train Chinese for diplomatic relations. It faced all the
problems of bringing Western learning into the Chinese language, beginning with the translation of textbooks on international law. The T’ung-wen kuan gave Morse direct contact with Chinese and Manchu students who were members of the official class selected to study the Westerners’ language and curious ways. This was an opportunity not available to Western merchants in the port cities, where upper-class Chinese were few and generally hard to see, except formally as officials.

At the inspectorate general Morse was still low man on the ladder of rank and once again served as the mailman:

At Peking I had to stay in on three afternoons a week to make up the outgoing mails, but, as the only other men then on the staff had the rank of Commissioner or Deputy Comm’r, I received no extraneous help; the sorting inwards (except for the missionaries) gave very little trouble, since each legation had its mails in its own bags sealed from its own consulate. It was a proud moment (I was young then) when I signed a circular which I sent around instructing the Several Envoys Extraordinary and Ministers Plenipotentiary as to the machinery for the winter mails. The hours of departure were fixed—at Peking the couriers had to be out through the gates before they were closed at sunset. Incoming mails were watched for by servants from each legation, mission, or firm, and the recipients had to wait until I was ready to distribute to all.38

One could not play favorites in dispensing possibly important news from the outside world.

While the British in India escaped the summer heat of the plains only by long journeys up the foothills of the Himalayas to stations like Simla or Darjeeling, the rulers at Peking found relief close at hand in the Western Hills (Hsi-shan). In the 1870s the Manchu Empress Dowager Tz’u-hsi was just beginning to feather her nest at the Summer Palace, located with its big expensive Kunming lake between the northwest city gate and the Jade Fountain Pagoda, one of Peking’s main water supplies. The Hunting Park further on was still a Ch’ing dynasty preserve, but temples like that of the Sleeping Buddha (Wo Fo Ssu), with a recumbent figure fifty-four feet long, were open to ordinary mortals, including the new adjunct rulers of China who now inhabited the foreign legations. When John Fairbank wrote Morse in 1932 that he and his wife had had their honeymoon in the summer house of a kind friend (Dr. Robert Gailey of Princeton and the YMCA) at Wo Fo Ssu, Morse replied, “One summer (1878 or 1879) I spent a weekend (as we
call it now) at the Wo Fo Sze in company with Byron Brenan and B.C.G. Scott of the British legation, both now [1933] in a better world. We had four full days and went swimming in the pool every day and even now I can smell (in memory) the sweet-scented violets that met us on the breeze as we climbed by the pass into the next valley. Many such visits we had, Robin (my pony) and I in those two years.”39

Brenan and Scott were, respectively, eight and nine years older than Morse. They had both started out as student interpreters. In 1878–80 Brenan served as acting Chinese secretary in the British Legation. His final post was as consul-general at Shanghai in 1889–1901. Scott would finish as consul-general at Canton in 1900–1901. Undoubtedly trained in both Greek and Latin, they found in Morse a New England cousin, equally committed to a civil service calling in China.

In February 1879 Morse in Peking wrote two letters that were published in Boston in the Weekly Advertiser on March 27. In them he supported the effort of Francis P. Knight, American consul at Newchang, to arrange that Chinese be taught at Harvard. Hart himself had doubts about the efficacy of teaching Chinese at Harvard by the informant method used in the treaty ports. Nevertheless, the amiable Ko K’un-hua went to Cambridge in late 1879, and the attempt was made. By the time of Ko’s untimely death in February 1882, the Chinese Educational Mission headed by Yung Wing (Yale, 1854) at Hartford, Connecticut, had been terminated, and Sino-American cultural relations were being overshadowed by the Chinese exclusion movement in California.40 Morse’s urging that Harvard keep up with Yale and Oxford therefore achieved no institutional result. Chinese would not be taught again at Harvard until the 1920s.

Morse’s letters to the Weekly Advertiser made two important points about the Chinese language. The first was that ignorance of Chinese had caused American merchants to lose their trade to their erstwhile Chinese employees. The second was that this ignorance had allowed American consuls to be scandalously exploited by their Chinese interpreters. As Morse put it, if the pilot of a ship wants to legalize his “piracy,” he goes to the Chinese interpreter at the U.S. consulate and supplies him with the proper fee. The interpreter, in turn, “provides him with a pass in Chinese, duly stamped with the United States Consular Seal, under which he may henceforth plunder the fishing boats with impunity. [If] the pirate (pilot)... [gets] into trouble with his malpractice the interpreter (again properly fed)... [uses] the name of the consul, but (presumably) without his knowledge, [to write] to the Chinese authorities demanding to know by what right the
American eagle, engraved on the consular seal, has been disgraced, and insisting on the release of the man to whom the pass had been granted." Morse’s remedy for this disgraceful American incompetence was to train as interpreters selected young men who could rise through examination into a consular service designed on the British model, much as the Germans were beginning to do. Here again, not yet twenty-five, he was a visionary. The United States would set up such a service only in 1924.

As matters developed, officers of the Customs Service, which had begun as an offshoot of the British Consular Service in China, would continue to find that their natural counterparts and allies were British. The American consuls would be a hit-and-miss lot of merchants, missionaries, and political appointees, seldom professionals.

The Visit of Ulysses S. Grant

Young Morse got a view of the primitive state of Sino-American relations when former president U.S. Grant visited North China in June 1879. The diplomatic essence of this visit was that Li Hung-chang at Tientsin and Prince Kung at Peking had laid themselves out in sumptuous entertainments and intimate tête-à-têtes in order to get the great American’s help against Japan. The issue was Japan’s successful annexation in April 1879 of the Liu-ch’iu (Ryūkyū) Islands, a small maritime kingdom that had been an entrepôt for Chinese-Japanese trade and had sent tribute to both countries. The Chinese asked Grant to intercede with Japan. Grant shrewdly agreed to do so if China would leave the issue of California’s exclusion of Chinese immigration in abeyance. As it turned out, the former president’s intercession got nowhere, and China had to tolerate Chinese exclusion.

From the relatively modern ambience of Tientsin, the Grant party had to go on safari to reach Peking—first by houseboat for three days on the canal, then by cart, horseback, or palanquin fifteen miles from Tungchow, the head of navigation, to the walls and gates of the still medieval capital city. In Peking’s welcoming of the renowned general, Morse was ubiquitous:

They [the Grant party] must have thought that I was IT in Peking since I met them in seven capacities: one, member of [British] community at reception at the British Legation, second, member of American community at the American Legation, third, member of Customs staff reception at Robert Hart’s, fourth, former professor in reception at the
Tung-wen Kuan, fifth, general interpreter (Holcombe [U.S.] charge-d'affaires, being too busy with ceremonies) especially interpreting at the banquet at the Tsungli yamen, sixth, as an intimate friend of Chester Holcombe, the American minister, and seven, petted by Mrs. Grant as the classmate at Harvard in 1874 of her youngest son, U.S. Grant, Jr.\textsuperscript{44}

On state occasions, in the era before electronics made possible simultaneous translation, the interpreter was in the spotlight, the one man who addressed both parties. Morse's interpreting at the Tsungli Yamen banquet for General Grant was a distinct feather in his cap at the tender age of twenty-three.

The extraordinary traveler-observer Constance F. Gordon Cumming provides a revealing sidelight on Grant's visit to Peking. Her journal, \textit{Wanderings in China}, recounts on June 5, 1879, the colors, smells, and dusty discomforts met with on the journey from Tientsin to Peking that paralleled Grant's two days before. "Driving alongside of the road," she writes, "the dust was not quite so bad... [as it was when the Grant party was] escorted to Peking by civil and military authorities—an honour which well nigh resulted in suffocation!"\textsuperscript{45} On June 6, guided by the experienced mission sinologue Dr. Joseph Edkins, Gordon Cumming inspected and sketched the Temple of Heaven. She even ascended the great triple-tiered outdoor marble altar before the Grant party arrived on the scene by special arrangement of the American charge-d'affaires (though Mrs. Grant was excluded).\textsuperscript{46} For the historian it is a bit startling to realize that the conduct of the privileged foreigners was already as free and easy during the late Ch'ing period, in 1879, as it would be later under the Republic. Westerners walked on the city wall, entered all the temples and alleyways—except those of the Forbidden City—and vacationed in the Western Hills. No wonder Peking cast a spell over so many of them.
Rising in the Service
1879–1885

As in any bureaucracy, Robert Hart in the Customs Service had to keep looking for talent capable of rising to top positions. Morse had from the first been in this promising category. His early assignments were out of the ordinary and gave him a breadth of experience not granted to most of his competitors. This became evident when Hart sent him to London in 1879. At the time Great Britain was riding high. It was one of the three greatest industrial powers on earth, and the British were busily engaged in extending and consolidating their empire and trading relationships all over the globe. London, unparalleled as an international financial center, was full of vigor and lively events. Morse, ever alert, inquisitive, and energetic, took full advantage of the professional, intellectual, and social opportunities the vibrant city provided.

At the London Office

The London office of the inspectorate general was opened in March 1874 at 8, Storey’s Gate, Westminster, in a suite of rooms with “three bow windows overlooking Birdcage Walk” and “a delightful view of St. James’s Park.” The head, James Duncan Campbell, extolled it as a *rus in urbe*. The plumbing was antiquated but the ambience inviting. Campbell’s working day lasted from 10:30 to 7:00, and he often spent Sundays writing to Hart at the office, where he could, if necessary, stay overnight. His earlier service in the British Treasury, including five years in the Audit Office, had given him an inside view of Her Majesty’s government. In his later years Campbell “bore a remarkable resemblance to the late Lord Salisbury, and he was often mistaken for that eminent statesman during his daily walk over the bridge in St. James’s Park to luncheon at the Thatched House Club in St. James’s Street.”

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Campbell’s office was an essential part of the institution that Robert Hart was building in China. Its functions illustrated how far the Customs was truly a Sino-British creation. First of all, it centralized Chinese Customs purchases of everything from stationery to gunboats. Second, it procured personnel, examining and passing or rejecting an endless flow of British and other European recruits or applicants for Customs posts in China. Third, it operated as a quasi-diplomatic legation that could represent Chinese interests in direct dealings with the British government or public, or with others in Europe. In this latter capacity the London office also served as an invaluable source of informal intelligence for Hart.

Above all, the London office embodied the personal connection that Hart had developed with Campbell as his faithful “non-resident secretary.” Hart’s 1,437 letters to Campbell from 1868 to 1907 are a great archival source, as yet hardly used by scholars. Campbell’s letters to Hart were finally published in China in 1990 and provide much information about Morse and the Customs Service in general. After Campbell had done Hart’s bidding for ten years, and after Hart had seen the London office himself during his 1878-79 year in Europe, the I.G. decided that Campbell needed an assistant who could share the burden of work and take Campbell’s place if necessary. Also, said Hart, “[W]e ought . . . to give a little training to some of our men.” At the time, Campbell’s underlings were Henry Brazier and Francis Taylor. Once back in Peking, Hart wrote on September 17, 1879, “I am sending you an American, Morse, from my office here, to take Brazier’s place: he is a capital office man, and after you have improved his writing a little, you will find him faultless. Through him you had better strike up an acquaintance with the U.S. Legation in London. His pay is £500, and we shall have to give him quarters—bedroom and sitting room. I shall advise him to take Brazier’s, so as to work up his French. His Chinese is very good, and he has a good acquaintance with our work generally.” He went on to say, “As I intend to send you a man every year from China, it will be necessary for you to warn him on entering your office that the work there is confidential and must not be talked or written about to either Customs’ people or outsiders: for this purpose I enclose a few words that you are to read to each man on arrival. It will be well to copy them into some book in your office, and let each man sign the book after reading the warning.”

Subsequently Hart repeated his encomium: “I hope you will like Morse, he is a very intelligent, well educated man, and does his work thoroughly well.” Morse later recalled: “The I.G. early in October 1879
sent for me to come to his office—‘How would you like to go to the London office?’ I smiled on the idea. So I was packed off to Shanghai, thence by the old Messageries Maritimes single cylinder boat ‘Tigre’ and arrived in London at the end of November. I was the first man to be sent from China.”

Campbell received the news unenthusiastically. “I am very glad,” he wrote, “to hear you intend sending me a tried man in the Service to take Taylor’s place; but this office really requires a permanent Chief-Clerk; it will take years for a young man to acquire the experience and savoir faire which Taylor now possesses.” On November 28, 1879, Campbell dutifully reported Morse’s arrival, noting: “Brazier has been living in the neighborhood of Richmond for many months past; and the French Family, with whom he used to live, have their house full. So Morse has taken Cartwright’s rooms at Bayswater, till he can suit himself with others.”

In 1931 Morse the historian neatly summarized his duties in the London office: “[I] bought supplies, shipped buoy moorings, [and] dioptric lights, examined applicants for the service, ... paid off the crews of the gunboats, when they were repatriated, and superintended the construction of the gunboats Ch’ao-yung [Ch’ao-yang] and Yangwei [Yang-wei]. The best fun was bearleading Admiral Ting Jun’’ang [Ting Ju-ch’ang], who brought two Chinese crews to Newcastle-on-Tyne to take the boats out to China.”

This summary reflects several important aspects of Customs work generally. First, the Customs Service effected the improvement of Chinese navigational facilities. In the late 1870s the Customs Marine Department was still in the process of installing aids to navigation that would help ships traverse Chinese coastal waters and enter treaty port harbors safely. The new style of refractive (dioptric) lights were for lighthouses, and Morse made a special point of mastering the technology. His memo on the South Cape light on Taiwan that went into operation on April 1, 1883, received particular commendation from Hart.

Second, the London office played the principal role in selecting European and American applicants for Customs posts in China. Hart retained the last word, but Campbell did the interviewing, appraising, and setting of examinations. As Campbell’s close assistant, Morse met dozens of young men eager to follow in his footsteps. They came from France, Germany, and other countries as well as Great Britain, and we may assume that over time, and with experience, Morse helped judge their character as well as their proficiency and suitability for Hart’s cosmopolitan civil service.

Third, the London office directed the flow of British-built warships headed for China’s incipient Peiyang (Northern Sea) navy, which was then
being organized by the ambitious governor-general of Chihli province, Li Hung-chang. Hart served as the promoter and purchasing agent for this bold modernizing venture, although his amateur naval ideas seem on balance to have been a menace. He favored rams on all ships, waffled on ironclads, and was rather taken with one single-gun vessel whose eighty-ton cannon would sink anything it hit, provided it was not sunk first. Li, who found himself competing not only with the Japanese but also with China’s own Nanyang (Southern Sea) command, had no naval background and little expertise but an abiding infatuation with torpedoes. In all, the two men did not make a particularly adept team of military planners.11

Morse in London during the early 1880s witnessed the early phase of a prolonged confusion in Chinese naval affairs. In 1880–81 Armstrong built two small cruisers for Li: the Ch’ao-yang and its sister ship, the Yang-wei. Both were unarmored steel-ram cruisers of 1,353 tons; they were 210 feet long and capable of fifteen or sixteen knots. The twin screws used 2,000 horsepower. The chief armament was two ten-inch Armstrong guns with three fixed torpedo tubes. Each carried a crew of 130 men. Unfortunately, however, the Ch’ao-yang and the Yang-wei proved to be almost wholly ineffective. Recent research on China’s navy-building effort reveals that the first dozen gunboats procured through Hart, which included these two ships, carried cannon too heavy for the hulls. Extremely difficult to maneuver, they were also slow, obliged in the end to stay in port, unable to fight.12

On August 9, 1881, the two vessels, under the command of Admiral Ting Ju-ch’ang, cleared Newcastle for China. It was not an auspicious trip home. In Morse’s words, “Unhappily Ting later shoaled his ship and the Yangwei ran out of coal and drifted about the Mediterranean for two days.”13 These humiliating events presaged later naval disasters. During the Sino-Japanese War of 1894–95 both ships were destroyed, along with most of the rest of the Peiyang fleet. Ting, the honest but hopelessly outclassed cavalryman who superintended much of China’s navy-building effort, committed suicide after the debacle.14

Morse’s term bearleading suggests that his Chinese language skills may have given him a significant diplomatic role to play, at least occasionally, in London. It evokes an image of his conducting the exotic admiral through the ceremonies connected with his naval mission. Although Morse had little or no interpreting to do under the circumstances (the Chinese employed their own interpreters in most formal situations), his facility with the language gave him a certain degree of prestige. For this reason Campbell
found it useful to take Morse with him when returning visits to Chinese officials. Morse’s conversations with these functionaries yielded valuable information about Ch’ing politics, some of which he included in memos to Campbell. At the same time Morse’s diplomatic successes enhanced his reputation with Li Hung-chang, leader of China’s modernization effort and collector of talented Chinese and foreign assistants.  

Morse’s language ability also enabled him to give Chinese lessons to Francis Taylor two evenings a week. This did not entirely please Campbell, however. In a letter dated March 5, 1880, Hart’s “non-resident secretary” told his boss: “Taylor & Morse get on very well together—if anything they are rather too ‘thick.’ Morse being senior to Taylor, Taylor did not like to give Morse work to do as he would Brazier, and Morse not knowing the work, Taylor tried to do more than he could manage—hence the arrears which I hope to clear off in a few days.” Despite Morse’s obvious virtues and his undeniable contributions to the London office, Campbell’s reports to the I.G. reflect growing frustration with his American colleague. On June 11 he informed Hart with undisguised irritation that Morse had requested six weeks’ leave because he was “very anxious to see his friends & be present at some anniversary of his College.” In the same letter Campbell complained that Morse “does not work like Taylor: he does the work I gave him to do well & quickly, but it has to be given to him; he does not anticipate work or do it of his own accord.” By late July 1880 Campbell’s opinion of Morse had sunk so low that he stated outright: “I fear his disposition & character are not well suited for the peculiar duties of this office and that he is more of an inquisitive than of an enquiring turn in official matters.”

What accounts for Campbell’s growing dissatisfaction with Morse? Apparently Hosea remained too “American” for his superior’s British tastes. In a blunt and bitter letter to Hart dated October 8, 1880, Campbell wrote: “Mr. Morse is going to marry a young American lady he met at Richmond. He will be doubly American now. It is a pity he is so prejudiced in favour of everything American. Nothing is good in his eyes but what is American—the best men in our service for talent and work are Americans! etc. So long as he gives way to such feelings or does not restrain his disposition to argue the point when any one disagrees with him, he is not likely to get on with the Englishmen which this office brings him in contact with.” Campbell hastened to add, however: “I leave myself out of the question—I have not had the slightest cause myself to feel in any way dissatisfied with the manner in which Mr. Morse conducts himself in my presence and does his work. There is no doubt he is both clever and intelligent; and, during the three
weeks Taylor has been away for a holiday, he has done all the work to my entire satisfaction. Perhaps, when he sees more of England, he will change for the better.\textsuperscript{20}

In the end Campbell came to believe that Morse's fiancée would exert a salutary influence on him, which she apparently did. A letter dated January 14, 1881, makes the point this way:

Mr. Morse is to be married on the 8th of February. He does not look so happy as he ought on the eve of such an event. The young lady, I hear, is a little older than himself; she has spent half her life in England and half in America. Her Father is English by birth, but a naturalized American; and she has two Brothers studying in Oxford or Cambridge. Morse has certainly improved during the last few months, by being \textit{more} English and \textit{less} American in \textit{many} ways: if he becomes half-English and half-American he will have acquired the happy medium, which he acknowledges to be one of the qualifications of the lady he is to marry.\textsuperscript{21}

By the spring of 1881 Morse had become sufficiently Anglicized to meet with Campbell's unqualified approval; and from this point onward he became a mainstay of the London office. Campbell now treated Morse as a protégé and made a special effort to refine his accounting skills, so that he would "know the why and wherefore [of procedures] at each step."\textsuperscript{22} Campbell's letters to Hart display a growing enthusiasm for the young American's contributions. On May 6, 1881, for instance, he wrote that "Morse has been of great assistance to me" in negotiations concerning gunboats at Newcastle; and on November 4 of the same year he enthused: "Morse does his work steadily, carefully, and zealously: and I shall be as sorry to lose him as I was to lose Taylor."\textsuperscript{23}

Morse, of course, also benefited from the partnership. In addition to gaining a wealth of practical knowledge, he acquired a valuable network of personal connections (known in Chinese as \textit{kuan-hsi}). In fact, as a member of Campbell's staff he probably had as many of the contacts available to him in the West End as he would have had in Shanghai. Bright spirits and ambitious careerists frequented the London office of China's Customs Service, and Morse was in on the ground floor as the first officer assigned to London from China. He was succeeded by other rising stars of the service: H.M. Hillier, Alfred E. Hippisley, F.R. Taylor, and Paul King.\textsuperscript{24}

Outside office hours Morse expanded his circle of influential acquaintances by joining the Royal Asiatic Society in 1880–81. Founded in
1824, it brought together mainly aristocratic former governors of India and the sprinkling of Orientalists who had thus far emerged in Britain. Its scholarly achievements were far from comparable with those of the Royal Society, but its meetings served as a rendezvous for persons interested in Asia. No doubt Morse was inspired by the example of the vigorous North China Branch of the Royal Asiatic Society that had begun to publish its journal in Shanghai in 1858–60 and then continued it in 1864 and thereafter.

Unlike the Hong Kong Branch of the Royal Asiatic Society that flourished only from 1847 to 1859 (to be resuscitated in 1960), the Northern Branch at Shanghai brought together the foreign elite who had studied Chinese and/or China as consuls, missionaries, or merchants. Their sinology was enterprising, and the membership of two hundred by 1874 included the Anglo-American pioneers in Chinese studies. Morse would join them when he was back in Shanghai in 1888. While in London in 1881 he also became a fellow of the Royal Geographical Society, then presided over by Sir Rutherford Alcock, the former British minister to Peking. In this way Morse was already in touch with the sinology of the time. It was still a rather antiquarian specialty in which Chinese participated only as teachers or walking dictionaries. Plainly, however, these scholarly connections were of importance at the time and crucial as foundations for Morse's second career as a historian.

Hart, meanwhile, was planning Morse's next step. In December 1881 he wrote to Campbell, "You can tell Morse that in May or June he will be released from duty in the London Office, and that I then expect him to take his turn to go on leave." Campbell replied in late February: "I have told Morse that he will be released from duty—and that you expect him to take his turn to go on leave.—He would like you to know that he is prepared to return to China without taking long leave, and would prefer doing so if it suited your arrangements. All the leave he would ask for would be two or three months, in order that he might go back by America and see his friends." That same day Campbell wrote again to Hart: "Morse seems very anxious to return to China as soon as you will let him.—He is afraid of losing his Chinese, having had no time or opportunity here for keeping it up in practice; and if he goes on leave, before returning to China, he will have been away 5 years.—Again, he feels himself to be in perfect health, and he grudges spending two of his best years doing nothing; whilst he will be better able to enjoy his leave when he is higher up in the service and enjoying higher pay." Campbell went on to say:
I have already expressed to you my appreciation of Morse's services, since he has been my right hand man. He has relieved me of a great deal of mechanical work, which he does better than I can . . . ; and, from the confidence I can place in the work he does and in his integrity, he has saved me from much anxiety. Should there be anything very important coming forward, I hope you will allow me to keep him à discrétion. He has had only seven weeks leave altogether since he has been in the L.O. He comes early in the morning and seldom goes before 6 or 7 o'clock—never leaving without enquiring if there is anything further to be done. Under these circumstances, it would be a pleasure to me if I could tell him from you, that he could return to China as soon as he liked. He never applied for three months' triennial leave in China, and if you could give him this amount of leave here, it would be all he would want.

Campbell's letter ends by pointing out that Morse would be "of great use" in explaining the London office accounts to his successor. Obviously Hosea came of age professionally during his time in London.

In June Morse applied for leave—not for two or three months as originally proposed, but for nearly a year. Hart compromised, telling Campbell: "Morse's marching orders have gone: leave and half pay from September '82 to April '83. Hillier ought to be with you in August. Morse's port on return will be S'hai." Campbell countered that Morse should stay for a week or two to train the new men, with "King taking over charge from Morse of the Registry and Accounts, whilst Hillier replaces King in the General Office." 31

Before taking his leave (in early August, as it happened), Morse investigated for Campbell the bonding warehouse regulations of various countries at the I.G.'s behest. His two reports, contained in a letter from Campbell to Hart, dated August 4, 1882, dealt primarily with the United States and France, since information about bonding in Russia, Germany, and the Netherlands proved difficult to come by. Campbell, pleased with this preliminary work, suggested further investigations by Morse: "A few weeks, probably, would suffice for him to obtain a practical acquaintance with the system of bonded warehouses in the country [U.K.]: he could go through a course of instruction at the Custom House and the E. & W. India docks. Having studied the English system, he could then learn the American, which, after the English, is probably the best. Should this suggestion meet with your approval, there will be time for me to receive your telegram before Morse leaving [sic] England." 32
A week later Campbell supplemented Morse’s report with additional information from Holland and Russia, noting that he had sent the I.G. by book post the German bonding regulations and would send the rules for France, Holland, Russia, and the United States as soon as he received them. By the fall of 1882, however, the immediate need for information on bonding had diminished. On October 6 Hart informed his London agent that “there is now no hurry about the [bonding] laws,” indicating that the principal concern of the Tsungli Yamen had been “the length of time various states allow goods to remain in Bond.” As for Morse, the I.G. was of the opinion that “Morse need not study Bonding.”

By the time Hart’s letter got to Campbell, Morse had already left London with the idea that he would study bonding while on leave in America. His Harvard class report of June 1884 states that he was “sent to this country [the United States] by the Chinese government to study the American custom house system and especially the warehouse methods of holding bonded goods.” Since neither Campbell nor Hart told Morse that his study was no longer necessary, he persevered, and eventually the knowledge he acquired paid off at Shanghai.

Marriage and Leave

As a twenty-five-year-old bachelor in a well-paid and already prestigious bureaucracy comparable to the Indian Civil Service, Morse was preeminently “eligible” for marriage. What specific opportunities arose we do not know, but his main achievement in London outside the office was finding a wife. His bride, Annie Josephine (“Nan”) Welsford, was the daughter of an English merchant, Joseph Welsford. He was born in London in 1812 and was in the 1880s a partner in the firm of Napier and Welsford of Liverpool and New York. Napier and Welsford were commission merchants like Jardine, Russell, Dent, and other firms in the China trade, who had (or hired) fleets of ships that carried wholesale cargoes for others to Brazil, China, and elsewhere around the world.

The business kept Joseph Welsford resident in New York until he returned to England in 1868, where he died in 1885. He had married Annie Elder, a woman of Scottish background. Nan, their first child, was born in Brooklyn, New York, in 1853. Of their eight children, two died in infancy. The three surviving sons all went to Cambridge University, one becoming a master at Harrow and the other two doctors. The youngest son-in-law also became a physician. By marrying into this educated, cosmopolitan family,
Morse moved further away from his own far more modest family background.

Nan had grown up in America, living there to the age of fifteen. A photograph of 1880 shows her to be a pretty young woman—just as Morse was a handsome young man. Nan probably had a somewhat romantic view of international trade and far-off places, having never actually lived in an exotic environment. Born a bit too early for college to be a likely option, she was nonetheless an accomplished young lady, who could sew a fine seam, play the piano, and paint watercolors. She was two years older than Morse and saw in him an attractive prospect. They were married at St. Matthew’s Church, Richmond, Surrey, on February 8, 1881. Their union lasted fifty-three years. After their marriage, they lived in a house owned or rented by Nan’s father at Kingston-on-Thames, Surrey, which they shared with her brother George Frederick, twenty-three, and Alice (Lal), the youngest in the family at fourteen. They never had any children. To the end of his life Morse was to be very much a part of his wife’s family. According to her relatives, she did not care at all for his.

If we had more of her letters or other writings, Nan Morse would be a fine subject for a biography that traces the penchants, moods, and ruminations of the principal as an obligato to a worldly career. The correspondence of those who knew her best certainly reveals that Nan was a strong and determined person—utterly, possessively devoted to her husband. Although initially comfortable with other people, she grew more demanding and difficult later in life. In particular, she came to despise and detest the Chinese. Whether it was hate at first sight or the result of bitter experience, frustration, isolation, and illness is extremely difficult to say. Likewise, we cannot easily determine the net effect of Nan’s personality and attitudes on Hosea’s overall life and career. These matters seem truly imponderable. Yet they lend interest to a fundamental question: How did service in the Maritime Customs affect family relationships? Robert Hart’s wife, Hester Jane Bredon, after fifteen years of on-site devotion, took off for London in 1882, and though she and Robert kept amicably in touch as a married couple, they did not meet again for twenty-four years.

In any case, Morse began his eight-month leave of absence from the Customs in the summer of 1882. As for other such periods, we have little direct record of where and how he spent his time. In part his leave was a working vacation. Not only did Morse investigate the bonding system in New York as initially charged, but he also undertook various other assignments on behalf of the Customs Service. For example, in a letter to Hart
dated February 23, 1883, Campbell reports: “I asked Morse to make some enquiries concerning the manufacture of lighthouse apparatus etc. in the United States; and I enclose a copy of what he has written to me on the subject.” Hart responded appreciatively, “Morse’s Memo is very good.”

While in New York the Morses must have spent time with George Marcus, one of Nan’s first cousins with whom she had grown up. They also no doubt visited George’s sister and her husband, Dr. Henry Pancoast, who lived in Germantown, Pennsylvania. In view of Morse’s deep Harvard loyalties, the couple would surely have seen Hosea’s classmates in the Cambridge area (recall Campbell’s letter to Hart in February 1880) and perhaps one or two of his local cousins as well. There is no record that Morse ever returned to see relatives in Nova Scotia after his marriage, but he evidently did stop in Omaha on the way back to China in order to introduce his bride to his father and mother, who had been living there for three years. Morse’s Harvard class report of June 1884 notes succinctly: “After a short vacation in this country [we] returned to China and arrived in Shanghai in April 1883.” From there, contrary to their original expectations, they went north to Tientsin, where Morse resumed his Customs duties.

**Tientsin Again**

Commissioner Detring had just gone to Europe, leaving Colin Matheson in charge. There is no explanation of why the I.G. shifted Morse from Shanghai at this time, but possibly Li Hung-chang or Detring requested him after hearing favorable reports from Chinese officials of his performance in London. In any case, this post was the first in his married life, and far pleasanter than later outposts were to be. Unfortunately, however, we know little about Morse’s activities in Tientsin. He was still too junior to be communicating directly with the I.G., and we have no other correspondence from his hand. Other sources help us to fill in the picture.

H.F. Merrill’s daughter described her family’s house in Tientsin as it was in 1906. We can imagine that the Morses lived in the same or a similar dwelling. She wrote,

> The Commissioner’s house was in the British concession. It was a long, rambling bungalow. The drawing room and dining room formed the main part of it and then [there] were wings going off at different points. My Mother’s sitting room, bedroom and bathroom were one wing. The opposite side of the house had wings containing guest rooms. It was
dark and gloomy. There was a long, enclosed veranda running the full length of the house in front and that was where we lived, as this was light and airy. One end was where we ate and the other end where we sat. Only in the evening and for formal occasions were the drawing room and dining room used.44

Tientsin had changed during Morse’s London years. An imposing new Customs complex now stood in the city, with “offices, dwelling houses of officials, gas works and stables all around.”45 There was also a branch of the Hong Kong–Shanghai Bank and a telegraph extending to Shanghai. Foreigners, notably the French, had built up the settlement and Bund, and new construction would continue throughout Morse’s term. Roads were improved and rerouted outside the settlement, although the Peking government still spurned a railroad between the two cities. The Temperance Hall provided a venue for lectures, parties, and the Masonic Ball. A drama society continued to flourish, but there is no evidence that Morse took part. When Viceroy Li was in residence, he provided band concerts at his gatherings. Hospitals of several sorts helped to handle illnesses that from time to time reached epidemic proportions.46 In the comparatively temperate weather, the Morses remained healthy throughout Hosea’s tour of duty. This was not to be the case in other less clement situations.

Trade went forward at Tientsin, but slowly.47 This was probably just as well, for it allowed Morse more time to become involved in diplomacy at a critical juncture in China’s foreign relations. During the early 1880s China faced foreign pressure on three major fronts: one was the Russo-Chinese border in the northwest; the other two were Korea in the north and Annam (Vietnam) in the south, both of which the Chinese considered to be “tributaries” (vassals) of the Middle Kingdom. Significantly, Hart and his subordinates became involved in negotiations surrounding all three trouble spots.48 Although China managed to avoid war with Russia in Central Asia and with Japan in Korea, hostilities broke out with the French in late 1883.

For a number of years, by means of both military aggression and clever negotiation, France had taken over much of Vietnam, callously disregarding China’s long-standing claim to sovereignty over the area. When the Vietnamese king requested help from China in accordance with his tributary status, the conservative faction in Peking known as the Purist Group (Ch’ing-liu tang) pressed the Ch’ing government to provide military assistance in accordance with time-honored Confucian principles. Under pressure from the shrill and idealistic Purists, Peking sent a number of
troops—first irregular "Black Flags" under Liu Yung-fu and then more regular forces—which occasionally clashed with the French. Li Hung-chang, however, cautioned against a major Chinese intervention, knowing only too well China's military and naval weakness.

In playing the peacemaker, Li sought the assistance of Detring, on whom he had long relied as his intermediary with Westerners. Detring, now back from his two-year leave in Europe and serving as commissioner of customs at Canton, began negotiating with the French in South China. In early April 1884, at Li's request and with Hart's blessing, the Tsungli Yamen summoned Detring to Tientsin "on special service" in connection with the delicate Sino-French negotiations, then conducted by Li and the French naval captain F.E. Fournier. According to the North China Herald, Detring did an excellent job. On May 16 the Herald reported, "The ground appears to have been so well-prepared by Mr. Detring that the drama is progressing like a play that has been carefully rehearsed."49 Although there is no record of Morse's activity in these negotiations, we may safely assume that he worked behind the scenes, especially considering his well-established relationship with both Detring and Li Hung-chang.

The Li-Fournier convention of May 1884 called for Chinese recognition of all French treaties with Vietnam and withdrawal of all Ch'ing troops from the northern border area. In return, the French promised that they would not demand an indemnity, that they would not invade China, and that they would not include references to China in any of their treaties that might "affect prejudicially the prestige of the Celestial Empire."50 For his efforts, "Mr. Detring received the approbation and thanks of the throne" and attended the signing ceremony and lavish dinner that followed.51

In fact, however, the Li-Fournier agreement failed to bring peace. In the first place, the war party in Peking vociferously denounced Li for his "cowardly" compromise and demanded his impeachment. Second, intimidated by the conservatives, Li failed to inform the court of the date stipulated for the withdrawal of Chinese troops. In the absence of any orders to retreat from Vietnam, Ch'ing forces reengaged the French, prompting accusations of bad faith. On August 23 French ships launched a fierce attack on the newly built and strategically important Foochow Shipyard, sinking or damaging the entire southern fleet in about an hour and destroying the naval facilities on land as well. The event was a major blow to China's self-strengthening program, not to mention its pride.52

Hart blamed Detring for the debacle. On December 5, 1884, he wrote: "If only Detring—instead of rushing into the matter at Canton, and
giving the French all they asked for, so hurriedly, at Tientsin—had kept out of it altogether, we should have had no war. The French and Chinese would have negotiated properly and calmly, and reached an indisputable settlement through the proper channel—the Diplomatic Minister,—and at the proper place—Peking.” 53 In fact, however, the Ch’ing court’s vacillation created the primary difficulties. In the words of Immanuel Hsu, “A firm war policy might have deterred French aggression and a persistent policy of peace might have spared the Fukien fleet and the Foochow Navy Yard. But ineffective leadership resulted in the destruction of both and the loss of the tributary status of Annam.” 54

In the end, Hart, with the assistance of Campbell in London, engineered a settlement in April 1885 along the general lines of the Li-Fournier convention. Although no indemnity had to be paid, China expended more than one hundred million taels on the conflict—an amount roughly equal to the annual income of the Ch’ing central government at the time.

Part of the postwar agreement concerned the exchange of French and Chinese prisoners. In July 1885 the I.G. released Morse to achieve this object. Morse later said that “someone was wanted not French nor British nor German; I was on the spot and so was sent to the Chinese admiral at Amoy and the French admiral at Makung (Pescadores).” 55 This arrangement showed the utility of Americans as neutrals among the competing Europeans. It also demonstrated how a foreign employee of China could be the operative member of a delegation headed pro forma by a Chinese official. 56 Morse was deputed by Li Hung-chang to go with Lo Chih-lu, expectant secretary of the Imperial Patent Office, to the Pescadores to receive more than eight hundred Chinese military and merchant prisoners taken by the French from the steamship P’ing An (“Peace”) and elsewhere in the recent hostilities. Nine French prisoners were to be released by China in exchange. 57

This proved to be essentially a diplomatic exercise. Through P. Ristelhueber at the French Legation, Morse secured a note of introduction to Admiral Lespès and also a letter from the French minister, Patenôtre. Morse and Lo arrived at Amoy on Li Hung-chang’s steamship Leeyuan (Li-yuan) and asked the Chinese admiral, P’eng Yü-lin, for a naval escort before going on to the Pescadores, where the exchange was effected at the main port of Ma-kung. On July 1 Hosea received a note from Admiral Lespès acknowledging receipt of Morse’s letter indicating certain changes for the record. “The figures have been corrected,” Lespès stated. “Their differences from those of yesterday could only come from recent escapes.
(evasions) but in that I see no inconvenience for my record. The important thing is that none remain on our hands, and so it is.”

Ostensibly for this service, Detring secured Hart’s consent to Morse’s receiving insignia of the Order of the Double Dragon (Shuang-lung pao-hsing), third division, second class. This order had been instituted on October 16, 1881, as a special honor for foreigners. First division was for sovereigns, second for ministers, and third for embassy personnel. Second class of the third division pertained to functionaries equivalent in rank to vice-consuls.

Setting up a system of honors and insignia for foreign employees was a useful incentive, one of the trappings of the Ch’ing bureaucracy. Hart appreciated his Chinese awards, and he both enjoyed and found useful the prestige of his Knight Commander of the Order of St. Michael and St. George, rendered for his Customs service by Queen Victoria in 1882. Morse, too, prized his honors. The Omaha Bee carried a long story about Hosea’s Double Dragon award, based primarily on a letter received by Albert Morse from one of his son’s colleagues in China. This rather exhuberant account indicated that the “decoration is thought a great deal of in China and the rank is above what his [Hosea’s] position would lead one to expect.” The account quite erroneously asserted, however, that the Double Dragon award corresponded to the British title of Companion of the Bath.

Hyperbole aside, Morse was clearly making his mark, impressing both Li Hung-chang and his superiors in the Customs Service with his administrative and diplomatic skills. Although originally appointed to Kiukiang, Morse received reassignment by Hart to the Shanghai Customs on Li’s recommendation. There he would be “detached to represent the [Chinese] Government at the directorate of the subsidized China Merchants’ Steam Navigation Company.” Meanwhile Morse had advanced to the rank of second assistant B in the Customs at a salary of 175 taels a month.
In July 1885 Li Hung-chang wanted two Americans for a pair of special assignments. One was “to take the China Merchants’ Steam Navigation Company’s fleet and property back from Russell & Co., and to stay with them and steer them.” The other was “to rescue Korea on the Customs side from P.G. Mollendorff.” Morse recalled: “I selected the CMSN Company and was [seconded from Customs] to them exactly two years. To Korea, he [Hart] sent H.F. Merrill on the Customs side and O.N. Denny [U.S. consul at Tientsin] on the diplomatic.” That Morse was able to make a choice indicates his favored position as a troubleshooter in the eyes of both Li and Detring. Why did he choose as he did? We can speculate. In the first place, Korea would have taken him out of a Chinese-speaking area to an exotic scene for which he had no special preparation. Moreover, he would have had to leave Shanghai—the central place of action in China—where Nan undoubtedly preferred to stay. Finally, the CMSN Company had been running twenty-four steamers to Chinese ports. It was a big show and must have seemed like the greater challenge (it probably was).

A Harvard Reunion in Shanghai

Before taking up his responsibilities with the China Merchants’ Steam Navigation Company, Morse faced a far more enjoyable prospect. In the fall of 1885 all four Harvard friends of the class of 1874 who had been recruited by E.B. Drew for the Customs Service happened to converge on Shanghai. They thus had the one reunion they ever managed to achieve. One gets the impression that Morse and his classmates had a certain bond of affection and rivalry, a bit like siblings. Their wives were concerned with their husbands’ status and the social amenities of living. The men were most
interested in the jobs they had to do, and here rank was often a secondary consideration. Drew, as their mentor and one of Hart's favorites, was beyond the competition. He had already gained the position of Shanghai commissioner, the top Customs post outside the inspectorate general's offices in Peking and Shanghai.³

Frank Spinney had gone directly to Amoy in 1874, and from there he went to Peking, where he served from 1880 to 1883. He spent part of his leave in charge of the Chinese exhibit at the New Orleans Exposition in 1884; a year later, when he arrived back in Shanghai with his vivacious bride, Annie (also called Nan), he was on his way to serve as acting deputy commissioner at Foochow. Charles Clarke had gone first to Hankow in 1874; then he was in Wuhu and Tientsin before a two-year leave from 1882 through 1884. In 1885 he was stationed in Shanghai. Henry Merrill, the fourth Harvard man, had gone in 1874 to the outports of Kiukiang and Takow in southern Taiwan, then to Amoy; he was on leave from 1882 to 1883. His leave was followed by a stint in Shanghai from November 1883 to the following September, then nine months back in Takow as assistant in charge. After spending the summer of 1885 in Peking, Merrill was on his way to Seoul, Korea, for four years' service as chief commissioner of customs.⁴

At the time of their 1885 meeting, all four men had advanced in the Customs Service. Their rank had risen from the original 4B to 3B for Morse and Merrill in 1880, and 3A for Spinney and Clarke. By 1883 Spinney was out in front, at rank 2A, with a temporary post in Peking as acting deputy commissioner, while Clarke, Morse, and Merrill were all still 2B. Drew arranged a dinner party for the four men. According to Merrill, they "talked over college days and [their] experiences and prospects in China." Later, thanks to a songbook brought by Spinney, they had "a great time singing college songs."⁵ Immediately after the party Merrill left for Tientsin, en route to Korea. The next day the Spinneys had tea with Nan Morse and dined with the Morses at the Clarkes' home.

Nan Spinney's letters of the period give us a feel for the lifestyle enjoyed by wives of Customs Service officials in major ports like Shanghai.⁶ Although we have no comparable materials from the pen of Nan Morse, it is not difficult to imagine that she shared Mrs. Spinney's sense of excitement over viewing "handsome new houses with fine gardens" and a country club with "eleven tennis courts, gardens, rustic bridges, [and] arbors." It was, Nan Spinney wrote, "like a garden party almost every afternoon." Although the Spinneys had nothing more to live on than Frank's salary and a moving
stipend, Nan was able to buy complete sets of dining room, living room, and bedroom furniture for their house in Foochow. As she told her mother: “The Customs furnish a gatekeeper, a gardener, a watchman and a house coolie, so all we have to get will be a boy (head boy), a cook and chair coolies. Chairs have almost disappeared in Shanghai, their place being more than filled by jin-rik-shas.’”

We have no way of knowing whether the Morses had the same amenities at Shanghai, but we can assume that they enjoyed a large measure of material comfort. On the other hand, Hosea’s professional life proved bitterly painful. Unlike Merrill, who experienced a considerable measure of success in Korea, Morse hit a dead end. In trying to “steer” the CMSN Company in the proper direction, he encountered all kinds of obstacles and ultimately fell victim to the rigid and irrational demands of the Ch’ing bureaucracy. His letter books bring out starkly the kinds of inefficiency and corruption he faced in working for the China Merchants’ Company.

Sino-Foreign Steamship Competition

Foreign business people involved in joint ventures with their Chinese counterparts in the 1980s and 1990s may take a wry interest in Morse’s experience, for although the economic, political, and legal environment in China has changed beyond recognition during the past century or so, many of the problems Morse had to confront in the nineteenth century still exist.

To understand Morse’s situation, let us begin with an overview. The steamship entered China’s domestic trade originally as a foreign means of outdoing the old Chinese junks. Opium imports and tea and silk exports, having high value in small bulk, lent themselves particularly to the early foreign semimonopoly of the interport steamship carrying trade in China. The long-established Chinese junk owners found their domestic sailing fleets outmoded and tried to protect their interests. In 1865, for example, they succeeded in having the acting governor of Kiangsu forbid Chinese merchants to employ foreign steamers. But the opportunity was too enticing, and Chinese capital proceeded to go into steamships in a variety of ways. First, Chinese merchants and officials invested in foreign-owned steamers. For instance, they provided a third of the capital for Russell and Company’s profitable Shanghai Steam Navigation Company, started in 1862. Then Chinese merchant-officials began to acquire steamships on their own, employing Westerners as captains and engineers. Hart had encouraged
rather than opposed this trend, and by 1867 the Chinese government issued regulations for the establishment of Chinese-owned steam shipping.\footnote{In 1872 Li Hung-chang took the lead in setting up China’s first joint-stock company, the China Merchants’ Steam Navigation Company.\footnote{In 1873 twenty-four regulations were issued for the Customs to enforce. Their effect was to bring Chinese-owned steamers into the treaty system administered by the Customs Service. Such vessels were to trade only at the treaty ports, paying the same treaty duties and obeying the same Customs regulations as foreign-owned steamers.\footnote{Thus the Maritime Customs extended its jurisdiction over Chinese-owned foreign-style vessels. Not to have done so would have created constant confusion—especially since these Chinese steamships employed foreigners as officers and engineers, thus scrambling Chinese and foreign personnel in the steamship business along with the ships.}}}

In 1872 Li Hung-chang took the lead in setting up China’s first joint-stock company, the China Merchants’ Steam Navigation Company.\footnote{Designed primarily to compete with foreign steamers in China’s coastal carrying trade, the CMSN Company was the first experiment in nonmilitary modern enterprise created under the traditional Chinese administrative formula known as “government-supervised merchant undertakings” (kuan-tu shang-pan). Crucial to its success, therefore, was the strong support of Governor-general Li Hung-chang at Tientsin. By virtue of his towering reputation and widespread connections during the 1870s and early 1880s, Li managed to encourage Chinese merchants to invest in the company, not only by allowing Tong to give them managerial responsibilities and protection from bureaucratic exploitation but also by securing low-interest (subsequently no-interest) loans from the Ch’ing government.\footnote{During the nine-year period 1873–82, the Chinese state subsidized the CMSN Company to the tune of more than one hundred thousand taels}}

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Though first set up in 1872, the China Merchants’ Steam Navigation Company became a formidable competitor in China’s carrying trade only after it purchased a fleet of sixteen ships from Russell and Company in 1877. It was a hybrid institution, acting partly like a capitalist entrepreneur and partly like a bureaucratic monopolist. Almost from the beginning the CMSN Company depended on government loans for support, and much of its success naturally depended on its leadership. From 1873 to 1883 the Cantonese Tong King-sing directed operations. Tong had been a comprador for Jardine Matheson from 1863 to 1873 and had learned something of Western entrepreneurial methods. As a result, Chinese merchants by and large controlled the management of the China Merchants’ Company, making it somewhat less bureaucratic than it would later become.\footnote{Designed primarily to compete with foreign steamers in China’s coastal carrying trade, the CMSN Company was the first experiment in nonmilitary modern enterprise created under the traditional Chinese administrative formula known as “government-supervised merchant undertakings” (kuan-tu shang-pan). Crucial to its success, therefore, was the strong support of Governor-general Li Hung-chang at Tientsin. By virtue of his towering reputation and widespread connections during the 1870s and early 1880s, Li managed to encourage Chinese merchants to invest in the company, not only by allowing Tong to give them managerial responsibilities and protection from bureaucratic exploitation but also by securing low-interest (subsequently no-interest) loans from the Ch’ing government.\footnote{During the nine-year period 1873–82, the Chinese state subsidized the CMSN Company to the tune of more than one hundred thousand taels}
per year. Shareholders enjoyed an average return of 20 percent per year. The China Merchants’ Company dominated the Shanghai-Hankow route on the Yangtze River as well as the Shanghai-Tientsin route on the coast. A pooling arrangement with the two British firms of Jardine Matheson and Butterfield and Swire gave the Chinese company more than 40 percent of the total earnings on these two routes. But disaster struck in the market collapse of 1883. Scores of Chinese banks went bankrupt, leading Chinese entrepreneurs were put out of action, and in 1884 Tong King-sing had to give up direction of the China Merchants’ Company. His place was taken by the mandarin entrepreneur Sheng Hsüan-huai, the most prominent official of Li Hung-chang’s entourage in promoting industrial projects. Sheng had previously been connected with the China Merchants’ Company, but not as the primary voice. Indeed, Li consistently resisted Sheng’s efforts to lead the company, wishing to minimize bureaucratic interference.14

The outbreak of the Sino-French hostilities in 1883 compounded the problems of the CMSN Company. This costly conflict not only drained away precious Ch’ing government revenues but also undermined Li Hung-chang’s prestige. The result was that the Chinese state lacked the financial resources to support all of its new-style economic enterprises, and Li no longer had the power either to resist the encroachments of the Chinese bureaucracy, which perennially wished to take over the company, or to inspire the confidence of merchant investors. Competition for scarce resources encouraged factional struggles among provincial modernizers, which led in turn to more government meddling. Beginning in 1885 the Board of Revenue began to monitor all aspects of the company’s operations, from income and expenditures to hiring and firing. Official meddling only increased thereafter. Meanwhile, strapped for funds and pressured to repay debts, the CMSN Company failed to invest in capital equipment at precisely the point when foreign steamship companies were undergoing rapid growth.15 Under these circumstances, Chinese bureaucratic behavior slipped downward to the lowest common denominator.

The Problem of Corruption

Albert Feuerwerker’s path-breaking study of Sheng Hsüan-huai and China’s early industrialization, published in 1958, laid out the evils that inhibited China’s industrial growth in the late nineteenth century. Monopolies, undercapitalization, lack of technical skills, poor management, and corruption aimed at the personal profit of officials all typified the kuan-tu
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shang-pan enterprises used by high officials like Li Hung-chang and his protégé Sheng Hsüan-huai to promote steamship lines, telegraphs, coal and iron mines, textile mills, steel works, railways, banks, and technical training institutes. The basic fault lay in the ancient custom of “becoming an official to get rich” (*tso-kuan fa-ts’ai*), which endured because the Ch’ing government’s sporadic efforts at reform had few long-term consequences, and officials were paid purely nominal salaries. 16 Hart saw the problem clearly in 1864. His journal entry for November 22, for example, states: “The curse of China is the small and insufficient pay of the officials, and from that has sprung forth a crop of what may be styled ‘flowers and thistles’—the thistles being downright extortion and peculation, the flowers being presents to people in office.” 17

How bad was the problem? One example should suffice: As Customs taotai at Tientsin under Li Hung-chang, Sheng Hsüan-huai was reported to make a personal profit of some two hundred thousand taels a year, more than a thousand times his official salary. In “mandarin enterprise,” as Feuerwerker calls it, the industrialist who headed a joint-stock company as chief shareholder was also a territorial official with an important patron and many connections. The state could not curb such men’s institutionalized greed because they represented the state. No laws could be enforced to control them. Their vision was that of here-and-now profiteers, not that of far-seeing public servants. Furthermore, these new Chinese enterprises were not wholly independent, because official funds and monopoly privileges gave them needed support and left them dependent on official approval.

The particularistic emphasis of Confucianism condoned and fostered this pattern of profit-taking to enrich and safeguard one’s family. The result was that officials invested their funds in land and pawnshops as ongoing security. They did not simply reinvest in order to build up the enterprise from which the funds had come. Furthermore, the Confucian family-centered ethic supported the precaution of nepotism. Family members were, by nature, more reliable—never mind their capacities. Here was another strong incentive to what the West called corruption.

Li Hung-chang himself found it impossible to carry out his modernizing projects without resorting to irregular means of raising revenue and to the expedient of paying bribes to get business done. By the 1880s the pattern of corruption had been firmly set. For instance, when Prince Ch’un requested in 1887 that Li forward funds earmarked for the Ch’ing navy to pay for the rebuilding of the Summer Palace, Li had to comply. During the same year, after the Ch’ing government relaxed its prohibition on Chinese
steam transport in the non-treaty port interior by allowing registered launches to ply inland waters with government stores, Li became a willing accomplice in the practice of using “official transports” to carry private cargo and passengers beyond the control of the inspectorate of customs.18

This trend was dramatically illustrated at the treaty port of Wuhu in December 1887. The steamship Leeyuan (Li-yuan), flying the Chinese flag and boasting a foreign master and a Chinese crew, arrived at Wuhu and began loading ten thousand bags of rice and one hundred bags of copper cash. When accosted by the local Customs authorities, the master confidently displayed a pass from the great Li Hung-chang, governor-general of Chihli and superintendent of trade for the northern ports. It exempted the vessel from the payment of tonnage dues and from all other customs procedures. Since the Maritime Customs as yet had no jurisdiction over China’s domestic trade, nothing more could be done.19 As high an official as Li, when law was not supreme, could be a law unto himself. It is hardly surprising, then, that H.B. Morse’s efforts to counter corruption in the China Merchants’ Company were foredoomed.

For perspective, we may note how that other new engine of transportation, the railroad, had spawned corruption in the United States at about the same time. In the middle of the Grant administration, for example, the Credit Mobilier scandal of 1872 revealed how the Union Pacific had bribed high American officials to further its interests. The bank crash of 1873 and years of depression ensued.20 One difference from China was that the Americans were better organized through the stock market and therefore paradoxically more vulnerable. Their leaders were also politicians more than bureaucrats, and thus more accountable. But a more fundamental difference distinguished the two societies: the capitalist market economy of the United States permitted financial corruption to contribute to the boom-and-bust business cycle, whereas corruption in China was a pervasive and persistent decentralized ailment of the fiscal system at all levels.

In short, China’s new enterprises of the 1870s and 1880s lacked the advantage of an American-style economic environment in which to operate. They were not wholly capitalist, because official funds and monopoly privileges gave them needed support. By the same token, they were not primarily productivity-oriented, because the officials, both as government representatives and as personal profiteers, were inclined to sequester the profits instead of plowing them back into the business. These new enterprises were not even wholly Chinese, because they relied upon the expert services of foreigners—for example, as engineers and captains on Chinese-
owned steamships. Morse served the China Merchants’ Company in yet another capacity—as a financial expert.

Yankee Idealism and Chinese Realities

We may wonder whether Morse ever fully understood the magnitude of the problems he would encounter in providing advice to the CMSN Company. Initially his task was a simple one: to assist in “the retransfer of the China Merchants’ Company’s steamers and other property,” which had been nominally “sold” to Russell and Company by secret agreement so that they would be immune to seizure by France during the Sino-French hostilities of 1883–85. Since Russell and Company was to go out of business in 1887, its ships were in the process of being “resold” to the China Merchants’ Company.21

Much of Morse’s work during 1885–86 seems to have been similar to that of an outside auditor—to ascertain the assets, debts and other liabilities, and future prospects of the company, judging by its records. Apparently his performance pleased Li Hung-chang, for Hart’s journal entry of December 4, 1885, indicates that Li made a special point of asking the I.G. not to move Morse from the CMSN Company because he was “doing so well.”22 Hosea’s masterly report of March 1886 drew up four accounts and foresaw a sound future if no dividends were paid out to the stockholders, who were mainly the directors under Sheng Hsüan-huai as director-general (tu-pan).23

Morse’s report indicates that the CMSN Company had acquired a good deal of property on land in addition to its fleet of twenty-five steamers. Its headquarters and principal warehouses (“godowns”) were in Shanghai. Along the China coast it had properties at Tientsin, Chefoo, Ningpo, Wenchow, Foochow, Swatow, Macao, and Hong Kong. Along the Yangtze there were holdings at Chinkiang, Wuhu, Kiukiang, Hankow, and Ichang. In addition, the company operated as far south as the Vietnamese ports of Haiphong and Hue. All this shore-based property was valued at 1.6 million taels. The steamers had a value of 2.3 million taels. Among the company’s liabilities, as Morse totaled them up in 1886, were twenty thousand shares of capital worth 2 million taels, government debts of some 1.2 million taels, indebtedness to foreigners of 0.5 million taels, and some smaller items.24

After discharging his preliminary responsibilities in March 1886, Morse stayed on with the CMSN Company at Li Hung-chang’s request, “temporarily attached to the Company for the purpose of assisting the
Directors in the conduct of their relations with foreigners, both their own foreign employees and foreign houses with which the Company is brought into contact.” This service was important not only because the CMSN Company had to rely on foreign captains and engineers to keep its ships in operation, but also because it depended on loans from the Chinese government and the Hong Kong–Shanghai Bank for its financial well-being. Moreover, rate wars and rate agreements with competitors such as Jardine Matheson and Butterfield and Swire required a steady diplomatic style of close contact and careful negotiation.25

Morse felt that his new responsibilities extended well beyond serving as a middleman for the company in its negotiations with foreign employees and institutions. In his view, Li Hung-chang had given him explicit oral instructions to seek and effect reform in the company’s administration. He came as a new broom, sent by the governor-general himself.

Unfortunately, Morse arrived at a bad time in the company’s history. Sheng Hsüan-huai now headed the CMSN Company, and as Li had feared, he began to replace merchants with bureaucrats. Sheng also used a check and balance policy among his staff that created bad feeling among them and led to internal conflicts. Making matters worse, Sheng remained in North China, generally at Chefoo, where he looked after other projects. When he came to Shanghai he was usually “surrounded by people,” so that Morse could seldom get to him. The remoteness of the person with the deciding voice proved to be a great hindrance in administration because it involved delay, misunderstanding, and burdensome communications.26

In 1886, as Morse was expanding his advising and promotional work for the China Merchants’ Company, the chief executive officer at Shanghai was Ma Chien-chung (who signed himself in communications to Morse as Ma Kietchong and is referred to elsewhere as Ma Kieh-chung). He was the younger brother of the famous Catholic leader Ma Hsiang-p’o (S.P. Ma) and already had a considerable career behind him. First he had been sent by Li Hung-chang to Paris to assist the Chinese Legation there; in the French capital he had studied political science and government and passed his examinations with distinction. He was then sent by Li to Korea, where he assisted in pressing forward the Chinese policy of the early 1880s. In 1882 Li sent him on a private mission to India with proposals concerning the arrangement of opium shipments and control of the trade.27

Morse considered Ma Chien-chung to be a man of “good will and good intentions,” with whom he “worked very well.” He found Ma to be not only congenial and supportive but also “thoroughly loyal,” although Ma
and Sheng Hsüan-huai did not get along well. Morse also held a high opinion of the head accountant, Yen, whom he described as “a man of great ability and considerable influence.” Morse clearly believed that he enjoyed their confidence and support. He told Detring on May 8, 1886: “I think even those in the Shipping Office recognize that I always work for the company even when I am opposing their views. I have no reason to complain of my position and I am pretty well backed up by Ma.” Morse felt, however, that Ma Chien-chung was rather weak and too much inclined to “allow things to drift.” His well-connected brother, Hsiang-p’o, was, in Morse’s opinion, “a stronger man.”

In a sense Morse and Hsiang-p’o were kindred spirits. Both had innovative ideas, and both confronted powerful vested interests. One of Hsiang-p’o’s schemes was to start a line of light draft steamers for use in opening up the Pearl River above Canton. Morse reported to Commissioner Hippisley in June 1885 that Hsiang-p’o had arranged for financing from his “monied friends” at the port and that he had “brought the scheme before the Governor-General [of Liang-Kwang].” But the latter was afraid of losing revenue from likin, a Chinese tax on domestic trade, so no action was taken. At about the same time, Morse described Hsiang-p’o’s foresighted plans for developing the northern part of Taiwan, remarking prophetically: “I should like to work at Formosa myself as I believe Liu [Governor Liu Ming-ch’uan, one of Li Hung-chang’s protégés] will go ahead. . . . I have great trust in the future of Formosa.” Little did he know what was actually in store for him.

In the same spirit of creative innovation, but with far less at stake, Morse tried to effect a more efficient consolidation of the CMSN Company’s waterfront holdings at Hankow. At the time, “the frontages ran as follows: China Merchants, 507 ft. (2 steamers); Customs, 100 ft; China Merchants, 212 ft. (1 steamer); Butterfield & Swire, 300 ft. (1 steamer); China Merchants, 293 ft. (1 steamer); B. & S., 90 ft.” Instead of this division Morse proposed the following consolidation: “China Merchants, 507 ft.; Customs, 100 ft.; China Merchants, 612 ft. (2½ steamers); B. & S., 350 ft. (1½ steamers).” As he explained matters to Sheng on June 9, 1886: “We surrender one large dwelling house and two large godowns, and we obtain one large dwelling house (but not so large) and three large godowns (better built than ours).” Morse went on to say, “I understood before you left . . . that the two directors were agreed as to the benefit to the company from the exchange. Otherwise I should not have thought it well to move until the two were agreed. I now think it would be well to have your opinion on the
proposed exchange with the Customs at Hankow. I enclose a copy of the memo I gave to the I.G. Typically, this proposal for a more rational use of waterfront property was a bright idea that ran up against vested interests and bureaucratic indecisiveness. Nothing came of it.

Morse also tried to get the Shanghai wharf properties into shape. He found, for example, that the big Kin-li-yuan wharf and warehouse could not hold more tribute rice because the rice already deposited there had not been stacked as was customary. Undoubtedly the lax management was gaining personally from its laxity. He also argued that it was “essential to make up for the waste of money in former years,” such as the construction of a three-story godown in which the third story could not be used efficiently. His arguments, however, fell on deaf ears.

Yet another proposal of Morse’s was to introduce refrigeration as a means of preserving stored meats and other perishable products. On May 24 he wrote to a Mr. Veitch:

I have long had an idea which I should like to see carried out, and which would be admirably adapted for large establishments in hot climates. You know that meat is ‘refrigerated’ from U.S. to England by compressed air suddenly expanding and then let into a refrigerating chamber. By utilizing this idea I would do away with the necessity of punkahs [ceiling fans]. I would have an engine of size sufficient to work an air compressing machine and force the air into an air-tight chamber for which any small room in the basement would do.

Morse went on to describe how refrigerating chamber air could be brought from the basement through pipes or wooden channels. His plans had to be abandoned, however, because the Chinese felt (or at least claimed) that the energy system would too easily become overworked.

Morse’s most grandiose plan, upon which he spent large amounts of his time, involved opening the Upper Yangtze to steam navigation. To a Chinese employee it seemed most appropriate that this last step in the steamship’s penetration of the trade of China should be taken by a Chinese company. Morse asked the I.G. whether he favored the opening of Chungking to steam navigation. “The directors of the CM Co.,” he wrote on May 27, 1886, “have the intention either of themselves opening or of backing someone else in opening; it is only an intention and they have not communicated it to the higher authorities nor asked permission but await advice as to its feasibility.” Evidently Hart had no objection. Morse,
therefore, asked Messrs. Yarrow and Company in London whether they could build “a steamer to mount strong rapids, similar to those provided by you for the Nile; to steam at least 16 knots on trial trip; length not over 170 feet, to take 200 tons dead weight cargo, 150 deck and 25 cabin passengers and 5 days coal; draft with full cargo and coal 3 feet.”

Morse told Yarrow and Company that the steamer should accommodate “a captain, two mates, three engineers, four quartermasters, ten sailors, firemen and five on Chinese purser staff.” He asked that Yarrow send an able man to go with him up the Yangtze in a small boat. He also approached the French firm of Schneider to get estimates, since that company had provided steamers for the Red River in Tongking. Morse then wrote to F.S.A. Bourne, the British consul at Chungking, for advice on the inauguration of steamer traffic. “The line will be opened under the foreign flag (British, if we can find a British capitalist) and the CMSN Company will assist in the way of providing for the through freight,” he explained.

Morse proposed to make a prospecting trip up through the Yangtze Gorges himself, possibly in September 1886. On June 15 he wrote Robert Bredon, “We are going to open the Chungking route if as the result of my trip it is reported feasible. . . . If I can get it opened I think I should have done a good piece of work.”

When Ma Chien-chung went to Tientsin to secure Sheng’s approval of the opening of the Upper Yangtze, Morse provided him with detailed data on the trade coming out of Szechuan and its taxation, as well as the import trade. These data showed that a considerable profit would be possible for the China Merchants’ Company. To Detring in July 1886 Morse reported that “Sheng has taken charge of putting the Chungking line through and getting the permission of the Viceroy and of government.” On August 3, in a burst of unwarranted optimism, Morse told Detring: “I have a good deal of influence and my position seems to me stronger than it was six months ago.”

What Morse failed to understand was that the investment strategy of the company had become more conservative. Both Li Hung-chang and Sheng Hsüan-huai were now solidly against any further expenditures for new ships, which the proposed Chungking route would naturally require. Li may have wanted to open the route in principle, but the CMSN Company was currently under obligation to repay its Hong Kong–Shanghai Bank loan—not to mention fourteen government loans—as soon as possible. Instead of expanding the steamship company in the interest of financial growth, Li sought to build up the Chinese navy vis-à-vis Japan.

There was another difficulty in the Chungking situation. Whether
Li Hung-chang at Tientsin could make basic decisions about opening Szechuan province on the other side of the empire is doubtful. A principle of territorial-bureaucratic balance inhered in the imperial administrative structure, and this may have accounted for the proposal that a British or other foreign firm lead the way on the Upper Yangtze, with Li's China Merchants' Company trailing along behind. As it developed, a British entrepreneur from Shanghai by the name of A.J. Little would open the Upper Yangtze in 1896.

Not wanting to be overly direct with Morse, Li and Sheng tried to indicate their unwillingness to proceed without actually saying so—a feature of Chinese bureaucratic practice that foreign business people in China still decry. Morse misread the signals. On August 31 he wrote to Detring: "As the Viceroy does not permit us to open the Chungking line yet I've decided I cannot spare the time to go there myself but as ultimately we must do it Ma agrees to allow the expedition to go to report."44

By mid-October, however, Sheng had become more intransigent, and Ma had changed his tune. Sheng now claimed that he had "never approved [the project] and had always thought it impossible," while Ma told Morse point-blank that he would "not assume the responsibility of letting [the Chungking expedition] go"—even though arrangements for it had already been made. Morse apparently believed that Li still supported the plan but that his subordinates lacked the necessary foresight, courage, and conviction. On October 19 he wrote in obvious disappointment to Detring: "For the future the Company is going to drift; no plan for the future is formed, no steps laid down in advance, and no one dares assume responsibility for the smallest thing. When I say that a certain step may show loss in the present, though not certainly, but will be greatly to the Company’s advantage in the future, I find that no one will assume responsibility for anything except the immediate present; drifting is the sole policy and the future may care for itself."45 Detring, for his part, apparently left Hart in the dark about the situation; the I.G.'s journal entry of January 6, 1887, notes a long gap in Detring's correspondence, which Hart considered "quite odd."46

Morse's Recall

It is readily apparent that Morse operated in a complicated bureaucratic world that no outsider could possibly hope to understand. Yet he tried mightily to make sense of it all. From Morse's perspective, the CMSN Company consisted of three main groups, each with different responsibili-
ties and priorities: first, “The Shipping Department, (including shipping agents and captains),” which “always calls for increased efficiency regardless of cost”; second, “The body of shareholders,” who “call always for diminishing expenditure regardless of efficiency”; and third, “The Directorate, (including Directors, Accountant and [foreign] Marine Supt:), whose duty . . . [is] to weigh carefully and with foresight the two conflicting claims and by deliberation to secure the maximum efficiency at the minimum of cost.”47 The directors, who had come to hold the initiative, were becoming mainly bureaucrats who wanted personal profits. Unlike the ever-diminishing group of merchant managers, most did not invest in the company in order to join it.

Working in the managing director’s office, Morse was involved in administrative decisions and actions, but this involvement was complicated by the built-in ambiguity of his status as a foreigner in the Customs Service: he was a paid employee of China, yet, as a foreigner, he was protected by extraterritoriality. He could not be summarily seized and disciplined by the Ch’ing dynasty’s administrative laws and regulations, except through the agency of his employer, the I.G. He was in place because China had been invaded and defeated by the aggressive Western powers, yet his assignment was to help China build up its industrial strength. Inevitably he developed a sense of righteousness that he could not conceal. “All who have wished to secure benefits against the rules, have had to rage,” he once asserted. “I have invariably said the rules must be altered, not broken.”48 Like all of Hart’s men, Morse had a guaranteed and considerable salary and was therefore impervious to corruption; yet he worked within a cultural environment that encouraged the very bureaucratic practices he most despised. On this borderline between old Chinese and new Western ways and values, conflict was inevitable. Whenever Morse sought idealistically to increase efficiency or to save money, he threatened vested interests and made enemies. Once, for example, when he discovered that the ships’ compradors were padding their passage money beyond the limit “fixed by express regulation,” he unhesitatingly charged the excess amount to their staff. This decisive move, which naturally alienated the entire lot of them, might not have been a problem if the compradors had been powerless; but Morse later discovered that “[t]heir voice was always listened to in the shipping office.”49 Morse’s correspondence with Detring in the fall of 1886 shows the way his career with the China Merchants’ Company rapidly collapsed. On October 19 he wrote a long letter reporting his recent problems with Sheng
Hsüan-huai, whom he accused of failing to honor commitments and of telling “several lies.” He also complained of the new assistant director of the CMSN Company, Shen Neng-hu, whose inexperience and ill-advised policies Morse felt certain would “shipwreck the coach.” In particular, he denounced Shen for flooding the firm with paperwork by insisting that everything be translated into Chinese and for flagrant mismanagement—such as ordering that “all bills paid shall henceforth be subject to five percent discount.” This, in Morse’s view, would be “fatal” for business.

Morse also condemned Shen for launching an unwarranted attack on the marine superintendent, Captain Roberts, and demanded that Shen be fired. Although Morse later admitted to Detring that Roberts’s manners were indeed rather “brusque” and that his letters to his Chinese superiors had a certain “objectionable” character and content (which Morse somehow ascribed to the influence of Russell and Company), he nonetheless believed that Roberts was one of the “best men available.” According to Morse, the rough but efficient marine superintendent had managed to save the CMSN Company large amounts of money by virtue of his innovative methods, his technical skills, and his close attention to detail. By working nights and “needing less staff,” Morse asserted, Roberts had saved “tis. 50,000 every year.”

Another source of frustration for Morse was Sheng’s intimation that he and Roberts might have been taking illegal “commissions.” Morse, working for three hundred taels per month, without any Customs pay, had requested a raise of one hundred taels per month, but he refused either to take a percentage of business or to have a share in the director’s bonus. As he told Sheng in Chefoo, he “preferred the lesser amount in increased pay,” as he “wished to work as an official, receiving not one cash outside a fixed salary.” This, he maintained, would make him “more insistent to get the [pay] increase or return to the Customs.” Sheng found his attitude unfathomable.

On November 3, 1886, Morse wrote a letter to Detring complaining about Sheng’s continual absences from Shanghai and Shen’s inexperience and ineptitude. The next day he told Hart that he had written to Li Hung-chang expressing these same views, and he indicated that “if Shen remains with the company, I shall probably have to resign my connection with it.” Morse believed that Shen was fundamentally “honest and well-meaning” but that he was “too inexperienced, obstinate and pig-headed to do anything but harm to the company.” When Shen issued a direct reprimand of the foreign marine superintendent and chief engineer on
November 11 and then deliberately circulated it to all their subordinates, thus causing them to lose face, it seemed like the last straw. 57

On December 1 Morse wrote a letter of resignation to Li Hung-chang, reiterating his complaints about the management of the CMSN Company and pointing to three important conditions required for the proper running of the company: the maintenance of friendly relations with other steamer companies, the strict guarding of cash reserves, and the retention of a well-qualified and thoroughly competent marine superintendent. Morse hoped his resignation would take effect from March 1, 1887. He sent this letter in English for Detring to read to Li Hung-chang, since Morse did not want to render it in Chinese and have it spread abroad. He also wrote to Sheng and to Hart. 58 However, he held up his resignation temporarily because Shen seemed to have become more conciliatory. 59

In early January 1887 Li Hung-chang ordered a Chinese, Chun Fei-ting, to act jointly with Roberts as marine superintendent. Morse wrote in disgust: "A better way of getting nothing done I do not know. If the arrangement goes on, there will be trouble and we shall get back to where the old company was." Morse foresaw that this arrangement would open the door to the corruption that was rife earlier, when the foreign joint superintendent avoided responsibility and went along with a situation in which captains and others falsely inventoried stores and no one checked the accounts. "We have at last discovered the way of doing nothing while spending as much money (lucky if not more) as if we did something," he fumed. 60

This crisis produced a catharsis, as is common in the group dynamics of such struggles. By January 20 Ma Chien-chung had returned from seeing Sheng at Chefoo and reported satisfaction on all counts. As a result, Shen Neng-hu was, in Morse's words, "literally silenced," and his new plans were "set aside in favor of business as usual." 61 Morse later explained to Hart: "I took my stand on the principles of management which had for a year past controlled the Company and all the things of which I did not approve to be done by others, protesting and refusing to do them myself." According to Morse's retrospective account of the affair, he had only been "waiting [for] the spring navigation to open" in order to resign, when an abrupt "change of policy" took place. Morse ascribed this drastic change to his letter of December 1, 1886, in which he had threatened to leave the company. 62

By May 1887 Morse could assure Detring that "matters are working now without a hitch." 63 Not only were Shen's plans set aside, but Morse
also received a salary increase to four hundred taels per month from August 1, 1887, with arrears to be paid. Despite these new developments, however, Morse continued to have “difficulty in doing business with Shen.” As he complained to Detring on August 2:

The day after Ma left I took in a letter for him [Shen] to sign in continuation of one written the day before signed by Ma. He said it was Ma’s concern and refused to sign. I spent half an hour explaining that it was CM Co. business, that it was only a sequence of the preceding letter and that the company would lose if it was not signed. He persisted and would not even go into the question and did not sign. I . . . [kept] it for Ma’s return and this delay of six weeks cost the company I estimate tls. 500. This occurred with two or three more letters until I found that I was wasting time trying and was prevented doing my proper work. So when more letters came in I put them on file for Ma’s return. In case of urgent letters I either saw the writers or wrote private notes making temporary arrangements and explaining exactly why the delay arose.

Morse found that Ma could sign something in five minutes when it was explained. But Shen would always be surrounded by half a dozen men, of and not of the company, and Morse would be kept half an hour to no account. So, as Morse explained to Detring, “[I] soon got in the way of omitting to consult with Shen when I was busy and only going when I had plenty of time before me and this not with deliberate intent but in simple self-defense. Sometimes I would put off the question until I had more time. Sometimes (only if it were a routine matter) I settled it.” This noncooperation laid the powder train that eventually blew Morse out of his post.

In brief, a captain suddenly became ill and had to be replaced by another (equally competent) captain. In order to get action, Morse gave the authorization for the replacement, although he was supposed to go through the assistant director, Shen. It happened that the captain so transferred without Shen’s authority wrecked his ship, the Pantah, and Morse was therefore “responsible.” According to Chinese theory and practice, his responsibility was absolute, and there could be no mitigating circumstances. Morse resigned on August 2. His “resignation” was immediately accepted and announced. Morse wrote to Sheng at Chefoo on August 3, “I would advise you not to make public my reason for resigning, as it would make the company a laughing stock in the opinion of all the foreigners, who cannot understand such responsibility.”
Mr. P.E. Cameron of the Hong Kong–Shanghai Bank protested Morse’s “resignation” to Viceroy Li because his presence was regarded as a security for the bank. But Cameron was not the only one who wanted Morse to remain with the CMSN Company. Even Shen reportedly did not wish to see him leave the company, perhaps realizing that as a result of his removal the Cantonese would, in Morse’s words, “become the mouth of the company . . . as they alone are clever enough of those in the C.M. Co. and know enough English.” Meanwhile, some of the behind-the-scenes melodrama came to light when one foreign and two Chinese friends who were connected with the China Merchants’ wharves in Shanghai asked Morse to call on the elder of the Ku family, brother of Ku Mei-foo, the comprador of the CMSN Company’s Hongkew wharves. This elder said that if Morse wished to stay with the company, he need only say yes and the word would be passed to Shen. Shen would then petition for Morse’s reinstatement. Morse mulled the matter over for a bit but ultimately decided against intrigue.

Upon learning of Morse’s dismissal, Hart expressed dismay that the Chinese had an excuse to say that they had fired him because he broke the rules. In fact, this was precisely what Li Hung-chang’s dispatch to Morse averred. But Morse himself claimed to have few misgivings. As he told Detring on August 8:

I do not regret my recall. I consider that I have done good work for the company and I consider further that few others could have filled my directions. . . . many could make better administrators than I, many could have had broader ideas, but I do not think that many would have been willing to efface themselves in the company as I have or to withhold as I have the appearance of power while exercising the reality. . . . I regret having to leave off my work of the past two years; but I do not regret leaving the post where all around me are spies on my actions and where charges are made to which I am given no chance of replying before the decision is given.

The more Morse thought about his situation, the more unavoidable his fate seemed to be. On August 25 he wrote to a Customs friend, William Cartwright:

Every month has made it more inevitable that sooner or later I should go. Reforms always touch the pocket of someone; and many ‘someones’ with their friends make up a crowd. My position might have
been very easy, had I been content to draw my pay and execute orders; but the Viceroy’s instructions given me at the outset forbade that, and I set to work to do what little I could in the way of reform. Every step alienated someone whose pocket was touched, and went to swell the volume of hostile criticism. . . . [But] I have comfort in thinking that I have done my duty and am thankful to be quit of the whole concern.73

Morse’s final letter to Detring on August 26 stated:

Now that the worry is over I am heartily glad to be out of the company. My going sooner or later was inevitable as I regard matters now; it would not be were a European in the Viceroy’s place but with a Chinese ready to hear reports from everyone it was sure to come. I came here instructed personally by the Viceroy to carry out reform on certain lines and I have done so. Every reform, if it benefitted the company, did so at the expense of the pocket of someone, being aggrieved, his voice would go to swell the cry of general hostile criticism and as the volume of this became greater I would be sure to go down, probably on a charge which I could not answer openly.74

Hart’s report to Campbell in London was succinct:

Morse, after doing splendid work for the C.M. Co. during the last two years, put the Capt. of the “Meifoo” into the “Paotah” [and during] the voyage she was lost and [he] did so without consulting the Directors: there was no time to consult and if consulted they would have approved. Paotah was lost in a fog: Directors denounce Morse: Morse resigns: Li accepts resignation, but says that Morse confesses his fault—i.e. owns he caused the loss!—and that he is cheaply let off. (I suppose he’d like his head!) so Morse—a very capital man—comes back to us. This is fortunate for Daae is going home and I am weak.75

Forty-four years later, writing biographical notes for Harley Farnsworth MacNair in 1931, Morse summarized his China Merchants’ experience, including his “enthusiastic plans” for the opening of the Yangtze to Chungking by a Chinese company; his persistent “efforts to achieve efficiency” in the CMSN Company (which resulted in savings of some thirty-five thousand dollars “by his own efforts directly and much more indirectly”); and his attempt to keep “in touch with international events between China and Japan,” reporting back to both Detring and Hart. In all
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these things he intended to make the Chinese see that he was “honest and reliable and worth retaining in their service” and that he had “steered a course without regard for his own advancement and profit among people doing the opposite.”

Looking back on Morse’s reform efforts and eventual ouster from the CMSN Company, one result seems especially significant: he lost his contact with Li Hung-chang’s North China clique of officials. Morse’s first posting to Tientsin and his famine relief experience with Sheng Hsüan-huai had brought him into Li Hung-chang’s entourage, where Commissioner Detring was the chief foreign star. In London Morse helped to develop Li’s navy. He had further contact with Li and Detring during his second tour in Tientsin, which led to his appointment to exchange prisoners with the French and to the bestowal of imperial honors. Morse’s service with the China Merchants’ Company gave promise of advancing his career as a potential member of Li’s mu-fu, or stable of special assistants skilled in modernization, diplomacy, and the like.

Yet in the end Li found Morse a troublemaker, incorruptible and dead serious about reform. His Western righteousness did not fit into Li’s pattern of public service cum corruption. Perhaps Morse would have fared better if he had been able to operate with greater patience and more tolerance for the culture in which he was working, but that did not suit his style of efficiency. In this respect, Morse was too un-Chinese. Detring apparently played his hand more adroitly, as if knowing intuitively that in almost any situation Li would support a Chinese against a foreigner. In addition, according to Hart, Detring “worshipped” Li.

When a chance opened to get Morse out, Li stooped to the traditional Chinese device of using ritual responsibility as a sacrosanct principle: he alleged a fault in procedure that broke explicit rules. Li’s order accepting Morse’s resignation put the blame entirely on him in pro forma fashion and said little of his service to the company. It was an irreparable break, given the basic difference in Chinese and Western legal ideas as well as codes of conduct. After 1887 Morse’s Customs career was to be entirely in South China or on the Yangtze, far from Li Hung-chang’s bailiwick. This limitation was to have serious consequences for Morse’s health. Health problems in turn eventually curtailed his career in the Customs Service.
6

Shanghai and Pakhoi

1887–1892

Having done what he could in the tangled affairs of the China Merchants’ Steam Navigation Company, Morse returned to Customs duty as acting assistant secretary in the inspectorate general at Peking for six weeks. This was evidently an appointment that could keep him on salary while he awaited a more substantial assignment, but it also allowed the inspector-general to profit from Morse’s personal report on life as an adviser to a Chinese shipping firm. Morse, for his part, was able to observe the I.G. in action, at full tilt, as always. In 1932 Morse recalled: “In 1887 I was for two months living in Sir Robert Hart’s house and (though the Service was then much smaller) I saw how strictly he apportioned every minute of his day.”

Customs Work at Shanghai

After that brief but illuminating respite, Morse returned to Shanghai to serve as deputy commissioner for bonding. In the late 1880s Shanghai was already one of the hubs of world commerce, yet the city remained remarkably lacking in the material tokens of modernity. Rickshas had supplanted palanquins, and major streets were lit with gas; but only in 1883 did piped water start flowing to a limited number of outlets. Electric lights began to supplant gas in the 1880s. The Bund and its several parks were being created from marsh lands. The railway, however, did not run to Nanking until 1908, just at the time that Morse left China for good.

The foreign community at Shanghai remained predominantly Anglo-American in the International Settlement and pertinaciously French in the French Concession. Churches and missionaries flourished, including the Jesuit establishment and observatory at Zikawei. The Amateur Dramatic
Shanghai and Pakhoi

Club still supplied Western-style theater, and adventuresome foreigners always had opportunities to explore the Chinese city and its environs. In early 1887 Nan Morse herself organized an "expedition" with Mrs. Drew and others to visit the Lung-hua Pagoda. We can be certain, however, that she and her friends did not mingle with the locals or stay very long. As always, Chinese life and culture remained a separate world.

Morse’s first assignment at Shanghai was to establish new Customs bonding procedures. He had begun to work on the "bonded godown question" while still in the service of the CMSN Company but "had to drop it" in the midst of his battle with Sheng Hsüan-huai and Shen Neng-hu. According to Western practice, goods imported in bond could be held in storage before being released upon payment of duty; or, if going further, they could be shipped out again without any duty payment. This was a privilege already enjoyed in most of the rest of the world and long sought by Western merchants in the Chinese treaty ports. But in China, bonding had never worked out.

Part of the difficulty lay in the complex structure of taxes and duties. Import duty and transit passes were paid to Customs. After expenses had been subtracted, funds were forwarded to the central government in Peking. Likin, however, was a provincial tax that was collected at stations on trade routes and designated for local officials. Naturally, these officials did not want to see likin payments circumvented by having goods travel under Customs transit passes. The Chinese Customs superintendents, for their part, had vested interests in maintaining their job of receiving the duties paid by foreign merchants to the Customs bank at each port. They wanted assurances that goods once imported would sooner or later be liable for regular duties. Hart’s establishment of a bonding system in 1887 consequently required diplomatic as well as procedural skills. It fell to Morse to work out arrangements that would, among other things, meet the concerns of the Chinese superintendents of customs.

Morse had made a special study of British and Western European bonding while in the London office and had carried on his research in New York while on leave during the winter of 1882–83. With that training and his China Merchants’ Company experience, he was in a good position to understand the problems involved in bonding in China. Hart had visited Shanghai as early as 1882 to canvass the possibilities, and in October 1887 he promoted Morse (whose Customs rank was then second assistant A) to be deputy commissioner for bonding in the Shanghai office. According to the I.G., "[Morse’s] acquaintance with the China Merchants Company’s
wharves, godowns, vessels and business point to him specially as the fittest person for this post.”

Morse was to report for duty before mid-November. With his “energy and intelligence” (as Hart put it), he would arrange for bonding procedures to commence on January 1, 1888. The new Bonding Desk in the expansive Shanghai Customshouse would, in turn, maintain contact with “various other desks—Import, Export, Duty Memo, Clearance, etc.” It would also deal with “the opium work.” Hart indicated that Morse should have an assistant at the Bonding Desk so as to “be free to visit opium hulks, opium godowns and bonded warehouses whenever necessary.”

The British and Chinese governments had agreed to the Additional Article on Opium on July 18, 1885. It was “additional” to the Chefoo Convention of 1876, the third Anglo-Chinese treaty settlement (after 1842–43 and 1858–60) that completed the main structure of imperialist privilege in China. Now in 1885, a capstone had been put on the impairment of Chinese sovereignty. Under this Additional Article, imported foreign opium was to be stored in bonded warehouses or receiving hulks under Customs control at the port of entry. It could be released only after payment of thirty taels per chest as Customs tariff duty and not over eighty taels as likin, paid to Chinese provincial officials. Only then could it pass through the interior under a Customs transit certificate free of further taxation. In the short term this was a gain for China’s central government (via the Customs), which thus replaced, at least with respect to opium, the inland likin fees that had formerly been under dispute with local authorities.

All this was easily said, but Morse had to devise complex procedures to take account of multiple alternatives. General cargo goods released from bond were subject to duty if they were for sale at Shanghai or the Yangtze ports, but no duty was paid if they were exported to other ports under exemption or drawback certificates issued to foreign vessels permitted to carry both foreign and Chinese goods. Morse devised twelve different forms (to be printed in red for identification), and applicants took the steps appropriate to their needs by going from one desk to another within the customshouse. This system exemplified the division of customs procedure among different component desks, where each customer could pursue his own mixture for his own requirements.

If properly carried out, the procedures would have been foolproof, but of course Shanghai was still Shanghai. Contrary to the Customs Service’s intention and desire, bonding at once became monopolized at the China Merchants’ Company’s warehouses. In the absence of competition to keep
charges low, the company then raised its prices. As a result of the increased cost and the complexity of the bonding procedure, it was little used by merchants. Thus, during an initial six-month trial period, only 30 of 416 vessels entitled to bond their cargoes took advantage of the privilege; and of the 300,000 packages discharged by these 30 vessels, only about 3 percent were bonded. So matters stood for the next ten years. Out of some eight hundred categories of import goods, only about forty-five appeared in the quarterly and yearly bonding tables published by the Customs Service. Bonding was supposed to preclude payment of duty for goods in storage or in transit, but since low import duties prevailed and goods passed quickly from consignee to dealer, there was little incentive for merchants to take the time and effort that bonding required. 10

In short, under Chinese conditions, bonding as a general practice failed. 11 On the other hand, bonding for opium imports under the Additional Article proceeded smoothly, the parties involved, like Jardine, being on the whole respectable and responsible. After a maximum import in 1879, however, foreign opium began to give ground to China's domestic production. The figures are striking. In 1888 Indian and Persian opium imported into China totaled 82,612 piculs (one picul equals about 133 pounds); by 1897 the total was less than 50,000 piculs. Although foreign importers blamed the decline on the high likin tax allowed by the Additional Article, the fundamental cause was clearly the increased production and growing popularity of cheaper native opium. 12

After discharging his responsibilities as deputy commissioner for bonding, Morse entered another realm of administrative complexity when he became assistant statistical secretary at Shanghai in 1888. This rapidly growing branch of the Customs Service, where Morse would eventually end his career as the head of operations, combined the functions of an archive, a research institute, a government printing office, and a publishing house. 13 Although we do not know precisely what Morse did during his several months as assistant statistical secretary, a preliminary look at the functions of his department may suggest the broad range of his administrative concerns.

The Statistical Department's flow of publications, organized into seven main categories, including six series, was formidable in size and diversity. The first series was called Statistical, and consisted of Returns of Trade or Trade Reports issued daily, quarterly, annually, and decennially. In the end there were five issues of Decennial Reports (for the years 1882–91, 1892–1901, 1902–11, 1912–21, and 1922–31). These symposia summa-
rized "the trade, industries etc. of the ports open to foreign commerce" and "the condition and development of the treaty port provinces." This vast, continuous flow of commercial data discharged a main duty of the Customs Service—to tell the world about China's foreign trade.\(^\text{14}\)

Ambiguity if not downright obfuscation set in with the names of the other five series, called successively Special, Miscellaneous, Service, Office, and Inspectorate. There was also another category of nonseries items—that is, publications not included in any series at all. Taken together from 1864 to 1910, these series and nonseries items totaled about two hundred volumes. In part these documents were instructions, such as the accumulated inspector-general's circulars sent to all Customs offices (ten volumes in the Service Series). Some were reports on the operation of various parts of the Customs Service, such as lights, buoys, and beacons (thirty-two items in the Office Series). One category of volumes dealt with specific commodities such as opium, tea, silk, medicines, jute, and soya beans, all in the Special Series along with "Notices to Mariners" and "Medical Reports," plus items on certain geographic features of China: the Woosung Bar, Chungking, the Upper Yangtze, the West River, and the Yellow River. The Miscellaneous Series included catalogues of Chinese exhibits at a dozen international expositions where Hart made a special point of having China represented. It also contained lists of medicines, lighthouses, place-names, treaties, post offices, and so forth.

One can only conclude that no one planned it that way. The Customs publications simply accumulated as one topic after another was raised by curious administrators and reported on by competent officers. In time, however, these publications became a seedbed for Chinese studies. For example, in the years 1888–89, before Morse went on to another assignment, the Statistical Department published in the Special Series (vols. 8–14) a study on medicines exported from the Yangtze ports together with various works on opium, tea, and silk. In the Office Series were volumes 26 to 29, comprising Lights: Reports for 1887, Lights: Reports for 1888, and two volumes entitled Smuggling at Canton. By working on projects of this sort Morse shifted his Customs role from active administrator to scholar and editor for a few months in 1888–89.\(^\text{15}\) The publications he helped to produce were intended for the public and for Customs staff, as well as for overseers and archives. This multifaceted flow of often invaluable information, reflecting Hart's imagination and the ingenuity of his commissioners, is now part of China's national heritage.
Shanghai's Learned Societies

At Shanghai Morse continued to pursue the scholarly interests he had begun to display in London during 1880–82. His first step in 1888 was to join the North China Branch of the Royal Asiatic Society (NCBRAS). The founder of the NCBRAS journal, Elijah Coleman Bridgman, had established the Chinese Repository as a monthly publication at Canton and Macao and had published it from 1832 to 1851. Boasting a wide range of articles in addition to its “Journal of Occurrences,” the Repository played a role that became steadily more important in China’s foreign community with the passage of time. In 1858 at Shanghai, Bridgman produced the first volume of the Shanghai Literary and Scientific Society Journal. A year later the title became Journal of the North China Branch of the Royal Asiatic Society.

By Morse’s time, the NCBRAS was on Museum Road behind the British Post Office. It boasted an “exceedingly comfortable lecture hall” and a museum that housed, among other things, a large collection of the birds of China.16 Its greatest asset, however, was its library on Oriental subjects, containing materials that included the proceedings of learned societies and a number of maps. In 1872 the society’s honorary librarian, Henri Cordier, published a catalogue of 826 Western-language entries representing the library’s 1,300 volumes, among them 718 volumes and pamphlets given by the indefatigable missionary collector Alexander Wylie. In addition, the library held 1,023 Chinese-language volumes, the research data and reports of various learned societies, and a number of periodicals. For Shanghai, the collection was nothing short of amazing. Complementing a great body of European works published before 1800 were comprehensive holdings from the nineteenth century. Cordier’s monumental Bibliotheca Sinica attests to his preeminence in his field.17 The NCBRAS library would be a basic resource for H.B. Morse when he turned historian.

Throughout the society’s history, its journal reflected an ecumenical outlook. The early contributors were mainly missionaries, notably Dr. Daniel J. Macgowan and the Reverend Joseph Edkins. Samuel Wells Williams, one-time secretary of the American Legation, sent to Japan under Commodore Perry in 1854, discussed Japan. Naval captains contributed items on meteorology and sailing directions. Publication ceased after the fourth issue in September 1860 because of Bridgman’s death in 1861, but was resumed with a new series in December 1864. Under the leadership of Thomas W. Kingsmill, who became NCBRAS president in 1876, the journal presented more and more reports on the geography, resources, and current
customs of China and Japan. The society’s monthly lectures, which formed
the basis for most NCBRAS articles, provided a convenient occasion for
sinologists to meet.

In 1892 the NCBRAS had approximately 250 members, of whom
more than one-fourth came from the Customs Service. This element out-
numbered the cohorts of officials of foreign governments, of merchants, and
of the more scholarly missionaries. E.B. Drew served as president of the
NCBRAS from 1882 to 1887, and we may be certain that he facilitated
Morse’s welcome into the society. As the first Customs employee from
Harvard, Drew found that his prestigious education paid off. He served in
the senior Customs Service posts of statistical secretary from 1882 to 1887
and chief secretary in the inspectorate general in 1889, and on several
occasions he was also the collector and curator of Chinese government
exhibits at international expositions. Hart held him in especially high
esteem. Having entered the Customs Service close to its beginning, Drew
had risen swiftly to commissioner level during the Customs’ golden age. He
published many volumes while statistical secretary and was a leader in the
foreign community of the treaty ports. His initiation of Hosea into academic
studies in Shanghai in the 1880s was typical of his imaginative support, and
he continued to provide wise counsel to Morse, Merrill, Clarke, and Spinney
until his death in 1924.

When Morse joined the NCBRAS in 1888, he became at once a live
wire, bringing new energy into its operations. That year the NCBRAS, with
Morse’s strong support, promoted the establishment of a Museum of Trade
and Commerce. As honorary secretary of the council of the society, Morse
pointed out in a letter to the North China Daily News of October 15, 1888,
that the promotion of commerce worldwide required special organizational
efforts, including the formation of societies of commercial geography. No
fewer than thirty-nine of these societies had been formed in nine countries,
and as Morse put it, “a steady stream of commercial knowledge is now
poured upon the world.”

Likewise, commercial museums were increasingly necessary as
practical tools of information for the trader. Morse noted, for example:
“There are now no less than seventy-three such institutions organized in
eleven countries of Europe; Germany alone having twenty-eight and France
eighteen.” Obviously, he argued, the trading community in China should
develop its own commercial museum. This place, Morse wrote, would
presumably “contain agricultural products in all stages of preparation;
farming implements; specimens of minerals from all the Eighteen Prov-
inces; models of metallurgical apparatus; examples of the thousands of substances used by the Chinese as medicines; vegetable fibres and products; textile fabrics; tools and utensils; porcelain, metal and other wares; and numerous other products of which not one-tenth is known to those most interested.”

Moreover, since the inspectorate general of the Customs Service had already sent collections to represent China in the international expositions at Vienna in 1873, at Philadelphia in 1876, and at Paris in 1878, Morse was certain that the inspector-general would be ready to assist the Asiatic Society if the public seemed interested in supporting a museum.

Of course the institution would need a descriptive catalogue, which, in its summaries of the exhibits of Chinese specimens, might display the competing products of other countries as well. Thus, Morse explained, “by the side of China tea will be shown, tea from India, Japan, Ceylon, and Java; silk will be illustrated by samples from Japan, Italy and France.” Morse believed that a sum of twenty-five thousand taels would put the museum in working order and that the mercantile public in its own interest should offer financial support. In response, the Belgian consul-general noted that commercial museums had already been set up in Brussels, Liège, and Antwerp.

Unfortunately, widespread famine in China during the late 1880s hindered efforts to get support from the Ch’ing government for the proposed museum. At a general meeting of the NCBRAS on February 22, 1889, Morse reported that without financial assistance from the Chinese authorities, any approach to the two municipal councils and the Chamber of Commerce at the treaty port would be premature. “Consequently,” he told his audience, “no further steps have been taken. . . . [The project] must be abandoned for this year at least.”

The NCBRAS, however, could more easily undertake other worthwhile projects. One involved a pioneering study of land tenure in China. This subject had been a concern of the imperial government for some two thousand years. The Asiatic Society, trying to catch up with the facts, had sent a questionnaire to a great number of foreign officials and observers, as well as merchants and missionaries. The questionnaire asked about the size of Chinese farms, their ownership, the forms of leases and of rent payments, the amounts of annual production and selling prices, and finally the averages of land tax and its form of collection. George Jamieson, the president of the society, edited the replies and published a summary article in the NCBRAS journal in 1888 entitled “Tenure of Land in China and the Condition of the Rural Population.”

Additional collections of data received from eleven missionaries
and three British officers quickly followed publication of Jamieson’s landmark article. Morse himself translated portions of a Latin treatise by the Reverend Peter Hoang that had been issued by the Mission Press at Zikawei in 1882 under the title “De legali Dominio Practicae Notiones.” Morse rendered it as “A Practical Treatise on Legal Ownership.”

The projects of the Asiatic Society provided a convenient outlet for Morse’s latent capacity for research and scholarship. Soon after finishing his translation of Hoang’s tract, he began to edit data provided by an NCBRAS questionnaire on currencies and measures: different kinds of tael, sycee (bulk) silver, copper coins, cash notes, and the like, as well as weights of all sorts and measures of capacity, length, and area. The variety of these data reflected an acute lack of standardization that had long been a medieval hobgoblin confronting merchants in China. The city of Chungking, for instance, had up to sixty different currencies of account; the choice for each transaction depended on the commodity concerned and the places involved. Some fifteen missionaries in different locations procured and sent in data with great care, and a few consular officers also assisted; but merchants, who should have been the most interested in such matters, did not respond at all.

Morse published the results in the NCBRAS journal for 1889–90. His data appeared in tables indicating the areas surveyed, the different types of tael in use, their weight and the fineness of the silver, their exchange value, and so on. A six-page table summed up the information. Similar appended notes concerned paper money. These tables formed the starting point for Morse’s later work, especially the monograph he compiled about 1905 titled *Currency, Weights, and Measures*, his article on the history of currency in China for the *Journal of the North China Branch of the Royal Asiatic Society* (1906-7), and the currency chapter in his book *The Trade and Administration of the Chinese Empire* (1908). For these publications he secured information from a great many Chinese people, and his results were authoritative—just at the time that currency reform was in the air.

Once Morse had begun as a scholar, his activities proliferated, and his reputation grew accordingly. His fifteenth Harvard class report of 1889 indicates, for example, that he not only “took some interest in local matters as Secretary of the Asiatic Society and of the far larger Shanghai library (15,000 volumes)” but also served “as one of the committee on the Polytechnic Institute and on the board of directors of the Society for the Diffusion of Christian and General Knowledge among the Chinese.”

The Polytechnic Institute and Reading Rooms, called in Chinese
the Ko-chih shu-yuan or Academy of Science, was established in 1874. The founding group included Walter H. Medhurst (British consul at Shanghai, son of the pioneer missionary of the same name), Francis Blackwell Forbes (senior partner of Russell and Company and an amateur botanist), Tong King-sing (director of the China Merchants’ Company), Alexander Wylie, and John Fryer. Fryer was a remarkable Englishman who worked for the Chinese government’s Kiangnan Arsenal at Shanghai from 1861 to 1896 and translated 143 English works on science and technology into Chinese.\(^{28}\)

The group agreed with Fryer, who became its secretary, that Christian missionary material should be excluded not only from the Reading Rooms but also from the innovative periodical on Western science and technology known as the *Ko-chih hui-pien* (Chinese Scientific Magazine), which Fryer had begun publishing in Chinese in 1876. Under Chinese management the Reading Rooms and their exhibits of scientific equipment attracted few Chinese, so in 1885 a new Sino-Western management began to sponsor essay contests and offer public lectures in the hope of encouraging greater interest on the part of the Chinese community. Morse’s letter to Fryer of January 17, 1887, expressing his great pleasure in accepting committee membership, suggests that he was wholeheartedly committed to this scholarly enterprise.\(^{29}\)

The Society for the Diffusion of Useful Knowledge (*Kuang-hsueh hui*) was founded at Shanghai in 1887. It grew out of the School and Textbook Committee set up by the China Missionary Conference of 1877, although it also had antecedents in organizations of the same name established at Canton in 1834 and Peking in 1872. Dr. Alexander Williamson, the principal founder, would be succeeded by other leading missionaries, including Dr. W. Muirhead, for whom Morse had distributed famine relief in 1878, and Dr. Timothy Richard, a Welshman famous for his assistance with famine relief and also his eminence in Chinese intellectual life.\(^{30}\)

Hart, in his capacity as I.G., applauded Morse’s public-spirited and scholarly interest in the propagation of learning among the Chinese. He had done so with Drew somewhat earlier and would do so again with Merrill later on. From Hart’s standpoint, such service on the part of Customs officers encouraged prudence and probity in administration; and of course, it created a positive impression on the part of foreigners and progressive Chinese alike.

In a meeting of February 1889 Morse, as secretary of the NCBRAS Council, announced that on the model of questionnaires already used for land tenure and currency, a circular would be sent out in 1890 on the subject
of "inland communications: roads, canals, bridges, posts, etc." He would not, however, be there personally to assist in compiling the data. As the chairman of the council then explained, the group was "about to lose the valuable services of their much esteemed Honorary Secretary," whose official duties now "called him away from Shanghai." Happily, however, Morse was "not about to sever his connection with the Society." The chairman then expressed the fear that the council would find it hard to get as able a successor to discharge the duties of Secretary which Mr. Morse had fulfilled in a manner which left nothing to be desired. People outside the Council could hardly realize the amount of routine work which the post of Secretary brought with it, and this work had, during Mr. Morse's term of office, been largely supplemented by voluminous correspondence and report drafting in connection with the trade and commerce museum scheme. He (the Chairman) proposed a hearty vote of thanks to Mr. Morse for the great amount of work he had done for the Society and for the unflagging interest which had animated him in performing his duties as Secretary.

Morse, in returning thanks, mentioned the great assistance he had always received from the members of the society generally, especially in providing matter for the journal. Then he was off to his first commissionership, at Pakhoi, a remote outport on the Gulf of Tongking.

**Acting Commissioner at Pakhoi**

In 1889, after fifteen years' service in the Customs, Morse found that promotion to the commissioner level obliged him to exchange the amenities at the inspectorate general in Shanghai for the drab frustration of a post in the far western reaches of Kwangtung province, near the southern border of Kwangsi. This promotion was a considerable upward move, but in moving outward at the same time he dropped down from the top-level team of Shanghai men of affairs. Customs officers took this type of shift as a matter of course even though their wives might be dismayed. The resentments and frustrations that simmer below the surface of most bureaucracies were not lacking in Robert Hart's imperium, but we have no evidence that H.B. Morse ever succumbed to them. It must be said, however, that Pakhoi offered a particularly grueling test. On the other hand, it provided excellent material for Morse' later histories.

Before taking up his appointment as acting commissioner at Pakhoi,
Morse stopped en route to take charge briefly at the port of Kiungchow (Ch’iung-chou). This was the prefectural city of Hainan Island, situated three miles inland from the seaport at Hoihow (i.e., Hai-k’ou, “Sea mouth,” now the name of the port). Its opening had been stipulated in the treaties of 1858, but as no one showed much interest in it, the actual opening was deferred until the American minister, urged on by a U.S. merchant, pressed for it and the Chinese made it a Customs port in 1872. The British then explored establishing a consulate there. Mr. B. Brenan of that service went to make the reconnaissance, reporting that neither Kiungchow nor “the little walled town of Hoihow which served as its port” would do. Hoihow, he explained, could only take flat-bottomed sampans for twelve hours out of the twenty-four; and “vessels drawing more than 10 feet could not come in closer than 3 miles away.” It was “apparently very dangerous in a gale,” and there were “independent savages” in the central forest areas.34

In 1876 the British sent a vice-consul to Kiungchow. He had the misfortune to occupy consular quarters in a dreadful former rope warehouse adjoining a “native inn,” where “the guests often kept up a din day and night.” Naturally enough, this vice-consul’s and his successors’ opinions of the place were uniformly negative. One of them described Kiungchow as “the unhealthiest post in China,” and another stated that it was of “extremely little use,” “perhaps the least desirable” of all the treaty ports.35 Luckily the Morses only had to stop off at Kiungchow for two weeks during a gap between that post’s commissioners.

When they finally reached Pakhoi, Hosea had his first experience of taking responsibility for a port and its Customs operations. It was also his and Nan’s first sustained exposure to the health-threatening semitropical climate of South China. Pakhoi (Pei-hai; lit., “Northern sea”) had become a treaty port in 1877 as the outlet to the Sea of Linchowfu, thirteen miles distant. Like other ports on the Gulf of Tongking, it had but one tide every twenty-four hours. “Fishing and piracy,” Morse reported, were the “bye industries.”36 It was a sleepy area connected with world trade chiefly by way of Canton to the east and the new French port of Haiphong in Tongking (Northern Vietnam) to the west. One can hardly think of a less important place to be—except, perhaps, Kiungchow.

At the time of Pakhoi’s official opening as a treaty port in the summer of 1877, the British had raised the Union Jack and held a big celebration.37 That fall the North China Herald carried the following report:
As to business . . . the prospect for foreigners is good if they work carefully. The town is increasing, and there are large exports of sugar, oil, rice, tea etc., while opium and piece goods are distributed from here inland. The anchorage is a mile and half from the town. There is good landing at high water, but at ebb tide only for small boats. Quite a fleet of junks is assembled now, giving the place an important look. The language spoken is mostly a dialect of the Cantonese. As you may suppose, news is a scarce article in an out-of-the-way place like this with a foreign community numbering nine souls only.  

Another reporter for the *Herald* wrote in February of the following year:

The places now opened to foreign trade [in this area] are of less importance [than other treaty ports], and experience has shown that the value of the outports is rather as affording fresh points of contact than as affording remunerative business to resident foreign merchants. . . . The opening of Pakhoi is perhaps more important, happening as it did nearly coincidentally with that of Kiungchow in Hainan, and that of Haiphong in Tonkin. The three ports together afford opportunities for an all round carrying trade which encourages steamers, and the facilities of carriage thus afforded are the best guarantee for the development of whatever trade the newly-tapped districts may afford.  

In fact, however, Pakhoi did nothing for commerce. Most goods went from Haiphong straight to Hainan and north, bypassing the lonely outport altogether. Haiphong also received most of the Yunnan traffic. The local dealers had their headquarters with Macao houses or dealt with Shanghai by preference, and native junkmen were not friendly to either the steamers or the Customs Service.  

One is left to wonder, then, why Pakhoi was ever selected as a treaty port. Perhaps it was because France’s ambition to tap the trade of South China through Haiphong inspired London and Peking to open a port nearby. That is, the decision was strategic (based on rivalry and fear) rather than pragmatic (based on trade and practical prospects). Another factor may have been the eternal optimism of many foreign merchants who, despite grim prognostications to the contrary, continued to believe that the opening of more ports would inevitably mean more trade. This much is evident: matters failed to improve over time. “British trade remained obstinately non-existent, and in the mid-eighties there were only eleven foreign residents” at Pakhoi—a net increase of two since 1877.
When Morse reached Pakhoi in 1889 he found that the foreign community consisted of consuls, missionaries, and a small Customs staff. Only one foreign firm, Messrs. Schomburg Company, appears on the plan provided in the Decennial Reports of 1882-91. As many as forty big junks could find safe anchorage behind the harbor’s sandbanks, but the few steamers in the area—and then only small ones—had to anchor farther out. The Maritime Customs office was at the extreme eastern edge of the Chinese town. The foreign settlement in between included the French and British consulates, the (English) Church Missionary Society buildings and its thirty-bed hospital opened in 1887, and the Missions Etrangères. Rudimentary medical care was thus available, and a telegraph line to Canton had opened in 1885. In 1888 Governor-General Chang Chih-tung even visited Pakhoi on an inspection trip.42

Unfortunately, of Morse’s first assignment in charge of a port we have little record. Either he was not asked to write fortnightly semiofficial letters to Hart, or he failed to keep press copies, as he did later. At any rate, Pakhoi was such a backwater that there would probably have been little for him to report. On the other hand, the lack of action gave Morse more time for productive scholarship: his introduction to the Currency and Measures symposium for the NCBRAS is dated Pakhoi, January 11, 1890—six months or so after his arrival.

Nan is seldom mentioned in Morse’s official or semiofficial correspondence. We know from scattered references in letters from subsequent stations that she occasionally helped her husband with his official correspondence and that she enjoyed hobbies such as gardening, plant collecting, and painting; but life at Pakhoi must have been fundamentally miserable for her—not least because she “didn’t speak a word” of Chinese.43 To be uprooted from a large, cosmopolitan city like Shanghai and transplanted to an isolated backwater could only have been traumatic.

If Nan indeed reacted negatively to the primitiveness of the place, she was not alone. According to P.D. Coates, the first British consul at Pakhoi “went out of his mind” there. On a visit to Hong Kong “he ran naked to the hotel dining-room where some ladies were breakfasting, and he handed the Consulate papers over. . . only when the Hong Kong police were called in.”44 France established a consulate at Pakhoi in 1887, and when the British Legation asked their own consul if the French had designs on the place, he responded that “unless France embarked on appropriation of Chinese territory on a larger scale, the local French would regard French acquisition of Pakhoi as an absurdity.”45
Finally, beginning March 31, 1890, Morse was given two years' leave, to March 31, 1892, at the rank of deputy commissioner. He and Nan returned immediately to the United States, where Hosea attended his Harvard reunion in June 1890. It was probably at this time that his classmate Richard Henry Dana III began to assume responsibility for Morse's financial affairs—a job he continued to perform until Morse retired from the Customs in 1909. Although the two men had traveled in distinctly different social circles during their Harvard days, they developed a lasting friendship and remained in touch. Dana not only found Morse to be "a most interesting man," but he also came to appreciate the other China-based members of his class, who supplied valuable information for his investigations into foreign service reform.

Of Morse's two-year leave in 1890–92 we know little. He reported to his class only that he spent it "between America and Europe, getting in a whole summer at the White Mountains in New Hampshire, and a winter in Italy." The Morses returned to China in the spring of 1892. By this time the career standing of the Harvard men of 1874 showed Merrill as full commissioner at Ningpo, Clarke as acting commissioner at Lungchow, and Spinney about to become acting commissioner at Takow-Tainan in southern Taiwan. Morse, for his part, was acting commissioner at Tamsui, on the northern end of the same island province.
7

Tamsui
1892–1895

When Morse took charge as acting commissioner at Tamsui in March 1892, he was thirty-seven and had had a varied experience in half a dozen posts. Each post had been different, and Taiwan, then generally known as Formosa, was to be different again. Morse would wear two hats while on the “Beautiful Isle”: one as a reform-minded Ch’ing bureaucrat intent on effecting meaningful change, the other as a principal actor in a drama of war and rebellion. Since Morse’s experiences in Taiwan exerted a powerful influence on him in several key respects, let us set the stage on which he operated in some detail.

Taiwan in Space and Time

Taiwan was a partially assimilated border area—a latecomer to the Chinese Empire, situated a hundred miles or so out to sea. In Morse’s time the mountainous island still sheltered about two hundred thousand warlike aborigines of non-Han extraction. The Han Chinese, who began coming in large numbers from the mainland only with the Ming dynasty (1368–1644), first settled on the western side of the island, where the land slopes toward the sea and provides fertile fields for growing rice. During the fifteenth and sixteenth centuries the growth of maritime trade in East Asia brought Taiwan and the nearest mainland province, Fukien, into a close economic partnership. The port of Amoy, for instance, exported sugar and porcelain and was at the center of a great ocean trading network.1 But this flourishing trade was illegal, because until 1567 the Ming government banned all travel abroad. As a result, the growing foreign commerce was considered smuggling, easily accompanied by piracy. Taiwan, directly across the strait, accordingly became a great smuggler’s den.
In the seventeenth century the Dutch East India Company, headquartered on Java, established an outpost at Tainan in the southern part of the island. By 1642 the Dutch had succeeded in dominating Taiwan's few ports and developing trade with the mainland. They also encouraged immigration, so that by 1660 the Chinese population on the island already totaled some fifty thousand. Meanwhile, the invading Manchus had established the Ch'ing dynasty (1644–1912). In 1661 the Dutch were expelled by the coastal sea lord Cheng Ch'eng-kung (Koxinga), who also resisted Ch'ing efforts to impose Manchu rule on the island. The Dutch tried to assist the Ch'ing, but by this time their position had been sufficiently undermined to end their influence. In 1683 the Manchus finally recovered Taiwan.

When the Ch'ing government placed the island under direct administrative control, it was considered merely a prefecture of Fukien province consisting of three counties. The capital at Tainan presided over two local county administrations not unlike those of the mainland; the third rather large county to the north was thinly populated, poorly controlled, and bordered on the east by an aboriginal area off-limits to Chinese settlers. Because of the threat posed by the belligerent non-Han populace, the military administration rivaled the civil government. The Ch'ing authorities devised a number of schemes and reforms designed to sinicize these "savages," but they remained separate and dangerous. Conflict arose especially in relations between aborigines and Chinese settlers over land rights, but it was also present in the intervillage feuds and lineage or "clan" vendettas that accompanied the growth of the Chinese population. This new frontier region lacked the cohesion afforded by the long-established kinship groups that dominated Ch'ing society on the mainland.2

Taiwan's domestic instability created international complications. When natives of the island kingdom known as Liu-ch'iu (Ryukyu, in Japanese)—which both China and Japan claimed as a loyal tributary state—were shipwrecked on Taiwan and massacred by the aborigines in late 1871, the Japanese government took action by sending a naval expedition to punish them. In May 1874, just before H.B. Morse first arrived in China, this expedition landed in Taiwan, chastised the aborigines, and proceeded to settle in. The Chinese government, duly aroused, managed to secure Japan's departure through Western diplomatic intervention (and the payment of a five-hundred-thousand-tael indemnity), but the message was plain: the Chinese must either take responsibility for the entire island of Taiwan or lose it to imperialist aggression. The Ch'ing government therefore made stronger attempts to control the aborigines and created a new prefec-
ture for the northern half of the island, with county subdivisions. Its capital was constructed in the north at Taipei (also known as Taiwan fu).

The outbreak of hostilities with France in 1884 over the boundary between China’s southern provinces and the northern part of Vietnam had produced a crisis in Taiwan. Since French naval action threatened to include the strategically located but highly vulnerable island, Peking dispatched one of Li Hung-chang’s principal lieutenants, Liu Ming-ch’uan, a general in the Huai army, to bolster defenses. Liu reached Taipei in time to repulse the French, who attempted to land at Keelung on August 5 and 6. During the next several months Taiwan became a major theater of Sino-French conflict. In October 1884 the French managed to seize Keelung and its coal mines but were thwarted in their attempted landing at Tamsui. This failure led to a French naval blockade. At one point the French almost captured the capital at Taipei but were successfully driven off by Liu Ming-ch’uan. After the Sino-French conflict ended in the spring of 1885, the Ch’ing government made Taiwan a regular province, with Taipei as its capital. Liu Ming-ch’uan became governor, and for the next five years he pushed his reform efforts. Taipei gradually acquired the trappings of modernization with proper streets and the beginning of a railway. 3

Governor Liu’s military organization developed through campaigns against the aborigines in the northern mountains. Chinese settlements had purposely encroached upon tribal areas—particularly where camphor, an aboriginal specialty and their chief export, was produced from an indigenous species of mountain laurel. Local Chinese recruited for expeditions against the aborigines formed semiprivate armies under family leaders, although they remained on the public payroll. In their campaigns the Chinese used the latest type of armament in the form of machine guns, land mines, and fire bombs to destroy the villages from a distance and also to defoliate the jungle where the tribesmen were fighting. The aborigines on their part lured the Chinese forces into the hills and ambushed them time after time.

Governor Liu built his civil and military reforms on revenues derived from trade in local commodities such as opium, tea, camphor, coal, and gold. He also relied on the cooperation of local notables who became heads of the various bureaus (chü) that administered special projects like railroad building, mining, and new forms of taxation. These ad hoc institutions had precursors that were equally active on the mainland. In each case, the governor chose bureau personnel from among his personal followers, a practice followed not only by Liu Ming-ch’uan but also by his successors
in Morse’s time. The large family networks of northern Taiwan society thus became attached to the governor on a patron-client basis. Even the land survey and tax reform program initiated by Governor Liu was headed by gentry managers who were able, as usual, to combine this public function with private family gain.

Taking Charge at Tamsui

From the 265 pages of Morse’s press-copy letter books containing his semiofficial, fortnightly letters to Robert Hart and some of his official dispatches, we are able for the first time in Morse’s career to follow his day-to-day activities in coping with a commissioner’s problems.4

The Customs establishment of which Morse took charge at Tamsui in January 1892 had been initiated in 1863 after the opening of the port by the treaties of 1858. It was located at the estuary of the river northwest of Taipei. Tamsui or Tan-shui (“fresh water”) was the name of both the river and the harbor; but the place in the local patois was known as Hu-wei or Hu-peii, romanized by the foreigners as Hobe. This small Chinese town rested on a fertile level area on the north bank of the Tamsui estuary. In the eyes of most observers it was not very attractive. A British naturalist described it in the mid-1860s as “a long rambling town” consisting mainly of “a narrow street of shops of a poor description, paved with great cobblestones or else not at all and in which pigs of all sizes and barking dogs dispute the passage.”5 Although it was the local administrative center, for a considerable period of Morse’s time no civil magistrate resided in Hobe. This situation encouraged a certain lawlessness disruptive to the fifty or sixty Chinese Customs staff living there.6

The map supplied in the Decennial Reports of 1882–91 shows the Customs establishment and British consulate downstream from this Chinese town. After the treaty port was set up, Western merchants built their settlement about a dozen miles upstream at a place they called Twatutia, also spelled Twa-too-tea, on the south bank of the Tamsui River about a mile north of the Taipei city wall.7 By the mid-1890s it had grown to include about twenty merchants and thirty thousand Chinese residents. In all, Taiwan presented an attractive picture to the new commissioner and his wife. In his second letter to Hart, Morse wrote that “Mrs. Morse is so far in love with what she sees of [the island’s] external aspect.”8

A degree of modernization had already taken place at Tamsui, inspired by Governor Liu, who left office because of illness in the spring of...
Diversity had been added by the opening of the sub-treaty port of Keelung on the northeast tip of the island, where a coal deposit was being erratically developed. A new railway line ran precariously from Taipei to Keelung and, after the early 1890s, from Taipei to Tamsui. In 1888 telegraph service between these latter two points was extended across the Taiwan Strait, from Tamsui to Sharp Peak, at the mouth of the Min River below Foochow. Before leaving Taiwan in 1891, Governor Liu had electric lights functioning in Taipei and rickshas imported from the mainland. The shorefront at Twatutia had been bunded and a “commodious” foreign clubhouse built. Roads were also being developed. Nevertheless, in early 1892 the new Customs commissioner moved into a still rather primitive environment.

Morse’s domain included the customshouse with its business and residential buildings on the foreshore of Hobe and the outpost subport of Keelung. Two foreign Customs employees and a Chinese staff maintained this outpost, while about seven foreign employees were at Tamsui, about equally divided between indoor and outdoor staff. The indoor staff consisted of Chinese clerks, who did interpreting and translating, and accountants and writers, who handled letters and documents. The outdoor staff, headed by the harbormaster, was responsible for “[controlling] harbours and port anchorages; examining exports and imports to ascertain their nature, quantity, and quality; and [checking] such details with the merchant’s applications; to prevent clandestine landing and shipping of goods.” They were mainly recruited from the foreign seafaring population of the large ports. The Chinese Customs superintendent (hai-kuan chien-tu), Shao Wen-p’u, had his yamen nearby but occupied it as a sinecure with very little activity. Morse’s primary official contact at the local level was the British consul, who resided nearby, not too far from the shipping activity, which was his special concern. Morse’s immediate superior in the Ch’ing bureaucracy was the governor of Taiwan in Taipei, now Shao Yu-lien, a former Shanghai circuit intendant and diplomat.

In his official capacity, Morse functioned as the central link in a triumvirate between the governor, himself, and the British consul. When he arrived, the consul was Alexander Hosie, who became one of the most distinguished members of the British consular service in China. Morse’s immediate predecessor in the Customs was Friedrich Hirth, a scholarly man from Germany who produced textbooks on both documentary and Customs Chinese. Morse had known both men in Shanghai during the late 1880s, when all three belonged to the North China Branch of the Royal Asiatic Society. Hirth spent three days initiating his successor into the job.
Improving Facilities and Procedures

Morse caught on quickly and liked what he did. On April 10, 1893, he enthused to Hart: “In fact this place is full of interest. The work too is just about right: enough to keep me fully occupied, but not enough to press hardly on me.” Much of Morse’s life was devoted to the task of daily superintendence of both his outdoor and the indoor staff, whose work ran according to the careful, explicit, and voluminous regulations Hart had developed over the years. The indoor staff devoted its attention to reporting. In the last three months of 1894, for example, Tamsui sent thirty-four official dispatches to the I.G. in Peking, many of them with enclosures, all of which had to be copied for the record. Among the routine Customs documents for Peking, many assembled by the outdoor staff, were those for shipping, docking and storage, baggage, passports and post, finance, staff, and political and legal matters, all in meticulous detail. Other documents had to be sent to various Customs departments. For example, a “report on lights, buoys and beacons for 1894 went to the coast inspector,” who was stationed at Shanghai in charge of the coastwise lights and aids to navigation. Among the routine reports due for 1894, Morse noted a “cemetery account,” a “revenue Steamer expenditure return,” and a “return of leaves of absences.”

Although Morse’s day centered mainly on routine paperwork, he found time to make changes in the working environment at Tamsui. Renovations, such as the repair of roads, involved cooperation between the Customs, local merchants, and the Ch’ing authorities. After a September 1892 typhoon damaged the shore road, for example, Morse told Hart: “I got [a] subscription of $137.50 from Chinese merchants only and have repaired the damage. I later on got annual subscriptions of $65 (beginning next year) from the guilds to maintain it in repair.” The British merchant Ashton supervised the repair work. Morse also made a deal with the Chinese military official in charge of the local forts to bridge a large breach in the road below the customhouse caused by an October typhoon—“he supplying the labor and we the material for a bridge.”

Occasionally Morse collaborated with individual Western merchants. During late 1892, for instance, after the I.G. had rejected the new commissioner’s proposal to reconstruct the customhouse jetty at a cost of several hundred dollars, the British merchant Cass of Lapraik, Cass and Company expressed his willingness not only to build a pontoon as a jetty and to lay down rail lines from the jetty head to his godown, but also to
finance the building of an examination shed with its furniture in front of his godown. Morse consulted his staff and decided on a shed “fifty feet by thirty feet across the entrance to the godown, half for examination, half for examined cargo awaiting boats.”

These arrangements helped Morse to solve a major problem. Locally grown teas arriving on coastal boats from other Formosan ports had to be unloaded and processed in Tamsui and then reloaded for export on ships handling only international trade at treaty ports. The procedure involved a number of permits and the payment of several separate fees. Ships arriving with foreign goods were obliged to bring “bulky cargo down to the Customs jetty (at the extreme lower limit of discharge limits),” which meant the loss of at least half a day to the boats before goods could be reloaded for export. As a result, the imports were left aside unprocessed until outgoing tea shipments could be loaded. This situation rendered newly arrived imports vulnerable to theft or damage.

Morse proposed to avoid this lack of security and waste of time by allowing duty-paid imports to be available for the local trade boats as soon as they had discharged their tea export loads, without having to go elsewhere. The Customs would gain by being able to examine cargo out of the rain while keeping control over imports from first to last. Since the Customs would continue to examine cargo at its own jetty, there would have to be additional examining staff. Evidently the I.G. approved all of the arrangements, including the extra personnel. After the examination shed had been completed and furnished, the British consul joined in the opening.

As part of the ongoing effort to improve administrative procedures at Tamsui, Morse abolished the issuance of shipping permits as separate documents, instead stamping the permit on the shipping order, “as is done in many other ports.” He explained that “this will save us an hour on each steamer in the tea season in the office,” which in turn “will shorten the interval between application and issue of permit.” He also managed to register some sixty boats as a means of expediting the processing of cargo under Customs supervision. This he did by degrees, first securing the voluntary registration of some twenty-five boatmen, and then making the registration mandatory.

Naturally the new commissioner made a concerted effort to prevent opium smuggling and to secure the stores that had already arrived at Customs. Opium poppies were not grown at the time in Taiwan. Smuggling proved difficult to control because a great deal of the opium came in on junks that could dock at any port the owners wished. There was little
supervision since, except for opium, "all other imports by junk are tax free." And even when legitimate shipments arrived at Customs, officials had difficulty keeping them secure. Opium was kept in a godown with fees charged for storage, but owing to the drug's popularity and value, stealing became inevitable. Indeed, soon after Morse arrived at Tamsui, an entire chest of opium was stolen. This led to eventual repayment by Customs to the owner, Tait and Company, of 387 dollars, and to a new labeling system designed to make chests more conspicuous. Morse also arranged to have the godown constantly protected by two guards, who themselves were inspected by Customs officials to make sure they were actually on duty and not pilfering.

Morse even succeeded in encouraging a measure of efficiency in the Imperial Salt Administration. Previously the Salt Bureau, claiming exemption from Customs control, had reserved the right "to send as many junks as it pleases and moor them in front of its new godown, without reference to the Harbour Master." Morse considered this situation intolerable because it "prevents mooring of steamers in that part of the river." He complained to Hart that on one occasion "I counted 26 [junks in front of the godown], and the day before I saw the Governor 19; we should allow there 8 only." He went on to say that no more than two junks usually worked at once, and so there was no reason for large numbers of these cumbersome vessels to clog the harbor. After several months of discussions with the local magistrate and other Ch'ing officials, Morse was finally able to tell Hart that he had received a dispatch "accepting my position" concerning the harbormaster's control over the salt junks.

Not all of Morse's efforts to promote administrative change were in the interest of efficiency. Some had nobler motives, such as his attempt to curtail the kidnapping and export of women at Tamsui, which amounted to an estimated two hundred cases per year. Morse eventually convinced the magistrate to implement a permit system, such as he had initiated as acting commissioner at Pakhoi in the late 1880s, requiring that all women leaving port on Chinese vessels have a certification from the magistrate indicating that they were regular passengers.

**The Promotion of Trade**

In addition to improving port facilities and procedures at Tamsui, Morse tried to increase local production and develop trade. Part of his incentive was, of course, the enhancement of China's maritime customs revenue; but
he also seems to have been motivated by a genuine desire to help the local population. Morse was full of ideas and anxious to make a difference. When, for example, tea growers succumbed to the temptation to create larger quantities of tea by diluting the prized Formosa oolong (Wu-lung) with lower-grade varieties from Amoy and Wenchow, Morse tried to influence quality control indirectly by advising foreign firms against buying the diluted product. And when tea producers raised their prices only to find that the merchants stopped buying, Morse recommended that the growers take a loss and then cut production so that prices would rise.28

Morse offered much advice to Ch’ing bureaucrats—notably the Taiwan governor, Shao Yu-lien (successor to Liu Ming-ch’uan), the provincial treasurer, T’ang Ching-sung, and the customs superintendent, Shao Wen-p’u. All four men wanted to expand production in order to yield more tax revenues, but they differed as to the proper means. On the whole, the Taiwan authorities, especially Shao, proved far more cautious than Morse. As the commissioner remarked to Hart in a letter of February 10, 1894: “I have given up any idea of [the governor’s] doing anything, but I continue to talk over matters in the hope that some one remark may stick.”29

Few remarks stuck. Consider, for example, Morse’s advice on promoting the production of camphor, one of Taiwan’s major exports. The oil, used mainly as a medication because of its anesthetic and antiseptic properties, was distilled by steaming the twigs and branches of the highland laurel. The oil thus produced had water in it, which could be pressed out to create a more solid form. Morse discovered that although Japan and Taiwan both grew the same species of laurel, the Japanese could get twenty dollars more per picul for their camphor than the Formosans (seventy-three dollars compared with fifty-three)—simply because of their superior production methods. Morse recommended specific changes to the Ch’ing authorities, all of which would have made Taiwan more competitive, but no one listened to him.30

Morse met similar resistance from Shao and his colleagues in the realm of mining. Apparently they never quite believed that greatly increased output would justify the rather large initial expense for modern equipment; nor did they see the need to maintain the small amount of machinery that was already in place. Their preferred method of mining was simply to collect minerals on or close to the surface. In 1892 some five thousand people worked at digging gold and washing it in the river at Tamsui for an entrance fee of ten cents a day. A year later a new discovery attracted six to seven thousand men, women, and children, who paid twenty cents each.31
The situation was equally abysmal with respect to coal. In 1893 total shipments amounted to a mere 21,747 tons, not including what local gunboats required. The colliery was in the north at Keelung, the sub-treaty port of Tamsui. Morse believed that there might be a lively market for Keelung coal, but when he visited the mining site in 1894, he found "the machinery wasted and neglected." By 1895 the tram line had been destroyed, and the shipping facilities were gone. Morse told Hart: "I would urge . . . [Governor Shao] to open a colliery, but I feel sure he will do nothing, or that what he does will be on false lines." In the end, he wrote dejectedly, "it would seem better to allow natives to work their shallow pits."32

If Morse's advice had been followed, production would obviously have increased considerably in tea, camphor, and minerals. Yet even without his assistance, these commodities yielded substantial amounts of the Customs' revenue. Early in August 1892, for example, Morse reported that he hoped to receive three hundred thousand dollars in duties on tea. In 1893 the camphor trade brought in seven hundred thousand taels—well above the previous high recorded in 1891. And with respect to gold, Morse figured that the Chinese Customs treasury regularly benefited to the extent of two hundred thousand dollars per year.34 A question remained, however: What else could be done to promote trade and rationalize Ch'ing finance?

The most vexing revenue issue facing Morse in Taiwan was the relationship between foreign commercial taxes and domestic duties. New fiscal practices that first arose during the Taiping Rebellion created the problem. Beginning about 1853, local officials in central China had begun to collect a special impost known as likin (li-chin). This was a tax levied on merchants' goods in shops or at points of production and also paid at various stations on internal routes of trade. It was a light tax in each case, but it mounted to a considerable sum because it was levied on all Chinese-owned goods at each likin station. The farther goods traveled, the more tax had to be paid. Usually the new impost went to the local collectors, who, after taking their fees, passed the remainder of the funds upward through the provincial hierarchy to the provincial treasurer. By Morse's time, and in fact well before, likin had become an indispensable source of state revenue, despite its negative effect on commerce.35

In general, provincial officials wanted to keep trade in channels subject to likin. This practice, of course, ran counter to foreign interests. From the beginning the treaties provided for a single transit tax to be paid on foreign goods at the treaty ports. This would enable them to bypass all inland taxing stations. Since the transit dues were collected by Customs at
the treaty port of entry to China or of exit into the interior, such levies went
entirely to the central government.36

The division of tax receipts between the provincial and central
authorities paralleled the question of conveyance. As we have seen, ships in
international trade were expected to enter only at treaty ports and therefore
to be entirely under the jurisdiction of the Maritime Customs. They were
not supposed to ship any cargo at other ports, and if they did, they were
severely penalized. On the other hand, the Chinese native shipping or junk
trade was expected to handle Chinese goods almost entirely, and if these
vessels were carrying foreign goods, the products would go under a transit
pass. Since junks frequently used non-treaty ports, they often smuggled
goods that should have been conveyed under transit passes. There was no
inward likin at ports, only somewhat outside them.

The use of steam launches in the shipping world of China required
new policies. At Tamsui, for instance, Morse decided that foreign produce
reexported in launches would be subject to transit dues and not likin; for
Chinese produce, the reverse would be true. Native goods coming into port
in launches destined for Chinese ports would pay likin only, while native
produce destined for foreign ports would pay transit dues once it had been
transferred to foreign ownership. Most inland transit was covered by likin,
since goods of Taiwanese origin were generally Chinese-owned until they
reached a treaty port. Regarding the choice between likin and transit dues
on produce carried by launch to non-treaty ports in Formosa, Morse
proposed to the governor that he should collect a single half entry or exit
duty and distribute it under "transit dues and likin headings." Fortunately,
the governor agreed.37

Sometimes likin charges were higher than transit dues, sometimes
the reverse. This circumstance provided a temptation to shift between the
two for best advantage. The way to do so would be to change the ownership
of goods, since tax classification depended on ownership. In order to prevent
this from happening, Morse tried to put foreigners and Chinese on the same
footing. He did this in the case of tea by substituting for the likin tax
"simultaneous collection of full and half duty on all tea shipped." In other
words, at all points of entry he mandated the full payment of export duty
plus a half-duty payment as a transit duty—the appropriate amount allocated
to likin. Morse based his plan on a "full and half duty" scheme proposed by
Hart several years earlier but never implemented.38

The problem with this idea was that ordinary tea likin yielded to the
governor of Taiwan about $350,000 worth of revenue a year, while the
half-duty likin would amount to only about $260,000. The governor obviously did not want to absorb this kind of loss. As time passed, Morse came up with additional sources of revenue to make his plan more palatable. But when the scheme began to include non-treaty ports, the governor balked. On the one hand, he worried that he could not “trust the Chinese alone at the sub-ports.” On the other, he thought that having foreigners manage duty collection at these places “would make the plan too expensive.”39

Such problems in the hybrid world of “foreign” and “native” trade were compounded by the peculiar nature of the daily contact between Maritime Customs officials and Chinese functionaries within the local yamen. Morse’s relations with the customs superintendent, though steadily maintained, remained largely perfunctory. The man at Tamsui turned out to be a relative of the governor who occupied a sinecure. He had no connection with the likin tax and merely maintained the Chinese Customs Bank into which revenue from Customs duties was paid, to be accounted for by the Customs and ultimately sent to Peking. Morse wrote that the man did practically nothing and was lethargic at what he did.40 If his account is accurate, we can easily see why the well-intentioned and energetic acting commissioner occasionally became frustrated.

The Discomforts of Home

Morse took responsibility not only for the work of his local staff but also for their general welfare. In all, there were eight foreign members in addition to himself and Nan, and fifty or sixty Chinese. Conditions were less than satisfactory. In the first place, Tamsui’s weather left much to be desired. According to one contemporary observer, it was “not healthy even for Chinese, far less for Europeans.”41 Summers were hot and humid; winters tended to be “wet and wind without, damp and mould within.”42 The Treaty Ports of China and Japan (1867) indicates that during the rainy season, from late November to early May, “[t]he dampness of the air makes it unpleasantly cold, though the thermometer shows a high figure as compared with the same latitude on the China coast.”43 Periodic typhoons only added to the misery.

To avoid the dampness, some of the Customs housing had already been put on raised piles. This now had to be done for the rest of the quarters. The new harbormaster began to supervise the carpenters’ work on the housing. Roofs also needed repair. Furthermore, it seemed essential to put out of action the adjacent rice fields that provided so much dampness to the
Mercy Dexter Park Morse,
Hosea’s mother, 1880s.
Courtesy of Jean Osborne.

Albert David Morse,
Hosea’s father, 1880s.
Courtesy of Jean Osborne.
H.B. Morse (right) at his graduation from Harvard. The rest of “The Four” for their Harvard graduation (1874) and at their fiftieth reunion. (Morse’s reunion photo appears opposite page 1.) Harvard University Archives.

H.F. Merrill
Janet and Bertie (Albert Parks) Morse, Hosea’s niece and nephew and wards. Courtesy of Jean Osborne.

Hosea and Annie Josephine (“Nan”) Morse at Munich for the health, 1911. Courtesy of Anne Welsford.
John King Fairbank at Fukien doing research, c. 1934. Courtesy of Wilma Fairbank.
The Shanghai Customs House, 1880. Peabody Essex Museum.

Charles F. Thwing, president of Western Reserve University, who corresponded with H.B. Morse from 1908 to 1934. Harvard University Archives.
Miss Spence, Commissioner E.B. Drew, Nan and H.B. Morse in costume at Shanghai, 1887. Courtesy of Anne Welsford.

The Morses' house, "Arden," at Camberley, Surrey, where H.B. Morse lived from 1914 until his death in 1934. Mrs. Morse is standing on the porch. Courtesy of Anne Welsford.
Anne Welsford at Cambridge University, c. 1930

The West River at Lungchow, 1890s, presumably sketched by Nan Morse, who also made botanical sketches. Courtesy of Anne Welsford.
Customs property. Three weeks after Morse's arrival, when the acting commissioner first visited Keelung, he found that building repairs were needed there as well. Everywhere things seemed to be falling apart.

On leaving Tamsui, the previous commissioner, Hirth, had urged that immediate attention be given to housing; but improvements came slowly. When the Morses moved in, they discovered that although their official residence was "fully furnished," several days of furniture repair and concerted cleaning still had to be spent in order to make it habitable. Morse later informed Hart that when he arrived at the commissioner's house, the stables and offices were completely "unfit for use." Seven servants lived, ate, and slept in two small rooms, and the assistants who had the misfortune to sleep on the ground floor "get wet in going to bed when it rains." Morse managed to fix up five rooms for nine servants and to arrange for "a tight roof over my cows, and the laundry restored." But dampness continued to be a nuisance. On August 25, 1892, the acting commissioner complained to the I.G. that "guests will not come to me: they say they prefer not to sleep on the ground floor." Poor hygiene compounded the problems of dismal weather and inadequate housing. Morse's toilet facilities were primitive: the outhouse or privy was sixty-five steps outside the back door, making chamber pots a critical responsibility of the house coolie. The source of the commissioner's water supply remains obscure, but we know that he found it essential to dig an artesian well for the outdoor staff quarters. Staff members came and went, but few appear in Morse's semiofficial correspondence. Much of their movement appears to be related to health—if not for themselves, then for their families. In fact, Taiwan "became notorious among foreigners for unhealthiness." Nan pasted a note in a book of her plant sketches remarking that fever prevented any work during the summers and into the second winter.

Of the two main ailments, diarrhea and fever, the former was so prevalent as to be seldom worth mentioning, and nearly everyone occasionally came down with the latter. The one doctor in the community, Dr. Angear, received support from the Chinese military hospital at Twatutia and was also available for the foreign community, which numbered about twenty people. When the provincial treasurer cut off the allowance for the military hospital, Dr. Angear could no longer support an office assistant. Yet he seems not to have been free to leave. Morse reported to the I.G. in November 1892, "I have told him [Angear] that I would have to insist on his constant presence
We may wonder what hold the commissioner had over the good doctor; perhaps he was paid a retainer by the Customs Service.

From his time in Tamsui onward, poor health became a recurrent problem for Morse. Although his Taiwan letters do not dwell on his symptoms as much as communications from subsequent port assignments would, it is plain that he suffered, sometimes intensely. A letter to Hart dated July 7, 1894, refers to a “return of my trouble,” and about three months later Morse tells the I.G. that he has been “out of the office nearly all of last week.” At this time he gave his weight as 109 pounds, “just 18 below my summer normal.”

What was Morse’s affliction? No one at the time seemed to know, but modern knowledge has made possible a tentative diagnosis. Based on Morse’s descriptions, it appears that he contracted schistosomiasis, a freshwater parasitic disease that was endemic on Formosa and the Chinese mainland from the Yangtze valley south. One can acquire the disease by so simple a gesture as putting a finger into an infected aquarium, and by some accounts about fifty million Chinese still suffer from it. Although researchers began to investigate schistosomiasis in China as early as the 1890s, their findings did not become part of mainstream medical knowledge until the 1920s. Doctors simply did not know what to make of Hosea’s painful and debilitating malady.

Having no occasion to get away from Tamsui either on leave or on business trips, Morse achieved improved health by changing altitude. He chose a site on a spur of North Hill for his retreat, twelve hundred feet above the harbor. He got on well with the local people, and during his three years at Tamsui he managed to build on the spur at his own expense a small house of stone with three rooms, each twelve by twelve feet. Its roof was probably of thatch on a frame of bamboo and matting, its windows presumably latticed and covered with paper. Though high above the sea, it was within sight and signaling distance (by flags or lights) of the customshouse. Going up took four or five hours on foot or by litter; coming down, only about an hour and a quarter. Staff members who had taken ill, including Morse himself, were much improved when given a few days respite in this hideaway.

Social Life and Amusements

Ever mindful of his employees and their well-being, Morse helped to establish a small club in Hobe for their enjoyment. Of its eleven members,
nine were Customs staff. They wanted a recreation center and library, both of which Morse arranged with grudging permission from the I.G. In a dispatch dated December 23, 1893, Hosea reported to Hart that the Customs Library boasted about two hundred volumes and that it was proving to be a useful resource. He also managed to get a tennis court rebuilt on Customs property.\textsuperscript{54}

Despite his periodic illnesses and the small size of the foreign community at Tamsui, Morse managed to maintain the semblance of a social life. On November 8, 1892, he reported that the British consul, W.S. Ayrton, had arrived and “taken charge from Hosie, whom I shall miss and who made a good Consul. Yesterday at tiffin we were twelve, viz. three Hosies (whom we had been putting up for a few days), seven Ayrtons, and ourselves.”\textsuperscript{55} About a month later Morse told Hart, “We are getting ready for Christmas. The Ayrtons [will] give a big dinner (twenty) on Christmas eve: with our (small) rooms . . . we have to divide our party into two dinners, Christmas night and New Years eve; Trannack [the harbormaster] gives a dinner at New Year; and that is all.”\textsuperscript{56} For Christmas dinner in 1893 the Morses were finally able to seat seventeen people by extending their table into a seven-foot-wide hallway.\textsuperscript{57}

To offset the boredom of life in a frontier outpost, Morse became for a time an avid naturalist and collector. Formosa was particularly suited for this avocation. It was sufficiently undeveloped to allow many species, some found only in Taiwan, to flourish undisturbed. By the 1890s Britain’s Kew Gardens and other centers of horticulture were in high gear, and an interested resident of a far country could make a contribution. In April 1893 Morse reported to the I.G., who favored these avocations if they did not disrupt work:

\begin{quote}
I am beginning to add again to my collections. I have 65 species of butterflies besides some moths, all caught here as during the past year I stuck pretty closely to the port, I have nearly 50 species of ferns and add to the list every time I get a mile or more away from home; yesterday, about four miles away, I got a new butterfly and four new ferns. I am trying to find out something about the trees but can get no information, and my wife has begun to paint the flowers, but is really too busy with varied occupations to have done much in the past.\textsuperscript{58}
\end{quote}

Morse came to be guided in his botanical work by a colleague, Dr. Augustine Henry, who was an Ulsterman like Hart, about two years Morse’s junior. He was stationed in Takow (modern-day Kao-hsiung) near the
Spinneys, who undoubtedly arranged the contact. Dr. Henry's chief love was plants and trees, a field in which he was to become distinguished, ending his career as head of the National Botanic Garden in Dublin. Not only in Tamsui but later in Pakhoi and in Lungchow, Morse, under Henry's tutelage, collected plants and trained a Chinese assistant to collect for him. His wife became more and more involved in this activity and did quick and quite charming sketches, some of which survive in the archives at Kew. The dried specimens were sent to Dr. Henry, who identified them and passed them along to Kew. Nan from time to time entered into the extensive correspondence Henry maintained with the Morses until he left the Customs in 1900.59

In the fall of 1893 the Morses' domestic life was suddenly invigorated by the arrival at Shanghai of a five-year-old niece, Janet, and her two-year-old brother, Bertie. They were the children of Hosea's youngest brother, Albert, whose wife had recently died. Jobless and unable to support the youngsters, Albert released them to his mother, who accompanied Janet and Bertie to Shanghai. Nan met them and brought them back to Tamsui. Morse reported to Hart on October 23, 1893, "My children have arrived and are nice little things. They take to their new life very kindly."60 Thus began an unexpected and only partly accepted foster parentage—or perhaps we should say a true avuncularity on Hosea's part—which was also dutifully assumed by Nan. The children stayed with the Morses until June 1896, when Hosea and Nan went to Lungchow. At that juncture Janet and Bertie were sent to Nan's sister in England, where they remained until the Morses arrived on their 1900–1902 leave.

For his twentieth Harvard class reunion in 1894 Morse sent an upbeat report, noting that after his return from leave in 1892, he had

been in charge at Tamsui, with the northern half of Formosa for my district. Spinney rules "in the house of the sun," the southern half of the island, so we divide the Province between us. We four are, however, pretty well separated, as Merrill watches the mouth of the Yangtsze, and Clarke [at Lungchow] guards the frontier between China and French Tongking. I am now Deputy Commissioner of Customs on the Staff, Acting Commissioner at Tamsui, and by Imperial Decree, am a blue-button mandarin, with the third civil rank and have the decoration of the Double Dragon. I am, on the whole, well satisfied with my position, but would like the silver dollar to be worth something more than forty-seven cents. I am well off for houses, as I have one here for headquarters, one at Kelung (thirty miles away), my sub-port, one at
Taipei, where the Governor of the Province lives (ten miles away), and a chalet, twelve hundred feet up on the mountain side. We have most lovely scenery, and not too much fever, and my work is interesting.\textsuperscript{61}

In the summer of 1894 the Sino-Japanese War broke out, and Morse's work became even more interesting.
Taiwan in the Sino-Japanese War, 1894–1895

Morse met his most exciting challenge during and immediately after the Sino-Japanese War of 1894–95. This conflict arose out of contending claims over Korea’s status as a tributary state of China. Japan won the initial battle on the Korean peninsula in July 1894—a victory that surprised most Western military observers. During August and September, while Japanese land forces drove deeply into Korea and then Manchuria, the Japanese navy decisively defeated Li Hung-chang’s Peiyang fleet in the Yellow Sea. On April 17, 1895, Li signed the humiliating Treaty of Shimonoseki, which called for, among other things, the ceding of Taiwan to Japan. Although the Japanese did not actually invade the island province until a month or so before the conclusion of hostilities, Morse, as Tamsui commissioner, found himself on a diplomatic frontier of the war from the beginning, since China sought to prevent shipments of arms through the Taiwan Strait from Europe to Japan. As the war progressed, Morse took an increasingly active role as an adviser to various Ch’ing officials; and after most of the fighting had stopped, he helped pave the way for a smooth Japanese takeover in the midst of a quixotic effort to establish an independent Republic of Taiwan.

The Customs in Peace and War

Part of Customs work was diplomatic by default. Although more than fifty years had passed since the signing of China’s first unequal treaty with Great Britain, the Ch’ing government still lacked many of the mechanisms of Western-style diplomacy. The foreign powers, for their part, often lacked adequate consular resources in China—particularly in out-of-the-way places like Tamsui and Keelung. As Westerners in the Chinese service,
located in isolated posts as well as in major urban centers, Customs employees helped to fill both voids.

Some of the diplomatic functions undertaken by Customs personnel were closely related to their regular duties. At Keelung, for instance, a British Customs employee by the name of Dulberg was instructed by the British consul that he could act as pro-consul or consular agent for Germany but not for purposes of communicating with the Chinese authorities, only for processing shipping. When Dulberg received small fees for his services from German ships, as was proper and customary, he could not as a Customs employee retain them for himself and therefore forwarded them to the British consul. The latter, however, had no way to handle German fees and so passed the money into a general fund for the local library.³

Morse’s role in assisting the Ch’ing government’s diplomatic relations was illustrated when the British minister Sir Nicholas R. O’Conor visited Keelung on May 12, 1893. By prior arrangement the governor of Taiwan, Shao Yu-lien, sent his saloon railway carriage to bring O’Conor to Taipei. Morse saw the governor twice beforehand to arrange all details and then went to Keelung to greet the British minister and his party of eight, who landed at 2:00 P.M. After being met at the wharf by the local Chinese authorities, the minister and his party went to Taipei, where they were received at the railway station by the prefect and his retinue. Morse meanwhile went to see the governor to prepare him for the call of the minister at 6:00 P.M., a purely social affair. Morse and Governor Shao then went through the points that the British would raise the next day. The governor asked that Morse attend the meeting, but Morse said he could not do so without invitation because the minister’s residence was temporarily his diplomatic preserve. O’Conor thereupon invited Morse to be there on May 15 at 9:00 A.M. when the governor returned the minister’s visit. On each point in dispute, the governor followed Morse’s advice and made his case with good effect. Although Morse was not the official interpreter, he gave expert testimony for the governor on several subjects.⁴

Among other things, Morse represented the needs of the provincial treasury for collecting likin on nonforeign goods coming into the island. No likin could be collected if entry was at a treaty port, but the question arose as to how a port’s boundaries might be defined. The Chefoo Convention of 1876 specified that likin could not be collected on foreign duty-paid imports within the “recognized area” of the foreign settlements at the various treaty ports, but it left open to negotiation between the Chinese authorities and foreign diplomats the specific boundaries of such areas.⁵ What should be
included around Tamsui? The British minister thought that Twatutia should be, but Morse reported to Hart that he thought O’Conor “would find it hard to have Twatutia included in the Treaty port limits as there were at least two likin barriers established between it and Hobe.”

As we saw in chapter 7, Morse’s solution to the problem in Taiwan was to abolish the likin stations and simultaneously collect full and half duties instead. Like Hart, he considered likin to be an impediment to China’s commercial development. The British minister “saw no objection” to the acting commissioner’s plan “if the merchants approved,” but in fact the Chinese themselves resisted. Vested interests in the likin tax system proved impossible to overcome, and likin remained an entrenched feature of Chinese fiscal administration until 1931.

In any case, the larger, more cataclysmic events of the Sino-Japanese War soon made such financial negotiations academic. And as these events unfolded, Morse found himself drawn inexorably into them. On September 20, 1894, less than two months after the official declarations of war, a British vessel, the Pathan, of 1,762 tons register, was stopped and seized by a Chinese naval squadron led by the cruiser Nanshin. The Pathan was bound for both China and Japan, and at first the master denied having munitions on board. But “the manifest produced by him included two cases of revolvers . . . one case of cartridges [and] 300 cases of resin,” all destined for Japan. The Chinese authorities promptly took the ship into the port of Keelung.

In retrospect, one may wonder whether such a minor amount of contraband would warrant confiscation of the ship; but under the circumstances, a few arms naturally raised the question of whether other weapons were aboard. At the governor’s request, Morse went to Keelung on September 22 and put a Customs tidewaiter on board to observe the unloading of cargo, which was then being carried out by the Chinese authorities. Unfortunately, the Keelung facilities were in all respects inadequate for the task. To make matters worse, the Japanese cargo lay underneath the stores due to be delivered first at Shanghai. Rather than taking a month to unload and reload the Shanghai goods, Morse recommended to the governor that it would be best to send the ship on to Shanghai, where the Japanese cargo could be examined after the China-bound goods had been duly disembarked. This proposal prompted Shao to refer the matter immediately to Peking, and while the governor awaited a reply, Morse sent Hart a half dozen telegrams in the three-letter Customs code and went back and forth between Shao and the British consul trying to sort the situation out.
Meanwhile, utter confusion reigned at Keelung. Innocent cargo became damaged or was pilfered in the search process, since the local Chinese authorities gave conflicting orders about what to do with it. To help protect his cargo, the ship's master dutifully tried to reload the vessel at every opportunity. The Tsungli Yamen at Peking waffled, first giving approval for the ship to proceed to Shanghai in bond and then ordering a further search in Keelung. Morse, after receiving several urgent telegraphic messages from the British consul and the I.G. in the early morning of September 29, took the first available train out to Taiwan fu in order to inform Governor Shao of the chaotic situation. But the governor, under the false impression that the Pathan carried contraband in the form of cannon shot and shell fuse plugs, accused Morse of deception in telling him there was little of importance aboard.10

Knowing that Shao was a seasoned diplomat, Morse tried to exculpate himself by reading to the governor some of the rules of international law and the British Neutrality Proclamation. But Shao would have no part of it. On September 30 he and Morse had a stormy interview in which the governor "tried to fasten on me responsibility for all that had happened in the past week."11 Apparently Shao, lacking clear directives from Peking, expected the Customs Service to undertake the further search, and Morse found himself in the middle of a minor diplomatic nightmare.

The British minister, fed up with damages and delays, demanded dispatch of the British steamer to Shanghai—a course of action also urged by the Shanghai customs commissioner. The Tientsin imperial commissioner, meanwhile, demanded to know why Morse was refusing to search the ship. On October 2, in the face of numerous obstacles, a superficial unloading of 249 of the Pathan's 9,892 packages took place. At some point in the process Governor Shao apparently ordered Morse to stop the search, but Morse never received the message. Thus, when the two men met on October 3, the governor inquired testily as to why Morse had allowed the search to proceed. As if this were not enough, the British consul, who had delivered the British minister's ultimatum to release the ship, felt somehow slighted. Small wonder the beleaguered acting commissioner confessed to Hart that he was "by this time worn out with constant anxiety, daily journeys and nightly telegrams."12

In the end, amid a flurry of communications in all directions, Morse gave the order to repack the cargo. On October 5 the Pathan set out for Shanghai, and the matter came to an abrupt halt. Nothing could be proved against the ship, and the entire exercise had been one of nervous futility.
Hart’s journal entry of October 19 noted the denouement but said nothing of Morse’s role in the bizarre affair.\textsuperscript{13}

Despite periodic disagreements and misunderstandings between Governor Shao and Morse, the two men got along quite well overall. Shao provided occasional assistance to Morse, and the acting commissioner often supplied valuable advice to the governor. Their symbiotic relationship revealed itself during the late summer and early fall of 1894, when local riots flared up in northern Taiwan in response to the threat of a Japanese attack and the generally unsettled state of affairs. In August, for instance, Morse asked Shao to lend him ten rifles and some ammunition from the official stores in order to protect the Customs against a possible uprising. The governor, in return, suggested indirectly to the British consul through Morse that it would be dandy if a British gunboat could show up at Tamsui. It turned out “that the danger [Shao] feared was not from invaders or the people but from the local levies who were under indifferent control” and might easily get out of hand. The consul did not feel the situation deserved a formal requisition, but he willingly complied with an informal request.\textsuperscript{14}

Meanwhile, Morse kept Shao from making serious tactical errors in his preparations for a Japanese attack. In September 1894 the governor issued a proclamation offering a bounty for Japanese heads. Morse, representing the Customs, suggested that taking Japanese prisoners would be of more use and would look far better in Western eyes. The governor saw the point and sent his thanks to the I.G. for Morse’s timely suggestion.\textsuperscript{15}

The following month Governor Shao left on reassignment. Morse reported his departure to Hart on the twenty-sixth, noting that “when, on leaving, I expressed my gratitude for his unvarying kindness to me, he thanked me in turn for the assistance I had given him in many matters.” Morse then offered the governor his last bit of pragmatic advice: to take “ordinary passage, [so that] he would be, on a regular passenger ship, Mr. Shao not the titular Governor of Hunan,” in the event that a Japanese cruiser stopped the vessel.\textsuperscript{16}

That same day Morse called on Acting Governor T’ang Ching-sung and then reported to Hart: “He was polite, and as usual ‘buttoned up.’” According to Morse, even when T’ang was acting for the governor in 1892 “he never opened out. . . . He listened but asked no questions.” Morse went on to say: “I fear I may perhaps be a \textit{persona non grata} with the Acting Governor: I have come in conflict with him as Fantai [provincial treasurer] (i.e. with the Likin and Salt Offices) on four occasions, and have on the
Taiwan in the Sino-Japanese War

whole gained my points . . . I should have been able to recover ground with Shao, but I do not think I can with Tang.” 17

The Defense against Japan

As the Sino-Japanese conflict developed, Governor T’ang came to rely more heavily upon the wealthy German merchant Count A. Butler than upon Morse. As a veteran of the Franco-Prussian War of 1870, Butler seemed qualified to give China military advice as well as other forms of assistance. In a move reminiscent of Russell and Company’s purchase of the CMSN Company fleet during the Sino-French War, the count bought the two steamers of the Formosan government in order to put them under the German flag for protection. He also sold the governor a supply of some five thousand Mauser rifles and helped bring to the island a portion of the one-million-dollar grant given by the Ch’ing Board of Revenue (Hu-pu) to defend against the Japanese. Later Butler, who also served as the local German consul, helped the consulate move from Tainan to Twatutia. There he built a new establishment on land leased from the provincial government to him personally for thirty years. 18

At this point T’ang Ching-sung’s main effort was to raise funds for local defense, and many inquiries went out to the Hong Kong and Shanghai Banking Corporation as well as to other sources. All overtures came to nought because the only possible security was the Customs revenue, which would obviously not continue if the Japanese took the island. Morse suggested that one financial resource might be provincial likin funds, but nothing came of his idea. Instead, the governor, and then the government in Peking, set up a donation system whereby principal people on the island would make contributions to help meet the costs of the crisis. Sadly, however, there were comparatively few people of means on the island. 19

Taiwan had meager resources, whether financial or material, with which to resist the Japanese. On March 6, 1895, Morse reported sarcastically that the island’s defenses “were thoroughly organized on the good old lines. One battery of four pounders is perched a thousand feet up on South Hill, over two miles removed from the bar; no bridge is provided to give a retreat to the Hobe garrison onto the Taipei plain; searchlights in store are unfit for use; troops are never maneuvered but lately they have fired the big guns and given a little target practice for rifles.” 20 There were other problems. In order to secure the million taels granted from the Hu-pu in Peking, Morse early in February advised the governor to get the money to Taiwan
from Shanghai as soon as possible, preferably through the purchase of bank bills. But “much time was lost by the Governor’s special agent, a Lai Taotai, in bargaining with the bank; and by the time they were ready, the bank refused to take the war risk. Then time was lost in bargaining with foreign merchants to bring dollars over; and the result is that after six weeks not a dollar has come.”

In March the first war correspondent turned up from the United States “in the shape of a Mr. Davidson, correspondent of the *New York Herald*.” Morse took him to see the governor, who answered basic questions about the Japanese threat and asserted confidently that the island could be defended. However, Governor T’ang was from Kwangtung and favored troops from that province. When the Japanese actually arrived at Keelung, he replaced local Taiwanese forces with Kwangtung forces to defend the port. The latter were quickly routed, and the situation fell apart. Morse’s letter to Hart of March 26, 1895, reported that “Hotchkiss guns are to come soon; meantime guns of Chia-ch’ing and Taokwang are being put into position.” This deadpan statement from Morse to Hart indicated that the archaic artillery available dated from 1796 to 1850, the combined reign periods of the Chia-ch’ing and Tao-kuang emperors.

During March, as the Japanese shelled the Pescadores Islands between Taiwan and Fukien province, the acting commissioner at Tamsui made his quiet preparations. Since mines were then being laid in the harbor, it would soon be impossible for ships to come and go freely. Morse therefore ordered the few Western women living on the North Bank (Hobe) to depart on the last ships. On March 24 Nan took Janet and Bertie Morse by steamer to Amoy, where Hart gave them the use of a house called Hillside. About two weeks later, in early April, Mrs. Spinney also arrived.

There the two women found a congenial company of British consular wives and other Customs wives, as well as a few prominent refugees from Tamsui, including Countess Butler, wife of the German consul, and Mrs. Cass, wife of the British merchant. Nan Spinney, in her regular letter to her mother, reported that she, Mrs. Morse, Mrs. Butler, and Mrs. Cass “have great times together” and that Nan Morse, whom she described as “a dear little soul,” “spends much time with us.” “We are all,” Mrs. Spinney went on to say, “a little inclined to bemoan our hard fate but it takes the united efforts of the other three to keep Mrs. Morse from utter despair—she is sure ‘Hos’ . . . needs her and she is worrying the flesh off her bones and I am half afraid she will make herself ill.”

“Hos,” meanwhile, was busy making contingency plans. On March
26 he told Hart: "[I]n bombardment we [will] take shelter going not far and returning when the fire ceases; in riot we [will] stand by the Custom House. . . . I have told the Chinese staff that I expect them to stay as long as I stay and that I would not expose them to any unnecessary danger. . . . I told the Governor that if the last crisis should unfortunately come, he must send his mother and wife (no servants) to my house, where I should do my best to secure them from ill treatment." 26 Hart, of course, had other contingencies to consider. His journals for the period from December 1894 to May 1895 indicate that he was in touch with nearly everyone imaginable. On March 31 he wrote a long letter to Spinney at Anping, with a copy to Morse at Tamsui. It began:

> The Japanese are now at your door and their appearance on Formosan soil will be soon heard of. . . . Whether negotiations during the armistice will re-establish peace or lead to a recommencement of the war seems quite uncertain. . . . [but] if war begins afresh, trouble will spread: confusion, disorder, and anarchy will threaten on every side, and it will take several years before the Japanese forces can subdue every nook and corner of the provinces. They have however studied the country very carefully and their plan of campaign is evidently laid with foresight and precision and promises success: they know exactly where to strike, and . . . they may make shorter work of a popular uprising than those who counsel fighting to the end are expecting. 27

The I.G. went on to say that

> according to all accounts, one of the things they [the Japanese] aim at is possession of the Maritime Customs, for held by them and worked by them as the Masters—not as the servants of the Chinese as it has been our lot to be—our offices and ramifications will afford points and lines for developing wealth and strength more than anything else they could lay hands on. . . . I consider Formosa doomed: if not ceded it will be occupied in a month as far as Anping and Tamsui are concerned . . . they will be in possession of our offices and may forcibly object to our presence. 28

Pointing out that the Japanese might either leave Spinney and Morse in place as Japanese customs officials or replace them with their own customs personnel, Hart told the two men that he would draft instructions for them the next day, which would cover either eventuality. He then
expressed his sadness and frustration over China's fate, attributing it to a persistent belief "in the old-time ways." As he put it, China's officers and men although told there is open water in a certain direction would rather go down according to the *Chow Li* [Rituals of Chou, a Confucian classic], than float according to new or western methods! As far as the causes of the War are concerned and the conduct of it, all the right and all the humanity (for China disclaimed all desire for war) are on China's side; but all the success is Japan's—a picture of murder and robbery, set in a framing of vanity and pretension, and hung in a light...[that] charms, dazzles, fascinates, and then stupefies the beholder! The waking up will be for the next century and then our Great grandchildren will find the Eastern Question a very momentous one indeed.\(^{29}\)

Within forty-eight hours Hart was feeling less philosophical and more combative. A letter to Morse dated April 2, 1895, sounded like the early Mao Tse-tung on guerilla tactics:

You ought to see the Gov. and talk well into him, and through him into [commanders] Lin and Liu, that it will be vain to attempt to oppose a landing, for their ships, with their quick-firing guns which range two or three miles, will mow down any troops within reach: but once they land...[let] small bodies of men worry them day and night, never bringing on a general engagement—unless circumstances seem favorable—but keeping pegging away, advancing and retreating in loose open order... By constantly worrying the Japs on their line of march—by splitting up—by retreating among hills and woods—Lin and Liu could hold out for years! If this is not done, the Japs will own and rule the island before Midsummer.\(^{30}\)

As Hart had predicted, the Japanese found no difficulty landing. On April 7 the I.G. wrote pessimistically to Drew:

I expect this week will find Morse and Spinney in extremis, for the Japs took the Pescadores a fortnight ago, and ought now to have their preparations matured and be ready for an advance, dovetailed all along the frontier of incident in the most heartbreaking, side-bursting fashion...Japan wants to lead the east in war, in commerce, and in manufactures, and next century will be a hard one for the West. Everything that China should have yielded to Japan gracefully to others when asked for will now have to be yielded to Japan's hectoring: Japan
Taiwan in the Sino-Japanese War

will then pose and say to all creation—"that’s the way to do it, you see, and it’s I that did it!” 31

By this time the war had been won, and in two weeks the Treaty of Shimonoseki ceded Taiwan to Japan.

News of the cession of the island to Japan set off a wave of panic, fed by rising resentment against the Ch’ing government for abandoning Taiwan. On April 22 “the excitement culminated in an attack on the governor, T’ang Ching-sung, in his own Yamen at Taipeifu. The disorder continued and anarchy was imminent, and to protect foreign lives and interests, guards were sent to Twatutia—twenty-five German sailors and thirty British marines—and a British and German gunboat at Tamsui, and a British gunboat at Takow in south Formosa. Covered by this small force, confidence was temporarily restored and trade was carried on in . . . security.” 32 Morse advised the governor through the successive phases of the crises, which took several unexpected twists. First: “As soon as the terms of the treaty were known the governor and a delegation of the gentry of Formosa’ offered, on April 20th, a protectorate of the island to England, the basis of the offer being that China should retain the sovereignty and the land-tax, while England should have sole control over the administration, the cost of which should be borne by dues and duties. This having been rejected, the same offer was, on May 20th, made to France, and rejected by her.” Then, “under the direct inspiration of the war party in China, on May 24th the independence of the republic of Formosa was declared [by local Taiwanese leaders].” Morse interpreted this announcement to be “the last despairing effort” of those who favored a continuation of the conflict “to defeat the steps taken to secure peace.” 33

This Formosan declaration of independence prompted all Ch’ing government officials on Taiwan to depart immediately for the mainland, to be replaced in their posts by individuals who were considered “more devoted patriots.” The one exception was T’ang Ching-sung, “who was informed that neither he nor any munitions of war, nor any treasure,” would be allowed to leave the island. Under pressure to take his stand on the side of the newly declared republic, T’ang resigned as governor of Taiwan and promptly accepted the office of president. At this time, “a parliament was summoned, the members having been already elected by the gentry, and receiving an honorarium of 50 cents (one shilling) a day. 34 As a symbol of independence, the Formosan Republic hoisted its tiger flag over all government sites, replacing the dragon flag of the Ch’ing dynasty.” 35
On May 29, 1895, Morse reported to Hart from Tamsui that T'ang had asked him to continue collecting revenue along the same lines as before, only now under the "tiger flag." Morse reluctantly agreed to T'ang's request but sought to "avoid doing so as long as possible." "If it is required of me," he wrote, "I shall ask that a small armed force be sent to perform the act." On June 2 he withdrew the Keelung staff, and during the following week, Morse recounted for the I.G. in Peking the various events that had transpired in the northern part of the island, including the arrival of H.E. Li Ching-fang and the Honorable J.W. Foster as "Chinese envoys," appointed to hand over Formosa to the Japanese. After the easy capture of Keelung by Japanese forces, the envoys were briefed by Morse and then left to join the Japanese admiral there. Following this latter event, local Chinese officials, including the government banker, plus a large number of civilians, took refuge on the Formosan gunboat Arthur.

News of this development incited Ch'ing troops from Keelung to threaten to sink the vessel if the officials on board did not pay them funds held in arrears. On June 4 and 5 the rebellious troops fired on the ship, inflicting fifty or sixty casualties, whereupon the authorities agreed to deliver forty-five thousand dollars (about five thousand British pounds). When this amount proved insufficient, a number of soldiers began seeking plunder on shore, while holding the ship hostage. Morse described the bizarre scene in his own published narrative, entitled "A Short-Lived Republic":

Around Tamsui they [the mutinous Ch'ing soldiers], in the main, respected private property except in the shape of food, but anything with the government mark on it was regarded as their legitimate prey. Yet there stood the Custom House, open and doing its ordinary work; in its chest were, as far as the ignorant mutineers could know, thousands of dollars in hard cash; in its bonded warehouse was stored opium of a value exceeding a hundred thousand dollars. . . . During that time not a single mutineer, so far as could be seen, turned the eye of desire in our direction; and the men of my staff, who were continually strolling up and down, chatting with the soldiers, reported that they had heard not one angry, or even suspicious word, regarding us.

"Ordinarily in China," Morse told his readers, "the Customs do not handle the revenue, which is actually received by the government banker; but this functionary was a refugee on the Arthur, and during these days, for the first
and only time in the history of the Chinese Customs Service, the commis­sioner himself received the revenue. On the day of the greatest commotion, June 5th, I took in... about ten thousand dollars in drafts on Amoy, and four thousand five hundred dollars in coin.40

This money “came in usefully during the following night,” when the governor’s nephew turned up in his underclothing at Morse’s house demanding protection. At the time, Morse was in the midst of complicated and delicate negotiations aimed at securing the safety of the officials and civilians held hostage on the Arthur by Chinese artillery forces at the fort on shore. According to “A Short-Lived Republic,” the commandant of the fort “named five thousand dollars as the sum required to ransom the ship with all on board.” Morse arranged for an additional five hundred dollars “from private funds” to be added to the forty-five hundred dollars and eventually struck a deal: “The terms offered were five thousand on my being assured that the mine wires were cut and on my receiving the percussion locks of the great guns in the fort.... At 3 A.M. the wires were cut and I received the percussion locks of all the guns but one, and I then paid over the money.” At 8:30 the Arthur steamed out of the harbor. “In this way,” Morse tells us, “I parted with money which it was dangerous to keep in my possession, and with it bought a fort, with one hundred and sixty tons of artillery and its magazines filled.” He remained its “proud possessor for three whole days.”41

The commissioner’s problems were far from over, however. First he had to take elaborate steps to maintain telegraphic communication with the mainland. Then he had to deal with an unruly mob of about three hundred soldiers who “came to me and demanded food.”

I offered to feed them if they would lay down their arms; to this they demurred, as it would leave them defenceless to their fellow soldiers. I undertook to protect them, whereupon they assented and gave up their rifles and ammunition; and they received the promised protection through two members of my staff, stationed right and left of the building they occupied, and armed only with the prestige of the white man. The scene was curious; inside the cordon were three hundred unarmed men contentedly cooking their rice and eating it; outside there came from time to time bodies of armed men, eyeing hungrily their fortunate comrades inside, but turning away slowly before the warning forefinger of the armed guard. It was a piece of bluff, but we played the game of bluff through the whole of that time.42
Morse commented wryly: "These were only two of many incidents which characterized those days, and which relieved the strain of their tragedy by giving it an aspect which approached closely to opera bouffe."\(^{43}\)

During the first week of June, in the absence of all other Ch’ing dynasty authority, Morse collected the Customs revenue. From this sum he deducted the June cost of collection and gave the remainder to the Japanese. On June 8 Japanese forces began arriving at Tamsui. They quickly occupied the town, marking the end of Morse’s tenure as commissioner and the end of Taiwan’s brief bid for independence. By late fall Japan had completely crushed Chinese resistance north and south. Morse summed things up:

This is the story of a short-lived republic. It is also, though of such recent date, a story of old China. The troops, of whom the story is told, were those of the old model, without discipline or training, with defective arms and ammunition, and with their pay ever in arrear. Their comrades in the north, the men of Li Hung-chang’s army, were better disciplined, better armed and more regularly paid; yet during that war, whenever they met the forces of Japan, they suffered defeat and were driven in headlong rout. . . . In the war of 1894–95 China’s Manchurian army turned to a shattered spear, and her Formosan army pierced the hand which leaned on it.\(^{44}\)

Morse’s dispatches to Hart in June record the last official steps he took before leaving Taiwan. On the seventeenth, for instance, he recounted how the Japanese occupied Tamsui, bringing along S.J. Nomura, the Japanese commissioner of customs for the port. Morse took the proper legal position that he could not himself hand over the Customs and its dragon flag, but since he was powerless, he would go along with the Japanese action. On the other hand, he argued that the Tamsui customshouse was not the property of the Chinese government but rather that of the inspector-general of customs, and therefore he would claim compensation. Eventually the Japanese paid a round sum of fifty thousand dollars for the Tamsui property and twenty-five thousand for the Tainan property. This remarkable legal situation shows that the I.G. had built up his reputation sufficiently to act in some respects independent of the local Chinese officials.\(^{45}\)

After making arrangements to pay off or transfer the Chinese Customs staff, Morse assisted the new masters of Taiwan by helping to
ensure continuity of procedure. The Japanese asked him to stay in place until the end of June, but he replied he would act on orders from Peking to leave soon. On June 20 he reported to Hart that he had handed in the remaining accounts and concluded his work as Tamsui commissioner. He then returned to China from an island that for the next half century would be part of the Japanese Empire.
Lungchow and Pakhoi
1896–1899

After the tumultuous Japanese takeover of Taiwan, the four Morses—Hosea, Nan, Janet, and Bertie—were reunited for eleven months in the relative calm of Shanghai. Morse held the rank of deputy commissioner and spent this interim time settling his complex Tamsui accounts and recuperating from both stress and his recurrent illness. In June 1896 he took up a new assignment as full commissioner at Lungchow, a tiny port on the border of French Indochina (Vietnam). This assignment was soon followed by an even shorter stint as commissioner at the woebegone town of Pakhoi, where he had previously served and would later serve again. Despite the dismal prospect of life in remote Lungchow, Morse was apparently pleased, or at least relieved, by his promotion. He wrote to Hart on June 24 that he “had begun to fear that [the position of commissioner] was out of reach.” On the other hand, he paid a certain price for this elevation in rank: Mrs. Morse despised these outport assignments, and not without reason. Furthermore, Janet and Bertie could not accompany them and had to be sent instead to Nan’s sister in England.

Trade and Diplomacy on China’s Southern Border

It may seem anomalous that so able an officer as Morse, judging by his performance during his first two decades of service in the Chinese Customs, should have spent more than three years at a pair of backwater ports. Perhaps these appointments after 1889 were intended to help Morse recover his health lost at Tamsui. This proved to be the case at Lungchow—where the rivers presumably flowed swiftly enough to prevent the presence of schistosomiasis-bearing snails and parasites—but certainly not at Pakhoi. Another possible explanation is that Pakhoi and Lungchow were both
observation posts for watching the French imperialists in Vietnam, a fitting task for an American commissioner who spoke French.

Unlike Pakhoi, Lungchow had become a battlefield in the last stages of the Sino-French War. A doctor from a Wesleyan hospital arrived in April 1885 after a bloody encounter and described the scene: “Lungchow is prettily situated on the banks of the Song-ki kung, and is partly surrounded by low limestone hills. Under ordinary conditions the place must be very healthy, as compared with other Chinese cities, but the pestilential smell of corpses from the river and partly buried on the hillside was terrible.”

Although reasonably normal life had been restored by the time of the Morses’ arrival, the past traumas had surely left their mark. After the restoration of peace in 1885, Lungchow was opened as a “treaty port for trans-frontier trade” between China and French Indochina by the Sino-French conventions of April 25 and June 26, 1887. Situated on two rivers, it seemed to fit the pattern for growth common to much of Asia. In general, the expansion of Western trade had produced in each Asian country a new metropolis at the mouth of a major waterway. Bombay and Calcutta inspired imitations in Rangoon, Bangkok, and Saigon. Such major entrepôts for Western trade had long had Canton as a model and more recently Shanghai. The Western expansionists’ dream was to penetrate the great rivers in order to find enormous markets and unleash an outflow of natural resources. They looked at China on the map as though it were a vessel full of riches that might be drained through holes tapped in the bottom.

As a result, a considerable literature had arisen on the exploration of trade routes from Southeast Asia into South China. The British, in the rather thinly populated and relatively poor country of Burma, entertained visions of pushing on from Mandalay into southwestern China. The French had correspondingly set their aspirations on going up the Mekong to find a water route for trade with South China. French hopes were dashed when investigating expeditions under François Garnier found the Mekong to be unnavigable. But the adventurous Jean Dupuis soon claimed to have found, in the Red River inland from Haiphong and Hanoi, a route that would lead into southwestern China for French trade. One major change had occurred: by the 1890s the style of foreign commercial invasion by steamer on the rivers had been overtaken by more modern railway penetration, and so the French schemed to drain southwestern China by rail.

Eventually this idea would lead to a French-built railway up the Red River from Haiphong to Yunnan-fu (Kunming). This line was not completed.
until 1910, however. Meanwhile, other communication routes came to be considered. Lungchow’s apparent advantage was that it lay at the head of navigation on the Tso River running north from just inside the Vietnam border to the major city of Nanning in Kwangsi province. This location put Lungchow on the trade and invasion route to Tongking that, south of the border, passed through Lang Son and Bac Ninh—both sites of bitter fighting during the 1883–85 period.

Lungchow also lay next to the West River, which eventually emptied into the Canton estuary. Morse’s book *The Trade and Administration of the Chinese Empire* (1908) displays a fine photograph of the scene at Lungchow, showing a broad expanse of water leading to a narrows, on either side of which stood a pagodalike building or small tower—a view that Hosea and Nan greatly enjoyed. In fact, this was only one part of the West River. About thirty miles beyond Nanning, upstream from Canton, the river divided into “the Left Branch continuing west to Lungchow and the Right Branch leading northwest to Poseh.” At these points “boats of twenty-five tons deadweight capacity [could] safely pass the rapids.” Yet the river traffic consisted only of sampans, rafts, and small junks. Morse saw an obvious opportunity for a shallow-draft steam launch to do some towing, but steam traffic developed slowly. The first foreign gunboat (a French one) drawing three feet of water did not reach Lungchow until 1905.5

Trade remained a minor consideration at Lungchow, despite the reduction of import duties by 30 percent and export duties by 40 in an effort to bolster commerce. On arrival Morse found that aside from a minor trade in timber and anise oil, the chief Chinese export was illicit opium. It was smuggled over the border, with the well-paid connivance of the Chinese provincial authorities, and purchased by the French opium administration for distribution in its colonies. Morse’s trade report for 1897 noted the existence of “72 practicable footpaths over the frontier.” Under these circumstances, there was no way that the Chinese Maritime Customs could track down and tax this smuggled export. Thus, with the I.G.’s concurrence, the Customs took action only on goods that came to it, mainly in the trade up the river. In consequence, the revenue collected was only sufficient “to pay a third of the cost of collection.” In short, the installation of a Customs establishment at Lungchow met the needs of British imperialist and commercial strategy rather than China’s need for revenue.

Judging from Morse’s semiofficial correspondence, his two years as commissioner at Lungchow, from June 10, 1896, to June 13, 1898, became something of a rest period for him. The post was still an interesting
one, however, for the land frontier between imperialist powers at the height
of the imperialist era in East Asia had its own special troubles and fascina­
tions. As it turned out, Morse spent much of his time as a watchdog for Hart,
oberving French efforts at the commercial invasion of South China.

Morse’s semiofficial reports, and life generally in Lungchow’s
small foreign community, revolved around the French railway project.8 The
most noteworthy feature of this imperialist undertaking was the rivalry that
existed among various French interests. Minister Gérard, even after he had
returned to Paris from Peking, was still a power at a distance, with his own
ideas. Doumer, the new governor of French Indochina, was a quite separate
power with somewhat different ambitions. The French consul, François, had
his own pet aversions and a special mission: to thwart the efforts of the
Fives-Lille Company, which had recently signed a convention with China
to build the new railway. Across the border, in Annam, French military
leaders had their own particular views and plans.9

Since the French railway was not completed while Morse was at
Lungchow, his time there was mainly spent in reporting on the backing and
filling, rivalries, character assassinations, and shifting plans of the railway
invaders. The machinations of the imperialists, which kept them so busy
coming and going, provided a principal focus for Chinese concern. In this
context, Morse served as a relatively disinterested adviser to the local Ch’ing
officials—chief among whom was an able but hopelessly degenerate mili­
tary man by the name of Su Yuan-ch’un. Su held the rank of provincial
commander in chief (t’i-tu) in the imperial Green Standard Army as well as
the honorary title of Guardian of the Heir Apparent (Kung-pao). Morse
reported that he was “a man of good ideas who forgets to carry them out.”10
Although responsible for defense of the frontier, Su was so besotted with
opium that he could not remember decisions of the previous day. He knew,
however, where his financial interests lay. Instead of mustering arms to
oppose French imperialist penetration, he joined the French in negotiating
railway construction contracts, receiving a kickback in return.11

Morse himself did not believe in the Lungchow line, but he felt
obligated to help the Chinese promote the Fives-Lille Company’s plans for
the railway. If the firm were to cancel, the Chinese, under their unwisely
signed convention, would still be obliged to pay the French company
without having anything to show for it. Morse therefore repeatedly offered
Su and other Ch’ing authorities his well-considered advice. He suggested,
for example, that the Chinese employ a foreign engineer as a consultant to
look over contract terms and check estimated costs. This strategy would no
doubt have saved China a great deal of money, but it would not have profited local officials; so they never managed to get an independent expert into their calculations. The Chinese eventually signed a contract with the French for an estimated eighteen million francs—two or three times the going rate. Similarly, the Ch’ing authorities failed to employ an arbiter in their negotiations as Morse had advised. Instead they hired a French surveyor sub rosa through the Fives-Lille Company and in so doing suffered from inevitable conflicts of interest, incompetence, and inflated costs.¹²

As had been the case at Tamsui, Morse’s proposals at Lungchow for the development of local economic resources also fell on deaf ears. Although he won a certain amount of respect from Ch’ing officials for his timely assistance during a missionary dispute, Morse could not convince the authorities that his advice was as valuable as his intercession. Local bureaucrats rejected his plans for both the experimental production of camphor and the use of ram jets to lift water from the Tso River for irrigation. They also saw no value in employing foreign experts to help prospect for coal and iron, an activity that Morse believed should have priority over the mining of gold and silver.¹³ In short, the commissioner was a visionary in a vacuum. Spurned as a reformer by the Ch’ing authorities, he had time for more mundane pursuits.

**Life in the Boondocks**

The walled “city” of Lungchow had a population of only about ten thousand persons—most either local tribespeople (the Chuang minority) or Cantonese. The wall itself had been completed recently, in 1888. Two major officials, the provincial commander in chief and the local taotai (who was also superintendent of customs), had their offices (yamen) within the walled city. The telegraph office and the maritime customshouse lay outside the southern wall on the bank of the Tso River. The French had a small consulate in the area, but there was no British consulate, no hospital, and not even a foreign-trained doctor.¹⁴ Since Lungchow was such a backwater from any point of view, a great deal of Morse’s energy went into organizing practical arrangements for the customshouse and providing adequate living arrangements for himself and his staff.

Morse’s most immediate problem was finding a decent place to live. Initially he and Nan slept in the sampan that had brought them to Lungchow; their luggage arrived twelve weeks later than they did. Their first premises were in a temple, and they ate their meals in a pantry. Not surprisingly, then,
Morse lost no time in arranging for the construction of his commissioner’s residence as well as a new customshouse. He acquired nine hundred square feet of land for the purpose, close to the expected location of the railway station. The property was situated across the river from the old customshouse, on the south bank and away from the city. These buildings both became habitable in mid-September 1897. Morse was so pleased with the arrangements that he told Hart he would not mind putting in another summer in Lungchow.\(^{15}\)

Around the new customshouse a small Sino-foreign community developed. Morse’s Customs establishment itself required only a few people: it boasted an examiner, a tidewaiter named Jackson, and an office assistant named Feer, who was soon replaced by a youngster named Akermann.\(^{16}\) There were also a few Chinese employees. Morse’s contact with Lungchow’s tiny foreign community appears to have been minimal. The French consul sedulously kept Morse at arm’s length, fearing possible contamination by an agent of the notoriously pro-British I.G. in Peking. Relations between Morse and the consul were cordial enough on formal occasions but stopped there; and the Roman Catholic mission at Lungchow kept to itself. Morse’s major source of foreign news was the local representative of the Fives-Lille Company.\(^{17}\)

In all, life was pleasant for the commissioner. In his leisure time he gardened, read, and collected plants for Dr. Henry, who had been reassigned to Meng-tsze in Yunnan, again with the Spinneys. Nan enjoyed sketching the plants Hosea collected, but for her Lungchow was no doubt a lonely and difficult place—especially compared with Shanghai. For part of her stay, the only other foreign woman in town was the wife of the French consul; then another woman appeared, also French. They seemed to spend most of their time indoors, avoiding the heat. During more than half the year the afternoon temperature was above eighty degrees.\(^{18}\)

Mrs. Morse had never been particularly fond of China or the Chinese, but her dislike of both was immutably confirmed when the “head boy” (the general manager of the servants) tried to dispatch her slowly by putting poison in her soup. His aim was to get better control of the household accounts. He was dismissed suddenly on the cook’s advice, whereupon the poison was discovered.\(^{19}\) Unlike the patient arsenicists who may have gradually destroyed Bonaparte on St. Helena, this Lungchow man lacked support. But the incident put a capstone on Nan’s hatred of things Chinese. One of the first things she told John Fairbank in 1931 when she advised against his going to China was “They will poison you.”
Nan’s ten years in China after the Lungchow assignment coincided with her husband’s, and sometimes her own, continued and often debilitating illness. But during their time in Lungchow itself, the Morses stayed well. As Hosea told Hart in February 1897, “I am stronger than [at] any time since the Japan war broke out, and there has been no illness among the foreigners during the last year.” He added, with no apparent ironic intent: “This place, except for plague and cholera, is healthy.”

When Morse heard about his transfer to Pakhoi in May 1898, he wrote, “The rest has done me good, but actually it is time I went.” By this point he had become, in his own words, “nervous and fidgety”—perhaps out of frustration with the Chinese authorities for repeatedly ignoring his well-intentioned advice. Significantly, he recommended that a French successor as commissioner might enjoy better rapport with his compatriots. Lungchow was not much of a Customs career opportunity, but it did provide fine material for Morse, the historian, in later life.

At Pakhoi

When Morse reached Pakhoi on July 26, 1898, he was returning to familiar territory. An earlier resident had noted in 1877:

The town faces nearly due north, and is situated at the foot of a bluff forty feet high which deprives us of the breeze from the south-west in summer, while in winter we will be exposed to the full force of the northern monsoon, and I should imagine it will be rather cold. From the bluff an extensive uncultivated plain stretches. There is good sport—geese, duck, snipe, plover, quail, and pigeons in abundance. The population of the town is about 16,000, the European community contributing only nine to the number of inhabitants. There are two main streets; the one nearest to the sea is clean and spacious for a Chinese town. There are hosts of dogs and in the back streets one’s olfactory organs are everlastingly assailed by the abominable stenches arising from the inevitable pigsties.

By 1898 the town was only slightly larger (twenty thousand), but the foreign community had increased to about fifty—mostly British, French, Germans, and Portuguese. There were now five main streets, all partially paved, fronted by about forty shops. The fishing fleet totaled approximately five hundred sail, and there were some new industries. One of these was the unofficial export of Chinese women to Canton for prosti-
tution, a situation Morse believed the Customs establishment had a moral obligation to control.\textsuperscript{24} Ironically, many of the local Chinese men now had Vietnamese wives. There were, however, no Ch’ing officials directly on the scene.

The French consul was the chief foreign presence at Pakhoi. His role seems to have been to help the French in developing their sphere of influence in South China and along the Vietnamese frontier. He was obviously au courant. Morse found, for example, that although little information could be pried loose from the consul, the latter seemed to know everything Morse wrote or said.\textsuperscript{25} Many of the commissioner’s semiofficial letters from Pakhoi reported on mining operations undertaken by Ch’ing officials in the vicinity who were in touch with French firms. As in Taiwan, these officials persisted in prospecting for coal by digging from the surface rather than following Morse’s suggestion to use boring equipment. When the issue of building a railway line to the mine arose, Morse recommended narrow gauge, but the Chinese preferred regular. Once again, Morse’s advice seems to have been systematically ignored.\textsuperscript{26}

In his management of Customs affairs, Morse followed the precedent he had set at Tamsui in arranging for all cargo boats to be registered. This facilitated the examination and sealing of cargo, saving much valuable time in the process. Relying on Tamsui techniques, the commissioner also got a number of boatmen to register voluntarily, a procedure he eventually made compulsory. Commerce continued, accompanied by the usual rumors of brigandage and piracy at the neighboring port of Kiungchow.\textsuperscript{27} Confusion still existed over the choice between likin and transit passes, and the postal service remained inefficient.\textsuperscript{28} On the whole, Pakhoi had no great staple of trade nor any acute diplomatic problems.

In his \textit{Trade and Administration of the Chinese Empire} (1908) Morse underscored the peculiar position occupied by Pakhoi in the commercial affairs of Kwangsi and Kwangtung. He pointed out that the West River route from Canton provided a convenient channel of water communication leading all the way to Yunnan. Farther south, this route was paralleled by the alternative trade channel from Haiphong and Hanoi in northern Vietnam up the route of the Red River, also entering Yunnan. Morse considered Pakhoi to be a “dirty, unsanitary town” that was a “side door through which to evade the fiscal obstructions imposed on the natural routes to Yunnan and western Kwangsi, vid. the Red River through Tonkin and the West River through Kwangsi.” The paltry trade figures for Pakhoi illustrated “the paralyzing effect of the Chinese system of internal taxation, driving
trade from the natural water routes to a channel by which expensive transport over hill roads must be substituted."29

As a Chinese official, Morse resented the influence and authority exercised by the French at Pakhoi and wanted the Ch’ing government to take a more active role in local affairs—not only in handling revenue but also in controlling piracy.30 Toward these ends, and in order to provide more convenient access to outlying ports, Morse asked Hart if a Customs revenue cruiser could be sent to Pakhoi. The I.G. replied: “I have wired to Scho[e]nicke to let you have a cruiser for a few days, but you must act very cautiously: do not tread on French toes, alarm French susceptibilities, excite French suspicions, or provoke anything in the shape of protest or collision! The times are too ticklish to go in for adventures even on our own ground, and caution and discretion are everywhere necessary. However, you had some schooling at Lungchow and I need say no more.”31

Hart’s advice to Morse must be viewed in the light of larger developments in China during 1898. Earlier that year, an antimissionary uprising in Shantung gave the Germans a pretext to occupy the port city of Tsingtao and to claim extensive mining and railway rights in the surrounding countryside. This aggression triggered a “scramble for concessions” on the part of the foreign powers, who began to jockey for strategic positions in various parts of the Chinese Empire. The British, for instance, not only took over the harbor port of Weihaiwei on the north side of the Shantung peninsula and forced the Chinese to grant them a ninety-nine-year lease on a large area adjacent to their colonial base at Hong Kong and Kowloon, but they also claimed special privileges in the Lower Yangtze region. The French, for their part, claimed special rights in the Annam border provinces of Yunnan, Kwangsi, and Kwangtung.

This chain of events, which also involved the imperialist penetration of Manchuria by the Russians and Japanese, led in turn to a reform movement during the summer of 1898, sponsored by the Kuang-hsu emperor himself. Unfortunately for China, the emperor’s niece and adoptive mother, the notorious Empress Dowager Tz’u-hsi, nipped the “hundred days” of reform in the bud, fearing an unacceptable challenge to time-honored Chinese ways and deeply entrenched Manchu privileges. She placed the emperor under palace detention, arrested six of his so-called radical advisers, and put a price on the heads of his chief confidants, K’ang Yu-wei and Liang Ch’i-ch’ao, who managed to escape from China.

The inspector-general in Peking naturally took a keen interest in these political machinations and periodically reported on them to his com-
missioners in the treaty ports. On October 24, 1898, for example, he commented to Morse that the Kuang-hsu emperor was correct in initiating political, economic, educational, and military reforms, but his advisers were unable to translate their high ideals and Confucian rhetoric into an effective program of change. In Hart’s colorful words: “The Emperor’s head was set in the right direction but the advisers Kang & Co. had had no experience of work and they simply killed progress with kindness.”

However exciting this climate of colonial expansion and political intrigue may have been for Hosea, it probably had little positive effect on Nan. After the unfortunate Lungchow episode, China became an increasingly impossible burden for her. Communicating with her minimal staff only in pidgin English, she seemed never to accept even the intimacy of an Amah brushing her hair. Instead, she kept all Chinese at arm’s length. No servant seems to have become a trusted member of the family establishment—particularly after Nan’s unfortunate run-in with the head boy at Lungchow. Her attitude and behavior, in turn, must have made it more difficult for Hosea to create warm relationships with any Chinese, inside or outside the household.

Once installed at a port, the life of a customs commissioner’s wife can be imagined. Given the necessary staff of servants, her job was to assign their tasks and see them performed. Water, for example, had to be boiled and filtered or perhaps filtered, boiled, and filtered a second time. Kitchen stores had to be kept under control, usually by lock and key. The daily operations of cleaning, sweeping, washing, buying market foodstuffs, or emptying latrines would all be performed by others, yet for this reason such activities had to be punctiliously superintended. A backwater port like Pakhoi, with its primitive facilities and scarce resources, demanded special and sustained attention.

Taking charge at this small outpost thus greatly increased Nan’s daily burden. In Shanghai, at a boardinghouse or in a Customs residence, the cook and other servants would know and foresee the foreigners’ needs and soon learn their preferences. But an experienced houseboy from Shanghai could not be expected to function well amid the local dialects and staff jealousies in a small, isolated outport. Chicken and pork would be available, no doubt, but local beef would come from aged water buffalo and “mutton” from scrawny goats. Protecting against flies and draining stagnant water would have to be taught as part of a foreign ritual that might seem quite nonsensical. A generation later, Grace Service, in her journal reflecting her experience as the wife of Robert Service of the YMCA at Chengtu, remarked, “To tell a Boy once to do a thing is never enough. The perpetual
daily alertness of the mistress, the repetition of instructions over many months is what finally produces care in the hygienic preparation of our food and cleaning of our rooms."

For Nan Morse it was a daily job without letup. Growing flowers and vegetables could have been an enjoyable and relaxing avocation, but she would need the help of either her husband or a servant. As Janet Morse later recalled: "When you live in China you don’t do any manual labor at all . . . you never touch things; let coolies do it." But Hosea was periodically ill, especially during the summer months, and given Nan’s aversion to the Chinese, we might well question how welcome a servant’s assistance would have been in the garden. Although Pakhoi had about five times as many foreign residents as Lungchow, social life showed no measurable improvement.

In short, Nan must have been miserable, and Hosea may not have been much happier. On February 13, 1899, the commissioner wrote to Deputy I.G. Robert Bredon in Peking: "I am sorry you have postponed my leave until the spring of 1900." He added, "I shall ask you to let me off in March. I cannot risk travel in hot weather. Health." Morse need not have worried about an extension of his stay at Pakhoi, however; Hart suddenly changed his plans and decided that Hosea should open the port of Yochow in Hunan province. Hosea dutifully answered the summons, but before leaving Pakhoi, he stated emphatically in a letter to the I.G., dated March 25, 1899, that his French successor must understand clearly that his first allegiance was to China, not to France. Despite his frustrating experiences with local Ch’ing officials, and his wife’s growing dislike of the Chinese people, Morse steadfastly kept China’s interests foremost in mind.
In transferring Morse from Pakhoi to Hankow in Hupei province, with responsibility for opening up nearby Yochow (now Yueh-yang) in Hunan, Hart moved him not only from a marginal area to a central place but also from a French sphere of influence to a British one. It was an extremely ticklish assignment, for in 1899 both the Chinese Empire and the populace in general were in a heightened state of tension. The so-called scramble for concessions of the previous year had left a legacy of hostility toward foreigners in many parts of China—not least Hunan and Hupei. Hunan in particular had a long-standing reputation for ideological and spiritual vigor. "Hunan for the Hunanese" was the slogan of the 1890s, but well before this time the province had resisted foreign penetration. No missionary was permitted to dwell within its borders, and those who "itinerated" ran the risk of being "hustled and maltreated." Morse had to tread with special care under the threatening circumstances.

The Hunan Environment

Hunan played a prominent role in China's domestic affairs throughout the entire latter half of the nineteenth century. During the 1850s and 1860s, for instance, the famous Hunanese scholar-general Tseng Kuo-fan drew heavily on local talent in organizing the military forces that eventually suppressed the Taiping Rebellion. In the 1860s and 1870s one of Tseng’s most distinguished protégés, Tso Tsung-t’ang, also from Hunan, established the Foochow Shipyard and helped quell both the Nien and Muslim uprisings. During the 1880s and 1890s one of the dynasty’s principal modernizers was Chang Chih-tung, who operated for eighteen years as governor-general of Hunan and Hupei. Chang’s establishment
of the Han-Yeh-P’ing coal and iron complex and his setting up of schools and training of a modern army were all in the forefront of the imperial “self-strengthening movement” of the late nineteenth century. After the reformer Li Hung-chang was disgraced in 1895, his protégé, the agile Sheng Hsüan-huai, quickly transferred his allegiance to Chang Chih-tung as his new patron.

Hunan became a major center of reform after 1895. Liang Ch’i-ch’ao established a newspaper in the capital, Changsha, and many other leaders emerged there to undertake projects of modernization. Partly as a backlash, a vigorous conservative movement also existed in Hunan. Some of its leaders sought direct action in defense of Chinese values and ways. In the summer of 1891 the anti-Christian riots at several centers in the Yangtze valley were mainly fomented from Hunan under the leadership of a diehard scholar named Chou Han. He had circulated scatological pamphlets and cartoons suggesting what Catholic priests did with nuns and how nuns made potent foreign medicine from the eyes of Chinese orphans kidnapped for the purpose. By 1899 Hunan had thus become a main focus of the foreign powers’ concern about antiforeignism, both conservative and reformist. (Mao Tse-tung, of course, would eventually emerge from Hunan.)

The opening of Hunan was complicated by domestic rivalries. On May 9, 1898, for example, a riot occurred at the Yangtze River treaty port of Shasi, not far upstream from Yochow. Shasi had been opened in 1896 and had become an outlet for Hunan merchants. The report sent to Governor-general Chang at Wuchang painted this picture: Some Hunan traders were annoyed with the China Merchants’ Company’s steamship line. They expressed themselves both psychologically and physiologically by urinating in front of the company’s Shasi office. When the company guards brutally beat them, the whole Hunan guild took their part, and a wild riot ensued. The China Merchants’ Company premises, the customshouse, the Japanese and American consulates, and some business firms were all burned down. Compensation naturally had to be paid. This incident made the opening of a new treaty port more urgent.

Yochow, with a population of about eighteen thousand, was not itself a great trading center, but it stood at the southernmost bend of the Yangtze River, where Hunan’s major tributary, the Hsiang, enters the Yangtze through the waters of the widely dispersed Tung-t’ing Lake. Located about 120 miles upstream from Hankow, Yochow occupied the strategic spot where waterborne commerce came into and out of the great
rice basket of Hunan province. The adventuresome author Isabella Bird offered a brief description of the place in 1896: “Yo-chow, a fortified monastery on a high promontory, once a place of considerable domination, and Yo-chow Fu, a large city near the junction of Tungting Lake with the Yangtze, are the chief features of the featurelessness.”

But behind Yochow’s nondescript exterior burned powerful passions. An American engineer-surveyor wrote that after the city had been declared a treaty port, he and his colleagues “received word by courier from the Governor of Hu-nan that on no account must we go near Yo-chou, let alone enter it, as ten thousand students were gathered there from all parts of the province trying to pass the examination for the first degree, and that the authorities would not be answerable for the consequences should we be found in their vicinity. . . . I replied to the Governor’s messenger that Yo-chow was a place of so much importance, that a survey of it was necessary.”

Originally the British Legation had planned to open Siangtan, “a large trading mart in the heart of the province” near Changsha; but to do so would have involved a British loan to the Chinese authorities, the interest on which would have come to the British people from the Chinese people. Chang Chih-tung would have none of it. He mobilized his colleague the governor of Hunan (first Ch’en Pao-chen, then Yu Lien-san) and sought help from the Nanking governor-general, Liu Kun-i, as well as Sheng Hsüan-huai at Shanghai and a dozen other allies. As a result, Yochow was substituted “in order to conciliate Hunan opinion.” Morse wrote: “The compromise contented both sides, while it satisfied neither; it was accepted on the one side because it gave an entering wedge, and on the other because for a time it held the intrusive foreigner at arm’s length.”

Two books, both published in 1899, reveal the British perspective on these affairs. One was by Archibald R. Colquhoun, a former colonial administrator and London Times correspondent, who was well acquainted with the Western wisdom on China and with British representatives in the treaty ports. In his China in Transformation he expressed admiration for the brusque and firm approach of H.N. Lay and Sir Harry Parkes. He counseled that the unconscionable evasiveness and willful obscurantism of the Ch’ing government could be dealt with effectively only by force. Talk loudly, carry a big stick, and travel by gunboat—that was his idea.

Another top-drawer observer, Lord Charles Beresford, toured China for three months in late 1898, sent by the Associated Chambers of Commerce in Britain. The Break-Up of China was his report. He saw
everyone who was anybody, and his report reflected the possessive hopes and truculent vexations of the treaty port merchants. At Hankow in early December, Lord Charles had two long interviews with Chang Chih-tung. They mainly discussed how British officers could be used to train Chinese armies without provoking imperialist rivalry. Beresford’s book advocated an open door for trade to prevent foreign spheres of influence from breaking up the empire. He also reported that Chang expressed a fear of popular disturbances because the people somehow “had got it into their heads that they were taxed in order to pay the foreigners.”

At this point rebellion was stirring in many parts of the empire. The targets were in most cases both local foreign establishments and imperial officials seemingly in collusion with the foreign invasion. Worsening economic conditions only exacerbated the tensions. Chinese antiforeign feeling was blowing up to the Boxer Uprising of 1900.

This was the precarious diplomatic and domestic context in which the opening of Hunan to foreign trade came to the top of the Anglo-Ch’ing agenda. Hunan, located as it was in an announced British sphere of influence, had to become accessible pronto. Robert Hart’s hand appears in the idea that the Hunan treaty port to be set up would be the voluntary contribution of China, “self-opened” (tzu-k’ai), as stated in the treaties. Yochow would be the first treaty port in this new category to demonstrate that the modernization of China could now be undertaken by a progressive Chinese Empire. Other “self-opened” places would include Woosung (1898), Santuao (1899), Chinwangtao (1902), Tsinan (1905), and Nanning (1907). A chief motive was to forestall other powers from getting China to open ports where they would have special advantages like those the Russians had acquired at Port Arthur. In short, the Maritime Customs was as usual contributing to the defense of the treaty port system to which it had always been umbilically connected. The fact that imperialism and the Customs Service would in the end outlast the dynasty was becoming evident to many, but it remained only a future possibility.

Although Yochow was not a commercial center, “past its portals flowed nine-tenths of the stream of Hunan traffic.” Most of this traffic did not stop. But the coming of steam opened Hunan to economic development, and it was hoped that Yochow would be the transfer point of goods from large Yangtze steamers to the lighter draft steam towing launches necessary for the area’s shallow lakes and tributaries.

Hart had initially designated his Shasi customs commissioner Neu­mann to prepare the opening of Yochow. But in the Sino-foreign antagonism
engendered by the recent riot, Neumann became anathema to the Chinese local officials who were trying to hold the situation together. On January 8, 1895, Chang Chih-tung explained to the Tsungli Yamen that to open Yochow would require a customs commissioner who was mature and experienced, smart and equable in temperament. After two years' contact with Neumann, however, the Shasi taotai concluded that he was coarse, ill-tempered, and inconsistent. Neumann had, for instance, got drunk and invaded the Manchu garrison's premises, narrowly avoiding a major incident. Moreover, he demanded more compensation for his burned customshouse than the Japanese and Americans did for their consulates. Altogether he seemed to be an unsavory, arrogant, and headstrong character, who saw no special problems at Yochow nor any need for caution there. Chang wrote that if the I.G. sent Neumann to open the port, he (Chang) would not be responsible for the consequences. Exit Neumann.  

Hart wrote, "The Hukwang authorities"—that is, Chang Chih-tung and his subordinates—wanted "an experienced, reasonable, and common-sense man" to open Yochow. "[The] post is too important," he believed, "for any youngster, or faddish person, to be sent." A biographer would like to believe that when a customs commissioner had to be found to enter the Hunan lion's den, the I.G. thought at once, "Send for Morse!" But that was not how it happened. On February 8, 1899, Hart informed E.B. Drew that he would probably be the one to "open Yochow and nurse it through its initial stages." For family reasons, however, Drew went instead to Tientsin. Hart then considered another Customs official, J.E. Schoenicke, for the job before finally deciding on Morse.

The I.G.'s letter of appointment, dated April 13, 1899, offered Hosea a rather unflattering and somewhat incomplete explanation of how events unfolded: "I originally intended Neumann for this Yochow work, and it could be well to get any notes he has made: unfortunately, I can't send him. . . . [He has] irritated the Viceroy and led him to suppose N's temper too unmanageable for such a delicate task as the opening of Yochow (although he is himself one of the best tempered and most agreeable men going!) I then mentioned Schoenicke, but Hoihow work still detains him there, and as the Viceroy is in a hurry, I have fallen back on you. I am sure you will do all the work very well." Hart then gave Morse some practical advice: "go slowly, see everything, be reasonable, avoid flurry or ill-temper, and keep well before your mind the possible developments and requirements of the future." It would be prudent, he continued, "to keep a diary, and illustrate it with pen and ink plans of cities, etc.—with Chinese names at
various points.” He asked Hosea to keep him “well informed of all that goes on and wire when you want anything.” Hart offered staff assistance if required but warned that the men would not be experienced. He closed his letter with the hope that Morse would “enjoy the work,” adding, “P.S. Tell the Viceroy about your Lungchow experiences: they will interest him! Also give him my compliments! RH.”

Settling in at Hankow

Hart had made his brother-in-law, Robert Bredon, deputy I.G. to handle administration at a time when the I.G. himself had to spend two months recuperating at Peitaiho. Morse therefore reported to Bredon on housekeeping matters and to Hart on the diplomatic side. Since Morse was assigned as Hankow commissioner with the special job of moving up to Yochow when opportunity allowed, this required first of all moving with Nan to the commissioner’s house at Hankow. On arrival Morse reported with some consternation that his predecessor, Moorhead, “was here seven years on one [furniture] allowance and naturally at the end had no funds for any renewals or even repairs. . . . In the house there is not one plate—soup, meat, cheese or dessert—and I am getting on with a few kitchen things which luckily I brought on from Pakhoi. I cannot even ask one friend to pot-luck.” For Nan this collapse of the Hankow commissioner’s most elementary housekeeping arrangements no doubt confirmed an opinion she had long held, that life in the Chinese Maritime Customs Service was a form of prolonged camping out. But once settled, Nan might not have had too bad a time, barring illness. After all, Hankow had a large foreign community of about a hundred people. Social life at Hankow therefore must have been a vast improvement over Lungchow and Pakhoi.

Morse’s first letter to Hart from Hankow confirmed that he should address the I.G. and “not the deputy I.G. regarding Yochow business.” The new commissioner then summarized his most recent activities: “I arrived Saturday, your dispatches came Sunday, and I saw the Viceroy [Governor-general Chang Chih-tung] yesterday, Monday.” Chang stood out as one of the Ch’ing dynasty’s great administrators, a conservative reformer whose ideas about China’s mixture of Western and Chinese ways still make sense to many people almost a century later. He was a precocious scholar, a man of impeccable Confucian rectitude, an eloquent moralist, and a smart politician. Since 1885 Chang had served as governor-general successively at Canton, Wuhan, Nanking, and Wuhan again. He had established dozens
of small training schools to produce talent capable of leading in China's military, industrial, agricultural, and intellectual modernization. Fourteen years younger than Li Hung-chang, he was like Li in his utter loyalty and sycophancy toward the Empress Dowager.

The radical reformers of 1898, whose followers inherited the reform leadership, despised both Li and Chang. But by specializing and experimenting in education, Chang would lead the way to abolishing the ancient examination system in 1905. He may become better appreciated as time goes on. Morse wrote of their first encounter:

I expected to see a big burly man with a square head and found a frail looking man with an intellectual face and a long white Confucian beard. He seemed disappointed at my want of white hair and repeated a remark on the mature age of Mr. Moorhead and the help he had given. To this I replied that Mr. Moorhead was a man of ability which I could not hope to rival, but that I had had twenty-five years experience of Customs working and hoped that industry and application would enable me to make up for any natural deficiencies. This seemed to please him. I gave him your compliments as directed, and he inquired after your health. I said I had orders not to assume charge until I had finished work which he would entrust to me. 21

This of course was an auspicious beginning for the customs commissioner, who had a job to do on behalf of Robert Hart within the jurisdiction of one of the chief officials of the Chinese Empire.

Morse's usefulness to the governor-general was immediately demonstrated at their first meeting, when arrangements for the reception of the German kaiser's brother, Prince Heinrich, had to be made. As latecomers to colonial empire in East Asia during the 1890s, the Germans seemed frighteningly pushy and demanding. By 1895 the proportion of German shipping in China's foreign trade had become second only to that of Britain, though actually about one-eighth in volume. Kaiser Wilhelm II wanted to make the area occupied by Germany at Tsingtao, Shantung, into a second Hong Kong. His brother, Prince Heinrich, sailed to China with German troops that landed in May 1898 to garrison the new Shantung leasehold. In September 1899 the prince broke ground for the new German railway that would penetrate from Tsingtao into the Chinese heartland. This was the portentous and formidable figure who now was descending upon the Wuhan cities, confident of the impending breakup of China. 22
Morse’s report to Hart on his first meeting with Chang Chih-tung continued:

First he said he wished me to call in his company on Prince Heinrich and the next day receive his return visit at Wu-ch'ang. He told me the salutes arranged to which I said that what was done at Tientsin and Nanking would be rightly done here: but he was much concerned at the use of the yellow chair provided by the Consul, fearing hooting by street urchins. I said it was the raising of an overt objection that would make the Germans absolutely determined to use yellow. He will send his carriage and a green chair with yellow tassels, leaving it to the Prince to choose either of those or the yellow chair of his own.23

In the end, the use of an honor guard of Ch'ing cavalry obviated the chair question for Prince Heinrich. Nonetheless, Morse had demonstrated to Chang one of the many ways in which Customs officers could help Chinese officials avoid giving offense to the power-hungry imperialists, who were then aiming to carve up the Chinese melon.

According to Morse, the governor-general “had very little to say about Yochow.” He merely noted that the taotai would “transfer his seat to Yochow ... and be Superintendent [of Customs]” and that “the procedure and regulations adopted for Woosung would be applied to Yochow.” Chang also promised to supply Morse with a map and copies of all relevant documents. Hosea, for his part, “thought it better to wait until I had seen the Taotai at Yochow before going into much detail, but I stated as a general principle that it would be well for the Taotai and Commissioner to act in conjunction for the municipality as for the Customs and the more thoroughly this were done the less likely foreign powers would be to demand exclusive concessions. He spoke of [local Chinese] hostility and said the stupid people might make trouble but that gentry and merchants all call for the opening of the port.”24

After telling Hart that he had wired for the Woosung, Hangchow, and Soochow regulations and had asked Neumann and Howard for their notes on Yochow and Soochow, respectively, Morse went on to stress that the location of the railway station at Yochow was a matter of critical importance. As had been the case at Lungchow, “of the two sites possible for steamers, one only may be possible for the railway.” Thus, logistical considerations might “absolutely determine the position of the settlement.” In closing he offered reassurance to his boss in Peking: “I shall feel my way, say what ought to be done, impress on them my reasons, and leave the
responsibility on the Taotai—always with reference to the Viceroy in reserve.” Meanwhile, as he waited for the Yochow arrangements to develop, Morse negotiated with the Hankow British Municipal Council in the British Concession to procure a well-situated building for the Customs at Hankow.25

Setting Up the New Port

In arranging for the establishment of a treaty port at Yochow, Morse had two major areas of concern, which he attempted to differentiate. One was creating the port itself; the other was promoting trade—in particular gaining acceptance for the shipping and new tariff regulations. As to the first, the site selected had to be on high ground, since most of the land on both sides of the Hsiang was subject to flooding during much of the year. The village of Ch’eng-lin, almost at the mouth of the Hsiang River and about five miles below the Yochow prefectural city, provided the best alternative. Furthermore, since this river was also the outlet for the vast Tung-t’ing Lake, the settlement would be at a choke point for controlling all river traffic, not only from Hunan but also from the south. Only here, Morse explained, “were found together the essential conditions of space for godowns and houses, sheltered anchorage, and a fair-sized creek giving a refuge for cargo boats.”26

Along the shoreline of the village the site was surveyed for the building of a bund and a main street with lots that could be leased to foreign establishments. In the middle of the proposed bund, an area was assigned for the construction of a customshouse and staff quarters for the outdoor staff: “The land is high, fifteen to twenty feet above the bund, but terracing will make it as suitable as if it were on the level. For Commissioner’s house and Indoor Staff quarters we have a piece of ground on low hills to the north of the Liu-king temple, some fifty feet above the ground level. Both sites should be airy and healthy.”27 Morse noted that since foreigners were not allowed to live in temples in Hunan, and since Ch’eng-lin had only two thousand people, initially the sole rental house available had to be for the commissioner, with room for two members of the indoor staff. The outdoor staff were temporarily assigned to live on two houseboats.28 A little later he managed to rent houses for them.

Land and municipal regulations provided the constitutional underpinning for the Ch’eng-lin settlement. Morse described the initial arrangements: “The Chinese government expropriated the land required for an
Morse proposed this plan to meet the strong objection of the Hunan gentry to any appearance of alienating their land either by sale or long lease to foreigners. This proposal managed to conciliate their opposition, which could otherwise have been overcome only by pressure from Peking. Morse believed that foreign merchants did not care whether they had to pay ground rent annually or the capitalized equivalent in cash on entering into possession. The advantage to this arrangement was that it prevented the demand for outright foreign concessions that the Hunanese would never have accepted. Leases would be for thirty years and could be renewed for another thirty years, but after sixty years they would be canceled and the property returned to China. The removal of graves, which had been a great sticking point in other negotiations, was solved because Cheng-lin had none. These arrangements finally settled the land regulation issue, which allowed the port to open.\textsuperscript{30}

Morse also had to sort out the municipal regulations for the Yo-chow–Cheng-lin municipality, where foreigners would lease land and set up business enterprises. These regulations "naturally divided into three heads."\textsuperscript{31} The first related to police. There were memoranda on the organization of the Chinese police force, on relations between the police and local authorities, on police regulations, and on the standing orders of the Ch’eng-lin police force. The taotai or another Chinese official would be in charge, but he was to employ a foreign police chief chosen by the commissioner.\textsuperscript{32} (Chang Chih-tung had already agreed with Morse on the need for a foreign chief.) Although the police would be officially under Ch’ing control, the chief was actually subject to the advice of the commissioner, and the allowance for support of the force was automatically sent monthly by the taotai to the commissioner, who then paid out the funds necessary for expenses.

Morse worked fast. By the time the municipal regulations had been set up, the foreign superintendent of police had already been nominated by
the commissioner and "detached by the Inspector General." He was to be paid $250 a month, a substantial sum, and he arrived on September 17, 1899.

Morse also worked carefully. He advised, for example, that the activity of the tribunal designed to handle merchant cases according to the second municipal regulation "was ti-fang-kuan [local official] business and the Commissioner should interfere as little as possible but should be a party to sending any cases to the Hsien [county magistrate]." Morse counseled similar detachment in the realm of public works. In all such matters, he wrote, "the Commissioner could give useful advice but should not exercise controlling power since much of the work would of course be done by soldiers." In offering these opinions Morse displayed both sensitivity and shrewdness. A great deal of this apparent abstention was velvet on the glove of the foreign commissioner’s actual control. It saved Chinese face, a crucial consideration.

The opening of Hunan required establishing the postal service. Morse corresponded with the head of the Imperial Post Office that in 1896 had been set up from the Customs Post in order to organize service for the province. The post office was run by Customs Service representatives, with jurisdiction only over the immediate port district in which the customshouse was located. Morse therefore requested not only a main Hunan office for Ch’eng-lin, with a branch in Yochow, but also three subordinate offices at Changsha, Changteh, and Siangtan, all in Chinese hands. It was still politic to secure the services of men who had been in the old postal system of private "letter hongs" and who therefore knew the routes and problems of delivery; but the Customs staff handled administration in order to maintain probity and efficiency. This was another instance of balancing Chinese and foreign needs.

In addition to land and municipal regulations and the post office, the commissioner’s other major area of duty was trade, including the shipping and tariff regulations by which it was conducted. In this realm Morse proved to be an especially valuable adviser to Chang Chih-tung; for despite the latter’s long experience in educational, military, and industrial reforms, he was remarkably unversed in China’s foreign trade and the treaty system administered by the Customs establishment.

One key issue, which Morse had addressed at Taiwan and in South China, was the relationship between the treaty port system and the likin tax. The new Inland Steam Navigation Rules, promulgated in September 1898, had given foreign-flag steamers the same rights as Chinese-owned steamers to compete with the inland carrying trade by junk and sampan.
Ships under the jurisdiction of these rules were obliged to stop at likin stations, while ordinary river traffic did not have to stop. The port, including the area for anchorage and the smaller area for discharge of cargo, was a likin-free zone, which worried the Hunanese. Since there was a likin station just outside these limits, Morse pointed out that ships paid anyway at this barrier. The adjustments between the collection of customs and likin revenues did not come easily, but the will of the Customs prevailed. Morse told Bredon later that the best system would be to eliminate likin entirely, but as it turned out this could not be done for decades. After 1901 the collection of likin came to be handled by the Customs on an agreed basis in order to secure funds for the Boxer indemnity. 39

On June 16, 1899, Governor-general Chang asked Morse to come to his yamen for a discussion. Naturally they talked first of local likin. Morse then “spoke without much interruption” about matters such as “the recent Foochow and Shanghai likin decisions.” He also gave Chang some worthwhile advice on the handling of cargo and the regulation of the timber trade. He even provided a detailed comparative analysis of the Chinese and Indian tea industries, pointing out that “Chinese tea is doomed unless 1. new trees are planted, 2. old trees are pruned, and 3. the soil is greatly enriched as vegetable gardens are.”40

A distinctive feature of Morse’s approach to the opening of Yochow was his decision to stay in the background. Thus he refused to go with the taotai to see the governor-general at Changsha on the grounds that the presence of a foreigner might incite opposition. Morse’s program for Customs action was based on the firm principle that Chinese officials must make their own decisions and arrangements, letting the Customs do its proper work but not letting it exceed its normal limits.41 In theory that was easy. In practice the dilatoriness and excuses of officials could be frustrating. For example, at one point the Ch’ing authorities kept Morse cooling his heels in Hankow for forty-five days. He curbed his impatience by reading at the club and even holding a June garden party.42

Hart, knowing only too well the troubles Morse had experienced with the CMSN Company, when he had appeared to move precipitately without sufficient involvement of his Chinese colleagues, strongly supported his laid-back approach to the Yochow situation. On October 16, 1899, Hart wrote: “I have received your diary down to the 3rd Oct., and thank you for sending it so regularly: it will be an interesting document to bind and possess for future reference as a record of travail and the birth of Yochow. . . . I do not propose to criticise or suggest, but my experience is in favour of
Yochow

avoiding being too ‘previous,’ and letting the nebulous twist and writhe until it itself takes form and shape suited to surroundings and circumstances.”

He went on to say:

don’t worry if the Taotai & Co. don’t fall in with all your views in advance, and . . . hop from stepping stone to stepping stone across the new floods of occidentalism: they may splash and fall in, but they do not get drowned, and perhaps in the end it will be better for them to thus sound the depths than to be carried over softly on your shoulders at the start. . . . [They] always suspect hidden motives in the advice we give in these new matters, and in the end it is best to let them feel for themselves when they insist on a false start.

This strategy had special merit considering Hunan’s distinctive character. Many years later Morse described the problems he faced:

The province of Hunan, in which Yochow is situated, had for forty years dominated the empire. Its men had saved the dynasty from being overwhelmed by the Taiping rebellion, and had not allowed the court or the imperial ministers to forget their obligations; and for three-fourths of the period its soldiers had furnished the fighting point to China’s military spear. After the Province was over-run by the rebels and while the imperial authority was in abeyance, the government was administered and the taxes collected by local committees of the gentry; and, with the restoration of imperial authority, the system was continued and gave to every magistrate and every taxcollector, aliens all, a local consulting committee, whose advice they could not refuse to accept.

Further, he observed,

Even the central provincial administration, alien to the province, dared not oppose the considered opinion of the gentry, strengthened by the support of the Hunanese officials holding office in Peking and in every province, and of the retired officials who had returned with their large fortunes to their Hunan homes. As a result the administration was more efficient and less corrupt than in any other province in China; the likin collection was more simplified and less burdensome; and the difference between what the people paid and the treasury received did not reach such large dimensions. With, and largely because of this excellence of administration, the province had retained all of the old hostility to foreigners.
Despite the strength of such antiforeignism and periodic official intransigence, Morse persevered. In his first six months he conferred repeatedly with the governor and his representatives, as well as with officials from various other locations, with delegations of Hunanese gentry, and with such merchants as he could meet. His careful inclusion of all parties involved paid off. The final documents establishing the port were reviewed and confirmed at a meeting between himself, the taotai (who was head of the Board of Foreign Affairs at the provincial capital of Changsha), the taotai of Yochow (who would be superintendent of customs), the Yochow prefect, and two likin officials. In this way H.B. Morse, as a Chinese official himself, was able to provide leadership in organizing a treaty port settlement on the lines of earlier ports, meeting foreign needs and yet respecting Hunanese fears and concerns.

The regulations he had so patiently established enabled the foreign community to control the local situation and protect its interests, and the foreign consuls to preserve the extraterritorial rights of their nationals. For example, taxation in the community would be under the control of a commission of three: first the taotai and commissioner considered as one; second, the consuls; and third, a delegate from the land renters. This commission would operate in English and consist, in fact, of foreigners, with a foreigner employed as chief of police in the settlement to maintain law and order through a staff of constables, who, according to the regulations, would act very much like British bobbies, unfailingly watchful, helpful, and incorrupt. There was no question that the foreign police chief would control the situation insofar as paper regulations could achieve that end.

Having taken seven months to organize the port, Commissioner Morse’s first official dispatch to Bredon announced the opening of the Yochow Customshouse. The ceremony, held at the customshouse at 2:30 P.M. on November 13, 1899, was in the Chinese style:

the Taotai was waiting for me, and as my chair passed in, with Castle carrying the seal, the Taotai burned paper and prostrated himself before the altar, broke the flag at masthead and gave three guns. Then his proclamation was put at gate, a crier called the Customs opened, and six men presented mock applications for goods . . . my seal then opened, I sealed my notification; permits were initialed by Taotai and myself, stamped with Commissioner’s seal and given to applicants together with tablets of silver beaten very thin. After
christening the offices, we adjourned to meet again at dinner. . . .
The delegate sent to arrange the opening was specially guarded
against the happening of untoward accidents, and had behind him
the active support of the Peking administration and of the Viceroy
at Wuchang, Chang Chih-tung; but the chief part of his mission was
to convince the officials and people of Hunan that the proposed
opening would not be an injury, and to meet their objections and
fears in so far as it would not defeat the intention of the govern-
ment.\textsuperscript{47}

In his 1899 Customs annual report Morse emphasized that the
notorious antiforeignism of the Hunanese had diminished considerably:

For a third of a century Hunan had steadily resisted the entering of
the wedge which should open up her resources and her commerce to
foreign enterprise; the wedge has now been admitted, and, while the
cry is still, “Hunan for the Hunanese,” there are distinct evidences that
the concession has been granted in no grudging spirit. This, too, is not
solely a change of attitude on the part of the officials. For years past
the people could have no intercourse with foreigners; and now during
the current year the testimony of foreign officials, missionaries, and
merchants alike shows the friendly attitude of the people of Yochow;
while, one . . . who has made Hunan his study for a quarter of a century
has publicly recorded his conviction that a distinct change has come
over the spirit of the Hunanese in general, but he adds his belief that
they must be treated as men.\textsuperscript{48}

Plainly Morse’s diplomatic skills had improved since the debacle
with the CMSN Company fifteen years earlier.\textsuperscript{49} Of course it was also a
different situation: at Yochow he was working in accordance with the
rules of extraterritoriality and Customs regulations, not initiating a radic-
ally new venture like the Chungking route with its own obscure internal
logic. In Yochow he worked successfully with the Chinese; officials such
as Chang Chih-tung took him seriously, unlike the small fry at Lungchow,
who were too harassed by the French to pay him much heed, or the
bureaucrats of Pakhoi, notable primarily for their absence. If Morse did
not always feel patient, he nonetheless had learned to act patiently. He
grasped the main requirements and put them into action with meticulous
care for detail. This achievement is especially remarkable in view of his
physical condition.
Health

During most of his year at Yochow, Morse did not feel well, but his health had deteriorated badly by the autumn of 1899. If the diagnosis of schistosomiasis is indeed correct, then, except for Lungchow, Morse was not in appropriate places. The snails that carry the schistosomiasis parasite thrive in relatively still, fresh water in warm to tropical climates. Pakhoi was very far south and on an estuary and river. Yochow, with the Tung-t’ing Lake nearby, probably contained the stagnant water in which the disease-bearers flourished.

By September 1899, on grounds of poor health, Morse requested early leave from the I.G., claiming that he and Nan could only remain through the winter even in Hankow. In response, Hart indicated on October 16: “I hope to let you off in November, but I have not decided who is to replace you . . . for the demands for men are just now perplexing, seeing that the Likin chiefs . . . are all breaking down and want rest.” Morse was obviously not alone in his misery, but this was no solace. On November 17, just after the opening at Yochow, he wrote to Bredon, “I hope to hear of my relief coming here soon as I am feeling done up.”

On December 2 he complained, “I’m sorry to learn nothing of appointment of my successor; I am just dragging through—I put in no more than four hours of work a day except for seeing Chinese, and the rest of the time I spend mainly lying down. More I cannot do, and in the interest of the service you ought to replace me here, even if you do not let me start for home.”

Six days later, after receiving “no word of my relief,” Morse reported to Bredon: “I am thankful to say that there is no Customs work yet, no steamers and no cargo. After a couple of hours at it I have to go and lie down, unable even to write a letter, and my few fit hours have this week been taken up with municipal work.” Yet despite his debilitating illness, Morse anticipated pressure from the local taotai to have him stay on at Yochow:

I am not sure that he will not make another try to have me kept here. For a month he has been sending daily to inquire of my health [from my staff]: and when he left he again asked if I could not stay another two or three months. I told him he saw me attending to my necessary work, but . . . not stretched on my long chair; that since my last attack in October I had every day suffered pain, some days worse some days better, and that I did not dare . . . let March catch me this side of Suez (the northern Pacific is impossible for me).
The governor of Hunan also expressed concern for Morse’s condition. On January 9, 1900, Hosea reported to Francis E. Taylor, statistical secretary at Shanghai, that “the Futai inquired after my health, and asked . . . if I did not take medicine. I told him I had to take drugs almost every day, but they were for my symptoms, and that nothing but a change of air would eradicate the disease, the seeds of which had been planted in Formosa.”

What Morse needed was a change of water, not air. Unfortunately no one knew to tell him this, and meanwhile his condition continued to deteriorate. On January 10 he wrote to Mr. Liang, secretary and interpreter for Chang Chih-tung: “If my Yochow successor does not arrive I shall very soon have to go to Hankow to see the doctor, as I am worse rather than better.” About a week later he told his colleague Taylor, “I am still wearily waiting for some word of an appointment here, but I at least now have the assurance that I shall not have to take over at Hankow.” On February 8, upon receiving news that he would be relieved of duty in early March, Morse tried to book passage from Yochow—only to find that steamships were already “very fully engaged.” In desperation he reported to Bredon: “I must get away [even] if I have to go steerage. I am sorry I am not fit for duty but . . . after two weeks rest I am not.”

Finally Morse went on a two-year leave as of April 1, 1900. His health remained so poor that he received an extension of eight months’ leave, to the end of November 1902. Sadly, he had little to show for all the suffering. His heroic effort to open Yochow proved not only unnecessary but perhaps even counterproductive. Commerce in and out of Hunan passed by on the Hsiang River on its way to the Yangtze and Hankow, but between Hankow and Changsha there was little necessity for stopping at the Yochow customs station. The foreign legations meanwhile expected that Changsha would quickly be opened to foreign trade (it happened in 1904) and were therefore not much interested in Yochow or inland navigation. In 1901, in the midst of Morse’s leave, the British Foreign Office informed the Treasury that “as a treaty port Yochow hampered foreign trade rather than facilitated it, and this obscurest of consulates disappeared.” In the end, Morse’s establishment of Yochow as a treaty port was an exercise in geopolitics rather than commerce.
According to Morse's 1909 report to his Harvard class, he and Nan spent their leave time in the United States and Europe without much improvement in health. Hosea attended a reunion at Harvard and went on to England and Switzerland. During this leave, the Morses became reacquainted with his niece Janet, now twelve, and her brother, Bertie, nine, whom they had not seen for four years. It is time now to tell their story more fully.

A Niece and Nephew but No Family

The father of Janet and Bertie, Albert ("Bert") Morse, was nine years younger than Hosea and thus the youngest sibling of the family. Born three months before the family left Halifax, Nova Scotia, Albert grew up mostly in Medford, Massachusetts, and attended school there. At the age of fifteen he moved to Omaha with his parents. Eight years later, on April 10, 1887, while living in Ellsworth County, Kansas, he married Sylvia Lundgren of Brookville. On January 4, 1888, Sylvia gave birth to a daughter, originally christened Minnie Dexter Morse. A son, Albert R. ("Bertie") Morse, was born on April 15, 1891. When Sylvia died on May 20, 1893, at the age of twenty-two, a family crisis ensued. Because Minnie and Bertie's father was out of work in the depression of 1893, his parents, Albert and Mercy Morse, undertook responsibility for his daughter and son. The grandfather wrote to Hosea that Sylvia "died happy knowing that your mother would have the children.”

Hosea and Nan had been in Tamsui for more than a year when they received this sad news. After twelve years of marriage they had no children,
and so they offered to rear Janet and Bertie as surrogate parents. Hosea's father replied to him on August 16, 1893,

I think it a very good thing what you propose for the children and I hope Bert will think it best for the children. Of course it will be very hard for him to part with them but one thing is sure, we are not able to take care of them.—but still we must even if we are sick and should divide our loaf with them. Bert has not had one day's work for two months and he writes he may get sum [sic] in ten days. He has spent all he had so now he is in a bad fix—this whole country is in a bad shape.4

On August 24 the grandfather wrote again to Hosea:

My dear son. We have decided that the children shall go to you and Annie. Also Bert has fully made his mind up that your offer is so good and kind that for the children's sake that his must go out of sight. I shall see that the proper paper is made for you but you must give one as well. In this paper you can put about the reservation that you are to be their uncle and aunt, etc., and it's right for you to have just what you want, then no second wife can claim them to do housework, etc.5

Both of the children, he added, were "pretty and smart and active—even now we shall miss them."6

The grandmother, Mercy Morse, planned to leave Omaha on September 10, stay three days with a cousin, J.S. Morse in Seattle, and then take a steamer leaving Vancouver on the eighteenth, per Hosea's instructions. She assumed that her son would meet her and the children at Shanghai on October 7. Hosea's father wrote: "We expected Bert over from Chicago today so that I could enclose the adoption paper but he has not come. When he comes he may as well stay here for awhile as to go back and pay room rent and board for there is no work—it is terrible to think of the hundreds of thousands now out of work and getting fed from the soup houses both east and west in the summertime. Do not know what it will be in the winter."7 When he sent the letter, he did enclose the adoption form filled out by his son Albert.

At the China end of this transaction we have only a letter from Nan Spinney, at Amoy, to her mother, dated October 3, 1893:

I had an astounding letter from Mrs. Morse today. Mr. Morse's brother's wife has died leaving two little children and the Morses are
adopting them. The grandmother is or soon will be—in Shanghai bringing the little creatures out to their new home. How happy little Mrs. Morse will be—for if there's one thing she likes it is fussing over and taking care of people and now she can do it to her heart's content. She wrote me about it just as she was leaving to meet them in Shanghai. She had to go up alone as her husband could not get away just now from Tamsui.

About three weeks later, on October 26, in the presence of the British consul, W.S. Ayrton, at Tamsui, H.B. Morse signed a statement to the effect that Minnie Dexter Morse "will henceforth be known by the name of Janet Morse" and that "Albert Roy Morse will henceforth be known by the name of Albert Park Morse." Janet later told her daughter that Nan did not approve of "Minnie" as a name and gave her the choice of Janet or Ruth. She sensed her aunt preferred the second choice, so she deliberately selected Janet.

Within a few months Hosea felt it necessary to clarify the legal situation. He was evidently underimpressed with his youngest brother's approach to life and wanted to ensure that his own estate, if he should die, would be totally at Nan's disposal. On February 24, 1894, H.B. Morse wrote to his father, refusing to adopt the children legally or to give them any rights in his estate. "I am not going to allow Bert to lightly cast the children off by my adopting them out and out. . . . I am not going to give any encouragement to the belief that someone is always going to be ready to support Bert."

It is difficult to know why Hosea suddenly took such a rigid stance toward the children. A few months earlier, after all, he and Nan had been willing—indeed anxious, if we can credit Nan Spinney's testimony—to adopt Janet and Bertie, although not unconditionally. Perhaps as time wore on Hosea grew increasingly resentful of his brother's apparent irresponsibility. He may also have thought that his own poor health, together with the responsibility of raising two children, would weigh too heavily on Nan. A third possibility is that Nan decided in the end that she did not want to adopt children who were not hers by birth. Much later, Nan's niece Anne Welsford reported: "I feel sure that Aunt Nan would have liked to have a son. She preferred Bertie to Janet, but she did not regard either of them as a substitute for children of her own. She had a very poor opinion of their father and I suppose that prejudiced her against them."

Janet's tape-recorded reminiscences of 1981-82, although disjointed with regard to chronology, confirm that Nan "favored" Bertie, whom Janet described as a "goody-goody." Indeed, Janet went so far as to say that "Auntie didn't like me at all. She didn't want any children . . . [and] wasn't
a loving person." At another point Janet observed that Nan "wasn’t so motherly as . . . [Uncle Hos] was fatherly." Still, she acknowledged that Mrs. Morse "did her duty" as a foster parent. Nan instructed her niece not only in elementary schoolwork but also in sewing, dressmaking, and other feminine accomplishments. She also shared with Janet her interest in botany and the world of nature at Tamsui.

Nan may have been too hard on Janet, however. Anne Welsford, recalling a later time, tells us:

My aunt should have been a school mistress. Her natural response to a child was to discipline and teach it. She had some good ideas, for instance she told me that there was a story behind every picture in the house and she showed me a picture of a badger and said: "Your great grandmother was a Badger." She painted a delightful little book about kittens for me and went to a great deal of trouble cutting out a frieze of roses for my bedroom. But she spoilt it all by severity. I was terrified of her.

In a letter to John Fairbank of August 2, 1988, Nan’s cousin, Mrs. Lindsay Pancoast Zimmerman, wrote that Nan "was very loyal and warm hearted to those she cared for but if I’d been a child she would have intimidated me as she must have Anne Welsford." She continued on October 3, 1988:

You might wonder how it came about that Nan accepted me when I never showed any regard for her. My Mother’s explanation was that Nan only cared for people who stood up to her and didn’t let her get away with being a tyrant. The few days we were in Camberley in 1924 also illustrates Nan’s disposition—My Mother was not strong and had to be careful not to overdo.—My father was a gentle person and Hosea helpless in the face of Nan’s determination to walk miles or be dragged hither and yon. I couldn’t have my Mother worn to a frazzle so I had many a battle with Cousin Nan.

Such testimony, all offered in the 1980s, may not reflect circumstances in the 1890s. It is possible, for example, that the difficulties Nan endured in Lungchow and Pakhoi, and especially the trauma she suffered in Shanghai during 1905 (see chapter 12), hardened her in ways that were not apparent in 1893. By the same token, it is possible that Hosea had a hard edge in China that he lost in later years. Those who knew him after his retirement from the Customs Service invariably described him as a man capable of warmth, generosity, and genuine affection.
In any case, the adoption issue raises intriguing questions about the Morse family history. Why, for example, were Hosea’s other two brothers not asked to care for their niece and nephew? They were living in the United States and yet were not even mentioned in their father’s letters to Hosea. One might also wonder why Morse failed to meet his mother after she had brought the children all the way to Shanghai. As far as we know, he did not even invite her to return to Taiwan with Nan for a visit in Tamsui. Presumably this situation created the final rupture between Morse and his nuclear family; and perhaps he wanted it that way. But whether by accident or design, this disconnection from his beginnings left Morse inordinately dependent on Nan and her family, a situation that may well have had decisive implications for their later relationship.

For about a year Janet and Bertie stayed with the Morses at Tamsui. Then in early 1895, with the Japanese threatening Taiwan, Nan took the children to Amoy. From there they went to Shanghai, where all four Morses stayed for eleven months. During the time Hosea was commissioner at Pakhoi, Lungchow, and Hankow, from June 1, 1896, until April 1, 1900, Janet and Bertie resided in England. There Nan’s youngest sister, Alice Proctor (Auntie Lal), took them in and became a friend and close supporter of Janet’s. At eight years of age Janet was sent to St. Catharine’s boarding school in Bramley, Surrey.\(^19\)

When the Morses arrived in England on leave in 1900, they picked up Janet, but not Bertie, at Lal’s and went to Switzerland to try to regain their health. Bertie apparently remained at a local boys’ school for a few years, before being shipped off to a sheep farm in New Zealand. The Morses placed Janet in Madame Chaboux’s secretarial school in Geneva, where, from the ages of twelve to fourteen, she enjoyed the beauty of the lake, outings to the Castle of Chillon, and the companionship of classmates. Her French became quite good, she gained a general appreciation of the arts, and she began to play the piano. She also received secretarial training. Her school years were completed when she returned to stay with her aunt and uncle in China during Hosea’s last two assignments there. From Geneva in 1903 Janet rejoined the Morses at Canton on the island of Shameen, while Bertie seems to have slipped entirely from their world.\(^20\)

**Return to China**

By leaving China in the spring of 1900, Hosea and Nan had avoided the great crisis that gripped the whole foreign establishment in the summer of
1900 when the Boxer Uprising led to the siege of the Peking legations
(including the I.G.'s residence and office). Hart, who lost nearly all of his
personal possessions as a result of the fighting and chaos in Peking, wrote
to Morse on June 24, 1901:

Negotiation has proceeded very slowly here, the difficulty of getting
eleven powers to adopt a unanimous view being both natural and
enormous. There has been no delay on the Chinese side, but that also
was to be expected for China has merely to accept what the others order
and in fact is too anxious to close the business to risk any prolongation
of uncertainty in discussion. I have been of some use I think, but that
will be recognised more easily later than now. My health has held out
wonderfully so far; some recent symptoms, however, force me to think
I may be overdoing it, and a collapse wd. not surprise me. The really
important matter is the indemnity and the arrangements it will neces­
sitate, and after that will come the revision of commercial treaties, &c.
I fancy I can see the first through, but I am doubtful about the second.
The loss of all my things, burned by the Boxers or looted by the mob,
weighs heavily on me, and I feel it more acutely every day; a little
foresight and a little energy would have saved much, but we thought
"the end of the world" was come for us and events followed each other
too quickly to admit of action.21

Hart’s letter came in response to Morse’s of May 6, requesting an
eight-month extension of his leave to November 30, 1902, on grounds of
continued poor health. The I.G., himself recuperating from the traumatic
siege, was immediately sympathetic: “I am glad yours of the 6 May reports
some signs of improvement and I trust a longer stay at home will enable you
to return in as good health as ever. Had I known you were so near a nervous
breakdown I should not have kept you after Formosa, but as matters stood,
you were just the man for Lungchow and Yochow. The official application
has not yet come to me from Bredon, but I shall tell him to let you have
extension and pay as applied for, seeing you had a trying time and worked
well.”22

Hart welcomed Morse enthusiastically on his arrival back in Shang­
hai, where, for the month of December 1902, Morse held the nominal post
of officiating chief secretary in the inspectorate general. The I.G. had no
good news to report about his next assignment, however. The only available
position for a man of Morse’s rank and experience was as commissioner at
the godforsaken port of Pakhoi. “I do not want to put or keep you where
[your] health wd. be damaged,” Hart insisted; but he added in true bureau­
cratic fashion that “a man returned from leave is [generally] considered fit
for any place.” The I.G. promised that he would transfer Morse “as soon as
possible” but pointed out that several senior officials in the Customs Service
were all “more or less ailing & wish to get away from the south. . . . It is no
easy job to attend to all claims and health is not the only point—though very
important for the individual—that the chief has to think about.” Hart ended
his letter with vague encouragement: “All I can say is that your wishes will
not be forgotten and what can be done will be done.”

In January 1903 the Morses returned reluctantly to Pakhoi. After
two previous tours of duty, the Morses still found little to love there and not
much to do for three months, a period rather like a consultancy. The port
had gone downhill, and trade was minimal. The surrounding small ports
received most of the revenue, which was in any case so slight that the
commissioner did not think the activity in the Pakhoi area warranted paying
foreign staff. The imposition of new and burdensome local taxes fanned the
fires of Chinese discontent, while feuding between missionaries and consuls
over the quality of converts complicated the lives of foreigners in the area.
Brigandage and piracy were rife, and Chinese officials could claim no
control over the situation. At one point the French consul, after informing
Ch’ing officials that he would invoke “French armed protection” in the event
of a public disturbance, confided to Morse that “what he feared most was
that the Pakhoi people would welcome foreign intervention and would
intentionally make it necessary.”

This final brief sojourn in Pakhoi was, if anything, drearier than the
previous two. Adding to the disagreeableness, Morse was quite unwell. He
reported to Hart that he had suffered a great deal of pain during his last
month there. The situation brightened considerably, however, when Hosea
took over as commissioner at Canton and Janet rejoined her aunt and uncle
there. Canton was one of the original five treaty ports “opened” by the Treaty
of Nanking in 1842. By 1903 it was not nearly as important as Shanghai,
but it remained a relatively exciting city to live in and a center of political
activity.

Morse’s semiofficial letters, which reflect accurately the commis­sioner’s day-to-day concerns, provided the I.G. with a wealth of information
on local affairs. Morse began his time at Canton by calling on the British,
French, and Portuguese consuls. He reported a “frank talk” with the rough­
mannered but capable British representative, J. Scot, and a less than satis­
factory conversation with the American consul, McWade, who seemed to
be nothing more than a "vulgar politician." McWade expressed much concern about the area of his jurisdiction, which he felt "extended over a great part of South China," and he wanted to claim a separate American concession at Canton on the south bank of the river. Morse reminded McWade that in any concession area, land had to be "neutralized for the Customs" if one wished for Customs facilities; and the Portuguese consul pointed out that the Americans should have established their own settlement in 1858 when England and France took over Shameen Island "as trustees for all." This idea, Morse suggested to Hart, "may be a point d'appui to oppose (at Peking) a demand for an American concession."  

At Canton Morse had considerable contact with local Ch'ing officials, all now drawn inescapably into the fin de siècle world of imperialist subjugation. After the thorough humbling of the Ch'ing dynasty in the Boxer Protocol of 1901, its days seemed to be numbered. Heaven's mandate had begun to slip inexorably away. No Ch'ing official was in a mood to contend with the foreign consuls or even with the foreigners in the Customs. In general they interposed few obstructions and were cooperative. Thus, for example, in a letter to Hart dated March 26, 1903, Morse described the governor as cordial, the Banner commander-in-chief as "very nice," and the hoppo (superintendent of trade at Canton) as "an improvement on my former impression." Most Chinese bureaucrats, Morse wrote, were at this point worried primarily about holding on to their posts.  

The Boxer Protocol altered the Chinese administrative landscape in profound ways, not only by emasculating Ch'ing officials but also by placing the Customs more fully in charge of China's revenues. Among its various onerous provisions was the stipulation that Hart's inspectorate general would take over the native Chinese customs within a fifty-li (about a seventeen-mile) radius of all open ports, in order to assure payment of the huge Boxer indemnity.  

This situation created a bureaucratic nightmare. For Hart and his foreign officials, including Morse, the task was to assume control over a large number of "widely scattered, decentralised, and semi-independent trade-taxing establishments, each with its own tariffs, and each with its own excessive staff, every man of whom had his own vested interests to defend." Although Hart from the outset had told his foreign officials to acquire as much information about the native system as possible, the data were often misleading or simply unavailable. Commissioner Merrill at Wuhu reported, for example, that "[t]he 389 names which appear on the list of the Native Customs establishment here, comprise not more than one half
the real number of persons who depend upon the M.C. [a garble for Native Customs?] squeezes for support, most of whom do no work." When the tao-tai at Canton asked Morse how the new system of collection compared with the old one, Morse replied that he could not say, for there was no record of the native customs for earlier times.

Naturally enough, Ch'ing officials fretted over how to support superfluous members of the old customs system under the new arrangements. Morse recounted a conversation with the "permanent undersecretary" of the hoppo, Mr. Shen, who spoke "feelingly of his loss of patronage from the transfer of Native Customs and of the number of mouths he had to 'feed' and so asked for help." As the "t'ung shang [foreign trade] face" of Sino-Western administration at the treaty port, the commissioner, as Morse described the job, had to keep Shen and his superiors from "running into international complications." This was tough duty, for although the hoppo appeared to be friendly enough, he was both ignorant and corrupt. To make matters worse, during much of Morse's time at Canton the governor-general was not even in the city. Rather, he was in neighboring Kwangsi province (also part of his jurisdiction) trying to suppress piracy at the expense of Canton's military security and financial well-being. Morse did much of his official business with the viceroy's secretary, who seems to have been the chief operator in that office.

In the absence of effective local leadership on the part of the Ch'ing authorities, Triad rebels became active in the North River area, while piracy flourished. At one point the governor-general's secretary asked Morse to put soldiers on steam launches to thwart the pirates, but Morse refused. His point was that a plan had to be worked out with definite responsibility assigned to the Chinese authorities, after which the Customs Service could take action. When the viceroy reappeared in Canton and called on Morse, the latter made it clear that Ch'ing soldiers on steam launches could not undertake the suppression of piracy, nor would armed coolies on passenger boats be allowed to do so. Morse's position was that only appropriately constituted Chinese functionaries should pursue pirates to their villages of origin. He pointed out firmly that the Customs did not want to undertake police work but would be willing to follow any reasonable plan developed by the governor-general.

Morse had several other trade-related problems to contend with at Canton. One was how to get the harbor regulations drawn up in such a way as to be accepted by the Chinese, the merchants and their consuls, and the Customs. Here he favored simplicity and followed the Shanghai model.
Morse also had to oversee the bunding of the north side of the harbor and river at Canton, all of which required a careful and extensive survey. A further problem was how to remove the four sets of barriers that had been set up for military defense at the entrance to the river. Local gentry preferred to see the barriers left standing, but Morse believed on the basis of his experience in Hunan that they could be persuaded to change their minds.38

Morse enjoyed considerable success in these and other such negotiations. He managed, for instance, to remove a likin boat that had been moored for two decades “right in front of our examination shed and in the way of steamers leaving the adjoining wharf.” In taking the vessel to a new berth inshore, Morse achieved what his predecessors for twenty years had failed to do. At about the same time the hoppo also accepted his proposals for the rearrangement of substations used in native customs collections.39 Evidently the situation in 1903 at Canton was far more conducive to change than those Morse had encountered in his other assignments.

Some of the commissioner’s duties had nothing to do with trade. He had to decide, for example, whether to abolish the Canton T’ung-wen kuan (Interpreter’s College), established in 1864 as an offshoot of the Peking prototype—one of Hart’s pet projects. Like the parent program at the capital, it had been designed to provide a measure of Western learning for aspiring diplomats, translators, and other students of foreign affairs in China. But the Canton branch had become increasingly superfluous as more and more local schools devoted themselves to foreign subjects, including foreign languages. This dramatic growth of alternative education was part of a broad post-Boxer reform movement initiated by the throne and promoted independently in the provinces. Among the dramatic educational changes of the early twentieth century were the establishment of China’s first National University at Peking in 1901 (it absorbed the Peking T’ung-wen kuan in 1911) and the abolition of the civil service examination system in 1905.

Morse decided against continuing the Canton T’ung-wen kuan for eminently practical reasons. In the first place, the two foreign teachers, Summers and Zazersky, did not want to stay. Summers, in fact, had pharyngitis and was “threatened with loss of voice.” The Japanese teacher had already quit; of the two Chinese managers, one received an appointment elsewhere, and the other was simply incompetent. Besides, as Morse remarked to Hart, Canton had “an abundance of good schools” for English-language training.40 Increasingly Morse spoke with authority—at least when he had the energy to speak.
Suffering Not So Silently

The remarkable feature of Morse's performance at Canton was that he achieved so much in the face of such extreme hardship. Part of the problem was the combined discomfort of heat, humidity, and insects endemic to the southernmost regions of China. British Consul E.T.C. Werner once described Canton as a place where "everything was being mildewed for three-quarters of the year." These nine months, he wrote, were a time when the walls of one's rooms dripped with moisture, when one's skin did ditto, the pores seeming never to close, when one was constantly stung by mosquitoes and sandflies, when ladies sitting at dinner had to put their feet and ankles into paper bags to prevent them being bitten, when the steam-damp spoiled the pages and pictures of one's library books, cockroaches ate off the backs of the covers, and the borer beetle . . . tunneled through volume after volume from title-page to index, when swarms of flying ants, moths, etc. cremated themselves in the lamps or dived into one's soup, white ants ate through the floors of the rooms and pillars of the houses, when the atmosphere seemed almost too solid to breathe and prevented sleep at night, when one yearned for a bite of frost.41

Adding to Morse's misery was a powerful recurrence of the illness he had acquired in Taiwan. On May 10, 1903, he reported to Hart:

I feel complimented in being sent here but wish only I were stronger for the work. It is true (with exceptionally cool weather) I have less of the pain I had during my last month at Pakhoi, but I am not up to the physical fatigue of going into the city and of inspecting for myself. I could do the Canton duty if I could sit in my office for fixed hours but Dr. Davenport forbids me dinners, evenings out and physical exertion and I can only feel a sort of hope that I shall not fall short of your expectations.42

Morse's semiofficial letter to Hart of June 14 begins

I was unable to write last week as I took a week end with Brazier at the Peak [i.e., the high hill on Hong Kong Island] for my health. Sunday is the only day I can find to write this letter. At the office I am liable to constant interruptions which I cannot prevent; and out of the office I had to spend nearly all my time in a long chair to mitigate the pain from
which I suffer—quarantine or medical inspection cannot be introduced here, the Chinese from the Viceroy down are anxious to have the sick and dead brought in, and they come in freely by steamer and steam launch sometimes nearly a dozen bodies a day, to the danger of the community and our boarding officers.43

Much more could and should be written on the epidemiology of South China during the Ch’ing period, not least concerning schistosomiasis.44 As Morse’s letter indicates, Chinese as well as foreigners fell victim to a host of poorly understood and often improperly treated diseases—especially at Canton. But at least Hong Kong stood nearby as a retreat for Westerners. Morse’s correspondence with both Hart and Bredon reveals that “the Peak” continued to provide a substantial measure of relief from his afflictions. On June 24, 1903, for example, Hosea wrote to Bredon, “I am feeling run down again . . . [and] suffering a good deal of pain so intend to run away on Friday night for a week end at the Peak.”45 His letter to Hart, dated July 14, is especially revealing: “Last time I was in Hong Kong I consulted Dr. Rennie, formerly of Formosa and Canton. He gave me no hope of recovering in China[.] I am following a rigid diet and out of the office lead a very regular invalid’s life and on the whole suffer less constantly from pain than I did six weeks ago. I do not suppose however that I shall really build up in China the ‘wasted nerve tissue’ which is the doctor’s diagnosis.”46

On October 4 Morse, in a letter to Bredon, referred once more to the therapeutic effect of a visit to Hong Kong: “Three weeks ago I was off duty for nearly the whole week, two weeks ago I spent most of the week on the Peak and it did me a lot of good, so that this last week I have felt better.”47 Again, on October 18, he wrote, “I intend to run down to Hong Kong within the next week and stay for a week or so to see if I can pick up a bit in health, as I have rather more heart pain.”48

Subsequent semiofficial letters provide variations on the related themes of chronic illness and occasional periods of well-deserved rest. Yet even when Morse was feeling comparatively healthy he could seldom operate at full capacity. On November 15, 1903, for example, he told Bredon, “I am better and can attend to my duties”; yet he also admitted that he had endured a two-hour battle with the local likin authorities even though he could “hardly talk.” Nor was Morse the only one in his circle to suffer. In the same letter he expressed deep concern over the health of his staff. Neilsen, for one, had been advised by Dr. Rennie to leave Canton immedi-
ately. If not, Rennie had warned, “he will get into my [Morse’s] state.” Morse’s letter concludes with a single-sentence paragraph referring to Nan: “You see I have lost my amanuensis; her temperature has been 105 and (one day) 106, but she is better now.”

Under the circumstances, we might well be astonished that Morse got anything at all done at Canton. Yet the commissioner not only performed ably but also served as a source of inspiration for his successor, F.W. Maze. Indeed, after Maze became inspector-general of the Customs Service, he wrote to Morse commending him for both his concrete advice and his “inspiring example” at Canton. These, said Maze, proved to be “most useful to me in my subsequent career.”
As early as 1896 Hart had considered appointing Morse to the prestigious position of statistical secretary at Shanghai, but it was nearly a decade before he finally got the job.\(^1\) In his four years at this post (December 31, 1903 to December 31, 1907) Morse served in the top command of the Customs Service, and his work in this department brought him lasting fame. He handled a whole wing of its activities, where all of his hard-won thirty years of experience at the ports and on special assignments could be brought to bear. Although his health continued to pose periodic problems, he hit his stride as an editor and publisher of essential data on China and as a researcher into China’s needs in the reform of currency, weights and measures, taxation, foreign trade, and the like. Hart described the Statistical Department at this time as a “young giant” with a “capital man” at its head.\(^2\)

**Customs Publications**

Initially Morse’s main concern was to speed up the operation of the Statistical Department—especially its proofreading and binding activities. Each year presented a sequence of deadlines for the publication of *Returns of Trade*, the *Customs Gazette*, the *Service List*, *Decennial Reports*, and special works on salt, *Stent’s Dictionary*, music, China’s treaties with foreign states, and many other subjects. In addition to the editing and production of these regular publications as well as special ones, the Statistical Department was also concerned with the steady production and distribution of various forms to be used in the Customs offices and the printing of stamps for the Imperial Post Office. All this took a good deal of paper and required a printing plant.\(^3\)

Morse turned a fresh eye on these numerous complex matters and
procedures and saw many improvements to make: reducing unnecessary activity, speeding up procedures, and seeking greater efficiency in order to cut expenses. The volume of work expanded steadily during these years, and it had been agreed that a new building was necessary, into which Morse could move his new presses in mid-1905. These premises were three or four miles out in the western part of Shanghai at Sinza. The equipment was so complete, even to the casting of type, that both Hart in Peking and Campbell in London cautioned Morse against overexpansion and too great an expenditure. They wondered: Should not the Statistical Department still use other suppliers in the market? To Hart the new plant seemed more grand than necessary, but Morse, with his usual streak of practicality, aimed at self-sufficiency.

Personnel problems complicated the statistical secretary's life. He decreed a rise in wages for the Chinese staff who would now have to travel out to the plant at Sinza, together with an allowance for their transportation costs. But Hart urged the employment of Chinese who already lived in the Sinza locality—not only to obviate travel stipends but also to cultivate local goodwill. Eventually Morse had to settle a workers' strike. Then a great feud developed between the older staff members and the new compositors and other specialists brought in for the new equipment. Morse found that his assistant statistical secretary, Chaloner Alabaster, whose attainments were rather narrowly focused, led the faction of new compositors. The target of the feud was a German named Fischer, a Prussian-style plant manager who demanded efficiency, promptness, and careful accounting. The Chinese staff developed so much ill will toward the manager that Morse—rather against his wishes, since he admired Fischer and thought of him as "exceptional"—was obliged to consider having a formal investigation. Fortunately for all parties, Hart resolved the problem by transferring Fischer to the more congenial habitat of Kiaochow, where his personality might better fit in.

Despite these difficulties, the Statistical Department did excellent work. One of its tasks during Morse's tenure was to update a volume of China's treaties that had first been compiled by E.B. Drew in 1885 and published in only fifty copies. Morse, under instruction to print no fewer than five hundred copies of the revised compilation, "pushed the business through," getting his texts "from any available source (Chinese, English, American, French, etc.)" and carefully collating all official Chinese versions with the foreign originals. Morse later wrote: "The volumes, 1712 quarto, were issued before I left the Stat. Sect. in January 1908."

Many of the publications produced by the Statistical Department
compare well with the products of a modern academic research center. They were grouped under series, beginning with the Statistical Series, as described in chapter 6. The Special Series, which commenced in 1864 and numbered twenty-seven items by 1904, included several different historical and technical volumes on opium as well as special reports on other commercial products such as silk, tea, jute, and various medicines. A number of reports focused on domestic and international trade conditions, inland and maritime transportation routes, navigation problems, customs procedures, currency questions, and different kinds of taxation. Some volumes were devoted to individual cities (all important trading centers), and some dealt rather narrowly with topics such as Chinese lifeboats and the "sound trials of sirens." A few, such as an 1884 report on Chinese music, seem to have had nothing to do with commerce.

The Office Series yielded seventy-one items between 1876 and 1900. These materials also range widely and sometimes overlap in subject matter with publications in the Special Series. On the whole, however, they tend to be more directly concerned with administrative issues. Thus we find special "Commissioners' Reports" and memoranda on tariff revision, extra-treaty privileges, the Customs banking system, smuggling, and so forth. There is also detailed information on Customs rules, regulations, and personnel procedures, from collecting duties and conducting joint investigations to implementing bonding procedures, registering cargo boats, and using transit passes. Several volumes address the problem of currency reform, while others contain reports on trade prospects or proposals for increasing export trade and Customs revenue.

A number of Office Series items focus on port facilities, including yearly reports on lights (one each for every year between 1875 and 1899), dock stores, and typhoon anchorages. There are also miscellaneous reports on such varied topics as likin (1899), Chinese emigration to Cuba (1876), legal cases (1876, 1877, and 1878), China's national defenses (1882), and "foreign legations" in China from 1517 to 1899 (1899). One can even find a special volume dedicated to Yochow (1900), the site of Morse's somewhat hollow diplomatic victory.

By becoming statistical secretary, Morse found himself a close colleague and steady correspondent of the I.G., who sent him more letters in the period from 1904 to 1907 than in all of his previous career. This correspondence gives us a clear view of Hart's meticulous style of administration. He not only made repeated suggestions concerning the Reports on Trade that the Statistical Department was due to publish but also scrutinized
the *Returns of Trade*, calling even the slightest discrepancies to Morse's attention. For example, Hart wrote on December 4, 1904: “The opium which passed into consumption at treaty ports in 1903 is given on page 23 (Part One) as 58.457 Peculs and on page 12 as 58.478: is there any explanation of this slight difference?” Hart was, however, only incidentally a nitpicker. For the most part he acted as a research director, raising large questions for the Statistical Department to work on, while trying to make its Chinese productions as readable as its English ones. Reaching the public was the end in view.

**Morse as an Economic Analyst**

Under Hart's guidance, the new statistical secretary, in addition to modernizing his printing plant and procedures, embarked on projects to quantify and pin down several key factors affecting China's foreign trade. Three of the most vexing were currency, weights, and measures; Morse had edited a survey by the NCBRAS in 1888 on these issues and had pursued further work on his own. His 1908 book, *The Trade and Administration of the Chinese Empire*, indicates how truly medieval the Chinese situation was in these respects. The amount of the tael (liang, or ounce) of silver varied widely among different trades and different places, and the calculations necessary to convert funds from one tael or unit of account to another kept many people unnecessarily busy. By using the Customs offices as collecting points for data, the statistical secretary was able to pull together extensive tables showing these multitudinous variations. This of course made a conclusive case for the necessity of currency reform along with the reform of weights and measures in general. Morse's conclusions were widely circulated in China and abroad, laying the groundwork for such a reform.

Another of the functions of the statistical secretary was to produce annually a summary report on the foreign trade of China for the preceding year. Morse's first effort, for 1903, was a work of judicious generalization about the rise or decline of production and trade and the collection of revenue on different commodities in different places. It was a complex scene that had to be described with care and discrimination. Morse's observations indicate the quality of his mind as well as the value of his experience. For example, in explaining why the importation of foreign opium increased even though the price was higher per unit, he emphasized the decline of native opium that resulted from a patriotic movement to eradicate domestic production in China. In accounting for the increased importation of yarn to
supply Chinese weaving of cotton goods, Morse pointed directly to the high costs of imported cotton goods from Manchester, Lowell, and Atlanta. This, he maintained, demonstrated how the thrifty Chinese peasant, when he finds the "price of what he desires beyond the limit which he considers within his means, throws his cheap labor into the scale and thereby alters the course of trade." \(^9\)

With respect to tea production—recall his earlier advice to Ch’ing officials in both Taiwan and Hunan—Morse remarked that "the extreme subdivision of plantations and consequent multiplicity of interests," together with a short season for producing tea, put Chinese production behind that of British India. To remedy the situation, he advocated that Chinese tea guilds invest in the education of the growers and in advertising their product. The Ceylon tea planters, he argued, had invested heavily in promotion, whereas China’s traders “do not yet realize the necessity of advertising.” He suggested that Chinese producers “must tax themselves as the Indian planters have done” for these purposes. Morse concluded: “The Chinese tea traders can save the Chinese tea trade and no one else can.” \(^10\)

Another of the statistical secretary’s insights concerned China’s balance of payments—a subject with which Morse would earn his fame. His *Report on the Foreign Trade of China for 1903* posed the problem by noting a huge discrepancy between China’s imports, estimated at 310 million taels, and Chinese exports, which he calculated to be 236 million taels. The next year Morse published *An Inquiry into the Commercial Liabilities and Assets of China in International Trade*, designed to explain how China could meet its heavy payments of loans and indemnities to the foreign powers despite the fact that Chinese imports had paradoxically increased until they were now “a third greater than the exports.” \(^11\) This question naturally preoccupied Hart’s superiors in Peking. It was thus at the I.G.’s request that Morse tried to calculate all payments inward and outward that would affect China’s fiscal situation.

He faced many difficulties with the data. Hong Kong, for instance, was a free port where trade figures might be ambiguously either local or international. Foreign firms often failed to report (or underreported) the profits they took out; and the Ch’ing government had no precise data on remittances sent back to China from overseas Chinese. Nonetheless, Morse managed to produce a large and comprehensive table of estimated assets and liabilities.

China’s assets included exports of merchandise, shipments of bullion and coin, expenditures on the development of railways and mines, and
outlays not only on foreign legations, consulates, and garrisons but also on the maintenance and repair of war and merchant vessels. Funds imported to maintain foreign missions, hospitals, and schools, expenditures by tourists, and remittances from immigrants abroad also counted as assets. Against these figures stood liabilities such as imported merchandise, bullion, and coin, principal and interest on loans and indemnities, expenditures for Chinese embassies and consulates abroad, money spent by Chinese students and travelers, net profits of foreigners remitted to home countries, costs of freight and insurance, and imported munitions of war. Nearly all these sums had to be in round figures—at the level of intelligent guesses rather than hard data.

Totaling his estimates, Morse arrived at liabilities of 423.7 million HK (hai-kuan; i.e., Customs) taels for liabilities and 424.7 million taels for assets. Except for merchandise, the largest single figure was the remittances from Chinese abroad, which he calculated at 73 million taels on the basis of extensive studies by a German of the total number of Chinese residing in foreign countries. Takeshi Hamashita, a well-known economic historian at the Institute of Oriental Culture at Tokyo University, points out that Morse was the first person to take into account these vast overseas Chinese remittances. Morse also broke new ground by considering the economic role of Hong Kong and the complex multilateral commerce with China that embraced not only the West but also India, Southeast Asia, Korea, and Japan. By so doing Morse proved that China's trade was much more in balance than had previously been perceived. He invented this approach, which remains a fundamental contribution.\(^\text{12}\)

The balance of payments in China's foreign trade was a subject that had engaged the attention of many thoughtful administrators before Morse. Commissioner Dick at Shanghai in the 1860s and later Kopsch, Hippisley, Jenks, and others had tried their hand at it. Hart suggested that Morse get advice from Sir Charles Addis and introduced the vicomte d'Ollone to him for the same purpose. Morse also had to be mindful of the expressed interest of Ch'ing officials, notably Chao Erh-sun at the Board of Revenue (Hu-pu), and members of the new Board of Trade (Shang-pu). Later in the 1920s, when economist Charles F. Remer spent five years calculating China's foreign trade balance, he also settled upon the prime importance of Chinese remittances as the invisible hand that maintained equilibrium.\(^\text{13}\) In effect, Morse's early estimates were the most comprehensive at the time and advanced the subject to a higher level of methodological sophistication.
Hart, who had his own ideas about format and details, provided considerable guidance to Morse in his early writing projects. He welcomed Morse's conclusions about China's balance of payments and the crucial role of "invisible" remittances by overseas Chinese. He also accepted Morse's analysis of Hong Kong's role within the framework of multilateral international trade. But Hart pushed the notion that the sums collected and paid to the bankers' commissions to meet indemnity and loan obligations did not actually leave the country. His reasoning was that payment of bullion into the banks did not lead to its shipment abroad. Such exports of funds were made in other ways, and the silver bullion (sycee) went back into circulation in China. Morse did not pick up this idea—probably because he thought it presented too superficial and optimistic a picture. As Hamashita observes, Morse remained objective about economics, whereas Hart sometimes tried to make his figures look better for China's sake.¹⁴

Hamashita emphasizes, however, that the effort by Morse and Hart to describe China's national economy was hindered by regional and local factors.¹⁵ This was particularly true as Chinese administration became ever more decentralized in the early 1900s. Even the most rudimentary calculations involved substantial difficulties. In the first place, the enormous variation in the value of local currencies, and the use of copper, silver, and gold for different kinds of economic exchange, complicated all calculations. Furthermore, the increased autonomy of regional officials hindered efforts at centralized supervision and accounting. Many issues were slippery. For example, Chinese immigrants sent in money, but they represented at the same time lost labor. Moreover, these immigrants were a "regional" factor (the great majority were originally from South China) rather than a "national" one. Hong Kong presented a different kind of problem: in some respects it could be considered part of China, but in others it was essentially independent as a British colony.

Against the trend toward decentralization, the inspectorate general and consortia of foreign banks served as intermediaries, helping to integrate local and central offices as well as domestic and foreign trade interests. Although Morse did not fully understand the complex interplay of various centrifugal and centripetal forces operating in China, he nonetheless pioneered in defining the Chinese national economy, making possible more accurate conclusions about China's balance of payments. Moreover, from a professional standpoint his service at the Statistical Department marked his transition from a customs commissioner to a highly regarded specialist on the trade and administration of the Chinese Empire.
Health and Other Problems

Morse was able to achieve so much at Shanghai in part because he felt well, at least initially. He had anticipated this might be the case. On January 24, 1904, he wrote to Hart: “I am very thankful to be sent here as I hope much from the climate. Of course I do not look for miracles: I have had too long a series of Southern and outpost ports, but if I cannot pull myself together at Shanghai, I cannot anywhere. I shall like the work too and am gratified to find that you have raised me in the scale of Commissioners, which I hope I may take to mark appreciation of my work.”

On February 7 Morse reported to the I.G. that “Shanghai is agreeing with me, which is a comfort”; and two weeks later he enthused: “I am distinctly better than when I left Canton . . . and feel much encouraged.”

But in May and June he experienced severe relapses. On May 29 Morse told Hart that the month had been “uncomfortable,” and on June 22 he lamented: “I have had a great deal of pain in the last two weeks and cannot write much at a desk.” Although Morse’s health usually appears as the last point in his semiofficial letters, on July 3 it was the lead topic: “I have had a bad month of it,” he wrote. “First in May much pain, then the retention only of milk, then non-retention of milk. Then I had to give up, quit the office and go to bed. I have been back in the office for a week but am still very weak.”

Nan’s unremitting attention during this trying time must have been a great comfort to Hosea, as was the faithful care he received from his devoted niece Janet, who stayed with the Morses from 1903 to 1907. During this period Janet attended Miss Martha W. Jewell’s school as both a day student and a boarder. It was then considered the best school in Shanghai. Pearl Seidensticker (better known as Pearl S. Buck) attended Miss Jewell’s before going to college in the United States in 1910. Seidensticker, who was well on the way toward the emancipation she later achieved, found the school dreary beyond belief. It was, she reported, built of “somber and indestructible grey brick,” and the reception parlor’s windows were “partly sunken beneath the pavement of the street outside and . . . heavily barred against thieves.”

Miss Jewell turned out to be “a handsome, sad faced woman” and a ruggedly compassionate Christian, full of charity. From a “proud but
desiccated New England background” she brought to China “a severe goodness, a passionate resignation, a will of steel.”23 Evidently she considered Janet Morse to be one of her exemplary pupils. At the end of Janet’s schooling Miss Jewell wrote a testimonial dated June 10, 1907, which certified Janet to be “a young lady of good character and principles. She has always been willing and obedient both in the class room and out. She has a cheerful disposition and good ability as a student.”24

Hosea seems to have endured the most persistent suffering at Shanghai, but neither his niece nor his wife escaped misery. Janet was hospitalized with typhoid in March 1905, and Nan experienced a severe psychological blow later in the year.25 The cause was a virulent outbreak of Chinese antiforeignism in early December 1905 known as the Mixed Court Riots. The trouble began when renovation of the Shanghai Municipal Court jail required the removal of its Chinese women inmates. At the same time the Chinese magistrate of the Mixed Court ordered a group of fifteen Chinese girls (whose adoptive mother was suspected of transporting them for prostitution) to be held in the Mixed Court jail. The British assessor, sitting with the magistrate, demanded that the police take custody of the girls in the newly repaired Municipal Court jail. When the police did so by force, it was an affront to Chinese national pride. Popular suspicion of the Mixed Court’s intentions touched off mob violence on December 8, for which an anti-American boycott from May to September had prepared the ground. (The boycott had been inspired by the shabby treatment of Chinese at the hands of customs officers and immigration authorities in the United States.)26

Although the initial incident blew over quickly, antiforeign sentiment continued to burn in the International Settlement and surrounding areas, fueled by inflammatory placards, gang activity (encouraged, according to some, by the notorious head of the “Shanghai Beggars,” Cheng Tse-ming), and periodic confrontations between angry Chinese and the understaffed foreign police force. On December 18 widespread violence erupted in various parts of the settlement. One eyewitness account, carried in the December 22 issue of the North China Herald, describes the chaotic scene on Nanking Road:

Rickshas were overturned. A foreign lady was hustled and her cloak torn off. A motor car belonging to G.D. Pitzipios, the British Vice-Consul, came along; the crowd seized it, maltreated the occupants, turned the car over and set it on fire. . . . Several foreigners on bicycles were
stopped and their machines thrown into the bonfire. A lady was among the cyclists stopped. Then the mob turned their attention to the Town Hall, which they stoned, smashing the windows. A body of police, with arms, arrived and were greeted with a volley of stones. They fired two rounds of blank cartridge without producing any effect on the mob and then fired a round of ball cartridge killing three men. 27

Similar incidents took place in other parts of the settlement from December 18 to December 21. Angry mobs set foreign buildings on fire, including the Hotel Metropole; Westerners were harassed on the street, and several reportedly received knife wounds. Dozens of Chinese were killed or wounded by settlement police or local Western military forces, including Bluejackets and Marines. Troops armed with machine guns occupied the Hongkew Creek Bridge in Broadway, "in the centre of what was regarded as the most dangerous district." 28

The Shanghai riots were a harrowing experience for treaty port residents accustomed to the ease and comfort of Chinese service and special privilege. Janet, en route to Miss Jewell's school, "nearly got killed by a mob" and was saved only by her faithful ricksha man, who deftly negotiated Shanghai's back streets to make good their escape. 29 Nan Morse, for her part, was thrown into a panic from which she seems never to have fully recovered. For at least two years after the uprisings she remained traumatized, as Morse's correspondence with Hart during the fall and winter of 1907 indicates. In one particularly poignant letter, dated December 24—which remains to this day folded up in the I.G.'s private journal—Morse wrote: "I leave Shanghai in better physical condition than when I came here. Mrs. Morse's condition is not however what I would like. She had a great nerve shock, and we think even an evanescent physical stroke, in the riots of Decr. 1905, and it will probably be a relief to me to get her away from the possibility of further troubles." 30

Public Life in Shanghai

Notwithstanding these tribulations, Morse found the time to pursue various personal interests outside the Customs Service. As he described the situation to Hart in mid-1905: "My gradually improving health allows me to take up some of the lines of general usefulness in which I am interested, always on the condition that someone else does the work—such as the Library Committee, Treasurer of the Diffusion Society, Chairman of the Board of
Heading the Statistical Department

Directors of the Young Men’s Christian Association, [and] Vice President of the Asiatic Society.”

Morse’s leadership role in the NCBRAS was a natural outgrowth of his earlier involvement with the organization as well as his enhanced status in the Customs administration and his developing reputation as a Chinese historian. As an officer of the society, he presided over some meetings and gave periodic reports, but increasingly his passion became scholarship. In 1906-7, for instance, Morse published two pieces in volume 38 of the journal of the NCBRAS. One was a review of Frank E. Hinckley’s *American Consular Jurisdiction in the Orient*. This book dealt with the entire Orient, including Egypt and China, but was written before Hinckley had visited China. Morse praised the volume for its comprehensiveness but urged a revised edition to take account of the mass of custom and precedent that had grown up in connection with the Mixed Court and the municipal government of Shanghai. He then provided a list of errata, beginning by asserting that the use of the term *Opium War*, which among scholars today has universal application, “is perfectly legitimate for a pamphleteer or a politician but not for an historian and a lawyer.”

Morse’s second publication was a paper entitled “Currency in China,” the genesis of which was mentioned in chapter 6. At the annual meeting of the NCBRAS on April 4, 1907, it was announced that “Mr. Morse’s paper . . . attracted much attention in the community. The Society published it in a separate fascicle and all copies were quickly sold.” This article appeared in the following year as a chapter in *The Trade and Administration of the Chinese Empire*.

In addition to his other duties, Morse served as president of the American Association of China (AAC) in 1907, when William Howard Taft, then secretary of war but potentially the next American president, visited Shanghai as a guest of the AAC. Secretary Taft’s first public performance was to present the deed of trust to the newly built Chinese YMCA in Shanghai. Morse officiated there as chairman of the board of directors and of the building committee. Speaking on behalf of the American community in Shanghai, Morse told Taft that “the American does not change his heart because he crosses the sea and when you see the Americans in America providing for the welfare of the young men of another race, contributing for the starving millions of another country, and taking every opportunity of showing his friendly feeling to another people, you may assume that the American in China shares the same feeling.”

Taft’s visit to Shanghai came at a particularly auspicious moment.
The Chinese boycott of 1905 was by now a thing of the past, while Theodore Roosevelt’s role in helping the Russo-Japanese peace negotiations of 1905 seemed to mark America’s entrance upon the international scene of power politics. The good feeling between Chinese and Americans on this occasion manifested itself in the full participation of the local Ch’ing officials and their wives in several social events: a ceremony at the Chinese YMCA, a banquet at the Astor Hotel, and a sumptuous garden party given by the thirty-two Chinese guilds of Shanghai. This last affair took place at the famous Yü Garden, a scholarly retreat dating from the Ming dynasty. The local Chinese authorities provided a spectacular display: “The summer house and entrance to the Yu Yuen . . . were gorgeously decorated with flags, flowers, Chinese lanterns and lamps, festoons of bunting, etc. All the Chinese officials and gentry were arrayed in their most expensive silks and jewelry and not a few wore foreign orders. . . . All were on terms of the most cordial friendship and quite a large number of Chinese ladies were heard greeting their sisters from across the seas in the English tongue.” 36 The Shanghai taotai made a speech of welcome, and the head of the Chinese community presented a fine silver bowl to Taft from the Chinese residents of Shanghai.

At the evening banquet the 250 guests included the consular body and leading citizens of the community. Morse chaired the head table, sitting next to Taft, while the Reverend Francis Lister Hâwks Pott (a local historian and a friend of Morse’s), the new American judge, the Honorable L.R. Wilfley, the American consul-general, Charles Denby, and three other notables were all vice chairmen at the heads of other tables. Morse offered a keynote address looking back at the growth of the happy relations between Chinese and Americans. He praised the Chinese diplomats Wu Ting-fang and Liang Cheng as well as American officials in China such as Charles Denby, Edwin Conger, and William Woodville Rockhill.

In the body of his speech Morse traced the long history of Sino-American commercial relations before the Civil War and made a special point of mentioning the American firms of Russell and Company and Augustine Heard and Company, as well as such influential individuals as Purdon, Olyphant, Wetmore, Forbes, and other leaders of the American merchant community in Shanghai. He also recalled the rise of the American missionary movement beginning with Dr. E.C. Bridgman—a movement in which American missionaries now predominated among Protestants. He referred to Peter Parker’s early service as a medical missionary and the pioneering publication work of Dr. Young J. Allen.
Morse seemed to take pride in noting that twelve of the fourteen Protestant Christian colleges in China were then under American auspices. He hastened to add, however: “No attempt has ever been made to turn the youth of China into Americans; there is today a greater conservatism in the American schools than in the Chinese, and the pupils who have passed under American influence while they have a wider outlook on the world are distinguished by deeper love for their own country.” Morse drove home his nationalistic point by remarking: “Gentlemen, I am not merely indulging in the favorite national pastime of making the eagle scream. In that respect we have changed. . . . My object is to show that in China there are important American interests which require protection and encouragement.”

Secretary Taft’s speech in response covered several aspects of American policy. First, he insisted that the United States was not about to sell the Philippines to another country but would either keep the colony or “train” it for independence. Second, he stressed that America believed profoundly in the open door and would continue to encourage the untrammeled development of the Chinese Empire. He also mentioned American support for Chinese reform as well as the notion of “China for the Chinese.” He celebrated the end of the 1905 boycott and America’s recent return of the first portion of the surplus Boxer indemnity for educational purposes. In closing, Taft stressed the need for changes in American administrative practice abroad. He urged consular civil service reform, touched on the need for “a more complete body of laws for Americans in China,” and called for an American government Federal Building in Shanghai to hold the consulate general as well as the new American Court, decreed in 1906. After remarks by several other leaders of the local community, Morse concluded the evening by having Americans, British, and Germans sing the same tune, using the various words of “God Save the King,” “My Country, Tis of Thee,” and “Neil dir im Siegeskranz.”

This celebration was part of a systematic lobbying effort designed to achieve the goals outlined at the end of Secretary Taft’s speech. A sixteen-page pamphlet entitled The Needs of the Judiciary and Consular Service in China—illustrated by glossy pictures of the Shanghai consular buildings of nations other than the United States—spelled out the agenda. In it, arguments for the new court, new regulations for the consular service, and the development of American law codes appropriate to national needs in China all appeared as a memorial to the U.S. Congress. The pamphlet also offered proposals concerning the jurisdiction of the consular courts, the salaries of court officials, and the building of new quarters for the American Court.
The printed record of the recent social events was part of the same broad propaganda effort designed to enhance the dignity of the American community in Shanghai. But it also had less self-interested purposes. Among the attached documents was a letter from Morse, in his role as president of the AAC, addressed to Elihu Root, secretary of state, concerning the desirability of American support of the Chinese anti-opium movement. Morse’s letter gave a historical account that stressed how the original evil arose when the Ch’ing government in the early nineteenth century was unable to stop importation. He did not mention the effectiveness of British cannon fire in defense of free trade in opium. In any case, the importation of foreign opium had become a minority trade factor because native production was now six to ten times as great. No American had in recent years attempted to enter the opium trade. Morse noted that the current anti-opium movement came not simply from the top of the government but also from the modern-minded and in many cases American-educated younger generation of China. America, Morse felt, should lend its support to this important Chinese reform effort.40

Leaving the Service

Soon after Taft’s departure, Morse himself left China. He had applied for leave in early September 1907 and received permission from Hart in a letter dated the twelfth of that month. The I.G. wrote: “Your leave will be granted and arrangements made to let you go in December . . . I must thank you for holding on so long and for the excellent work you have been doing.”41 On December 20 Hart elaborated on the reasons for his gratitude:

You have done excellent work in every position and at every place, and your performance of duty as Stat. Secy. has been most excellent: I am very sorry you are going away, but your health demands it and I now begin to understand personally what a health demand really means. At S hai I have been much pleased with your outside work too: you have taken an active part in educational, international, and philanthropic doings, and your cooperation has been both useful & creditable to yourself, to [the] public, to the Service, and to the doings themselves. For all I thank you very heartily.42

Four days later Morse responded in kind: “I cannot go without expressing my sense of the consideration you have shown me, especially in the past four years; this office has been at times difficult, and without your support
I could not have kept to my work. . . . I send you all good wishes for your future life, and the hope that you may carry out all that you think to be for your own good and the good of the great service which you have created." 43

The Morses left China in January 1908. For the first six months of Hosea’s official leave they were in the United States. During this time they undoubtedly visited Nan’s relatives in New York and Germantown, Pennsylvania. They also spent some time in Seal Harbor on Maine’s Mount Desert Island. Harvard president Charles W. Eliot had a family summer place just down the road in Northeast Harbor, but Morse may not have realized that the man he so admired was so close at hand. Morse wrote to a friend, “This is a lovely place, but the seaside does not agree with either of us; still Mrs. Morse has got in a lot of flower painting.” 44

Most of the Morses’ time was spent in the Boston area, Hosea’s emotional center of gravity. There he reestablished close ties with Richard Henry Dana III, his Harvard classmate. Dana had been a longtime and well-known advocate of consular and civil service reform, having worked with five U.S. presidents. He may well have inspired the attention given to this issue during Secretary Taft’s visit to China in 1907. Enjoying particularly close relations with President Theodore Roosevelt (Harvard, 1880), Dana arranged for Morse to meet him. In a letter to Roosevelt dated April 22, 1908, Dana emphasized Morse’s distinguished career in China and continued: “Mr. Morse has been very much interested in the consular question and the question of the ex-territorial courts. He is quite pleased with the improved personnel of the consular appointees; but has still several points about which he would like very much to talk with you, and which are very essential to the best interests of our country in the vastly increased importance of our relations in the east.” 45 Dana went on to praise Morse’s professionalism and to suggest a meeting between him and the president.

The papers of President Roosevelt reveal that Morse, accompanied by a man named Baker, perhaps of the State Department, had an appointment with him at 2:30 P.M. on Tuesday, April 28, 1908. There were no appointments listed for later in the day, which suggests a long chat. 46 Their conversation and Taft’s later election to the presidency set the stage for an invitation to Morse to become American minister to China.

In June 1908 Hosea attended his class dinner, commencement, and other activities at Harvard while staying at the Bellevue Hotel in Boston. He commented at the time that “Mrs. Morse is devoting herself solely to the dentist and does not enter into any of our festivities.” 47 (Whether she was in pain or simply unenthusiastic about the proceedings is difficult to say.) It
was presumably during this visit that Professor Archibald C. Coolidge of Harvard’s history department sounded Morse out about the possibility of teaching courses on the economics of Asia at the newly conceived Harvard Business School. Hosea refused, however, presumably because he felt that he did not have sufficient energy both to teach and to write. Many years later he remarked: “If I had accepted [the Harvard offer] I should have done my Trade and Admin’n but my other nine volumes would have remained unwritten.”

The Morses left for England at the end of July, whereupon Hosea wrote to Charles F. Thwing, one of his longtime acquaintances: “I feel that I am running away from the battle, parma non bene relictia, and am shirking an obvious duty, but there is no help for it. I see no comfort and the means to both health and strength in this country. I am leaving my obvious work and my friends, among whom I count you not least.” His hope was to settle at least for a while in Oxford, where his classmate Louis Dyer had become a don. Morse had competed with him for top rank in classics at Harvard. When Morse arrived, however, he learned that Dyer had just died. Morse reported sadly to Thwing: “Dyer’s death was a blow to me. Not on the material side, but I counted on tying again the knots of intimacy with that genial soul and finding in him some touch of Americanism in Oxford surroundings. . . . I shall be in Oxford a few days toward the end of Sept. and will let you know what I learn.” In mid-September, after visiting Dyer’s grave, he wrote:

I am sorry I came to Oxford. My experience of one week of fine weather has demonstrated that neither of us can do well here; but I yearn for the place. Those with whom I have acquaintance here were all of Dyer’s intimate circle, so that I see I should have a happy and ‘satisfying’ life; and the charm of the place itself appeals to me strongly. But it cannot be, and I must now start to search the suburbs of London for that combination of all the perfections which I look for. My present feeling is one of despair.

Anne Welsford, Nan Morse’s niece, later commented bitterly:

I find this a heart-breakingly sad letter. I do not believe for a moment that one week of fine weather proved that H.B.M. could not be well in Oxford. What it did prove was that his wife was determined not to settle there. He longed for a place where he would have intellectual companionship and even some links with Harvard. I expect A.J.M. saw that she
would inevitably be drawn into a kind of social life which she didn't want. Attacks of neuralgia would add to her reluctance, but anyway Oxford blue stockings would not be congenial to her. She would not share their interests. But she must have seen how much it meant to Hos. I find it hard to excuse the selfishness of her choice. He gave up too easily. He should have stood his ground and fought it out, but I'm afraid he must have lost the battle long before.\textsuperscript{52}

Possibly Nan felt that she had gone where Hosea was sent in China and now it was her turn to choose. As usual, Morse uttered no word against his wife.

From Oxford the Morses went to Great Bookham, Surrey, where they stayed with Nan's youngest sister, Alice, and her doctor husband while they went househunting. Finally they found what they wanted and "took it promptly, at Ewell, Surrey a mile or so short of Epsom."\textsuperscript{53} It was at his sister-in-law's house on January 20, 1909, that Morse received a telegram from Nan's New York cousin, George Marcus, asking: "Would Hosea consider accept post our minister to China if offered[?] mail short biography."\textsuperscript{54} This was a firm offer from the newly elected administration of President Taft, and Morse considered it carefully. Friends urged him to accept the position, which he found "tempting," but ultimately he declined, feeling that he was not "physically fit to undertake its duties."\textsuperscript{55}

Hart was particularly disappointed by Hosea's refusal to become American minister to China. In June 1909 he expressed deep regret that Morse "did not feel up to that post," and twice more during the year the I.G. urged him to "reconsider & accept."\textsuperscript{56} Dick Dana, who vowed to do the necessary groundwork if Morse would agree to reconsider the job, was also disappointed, but understanding. He wrote: "It gives me great pleasure to learn that you were practically offered the position of Minister to China, and I only regret that you felt obliged to decline it on account of the state of your health."\textsuperscript{57} Years later, in 1929, reflecting on the lost opportunity, Morse wrote to a Twing, "I would rather [have written] Gray's Elegy than capture Quebec."\textsuperscript{58} Plainly he was not a politically ambitious man, but he doubtless would have been a well-informed and able American representative to China.
Morse’s initial two-year leave was prelude to an already-planned retire­ment, although he did not give final notification to Hart until the autumn of 1909. During these two years, Morse prepared to devote himself full time to historical scholarship. As he wrote to Charles F. Thwing on January 25, 1909: “I shall now settle down in my Tusculum to quiet study. I have got my books unpacked and am sorting and classifying my papers.” Thwing had graduated from Harvard two years after Morse and for a number of years had been president of Western Reserve (now Case Western Reserve) University in Cleveland, Ohio. They had renewed their acquaintance in China during the autumn of 1907, when Thwing and his wife visited Shanghai on an around-the-world tour. From 1908 until Morse’s death the two maintained an extensive correspondence, from which much informa­tion for this chapter has been drawn.

The March of Morse’s History

Morse’s two years at Briarside, proved extremely productive from a scholarly standpoint. In 1909 his book The Gilds of China: With an Account of the Gild Merchant or Co-hong of Canton appeared in print. This short, comparative work of less than a hundred pages was apparently inspired by the publication in 1908 of two specialized studies on British guilds. It also grew out of an article by Daniel J. Macgowan on Chinese guilds printed by the Journal of the North China Branch of the Royal Asiatic Society in 1887. We know little else of its genesis, however, for the slim but solid tome seems to have occasioned no particular comment by Morse.

He had more to say about the initial volume of what became
Morse's Second Career

his magnum opus, *The International Relations of the Chinese Empire*. This first of three volumes, itself nearly seven hundred pages long, was titled *The Period of Conflict, 1834–1860*. Morse completed it in 1909 and saw the book published in the following year. He obviously worked quickly. On January 25, 1909, while staying with Nan's sister, Alice, Morse wrote: "I have already my first hundred pages rolling through my head but we have not yet the settled life to have put anything on paper." By August he was able to report to Thwing: "I progress steadily with my book—I judge that about half my first volume is in its final shape."

Of course things did not always go smoothly. In the same letter he admitted: "Occasionally I come up against some question that sets me looking up fresh material, and just now I have boggled for two weeks over two or three pages, before I could get them to my satisfaction. The Foreign Office is very obliging, and my inquiries yesterday took me to the Admiralty, where I found the greatest willingness to help." Morse added that from this point onward he would "get but little help from a public library," as he owned most of the "original material" needed to fill the "many lacunae."

This material included some of Hart's letters to his commissioners. The I.G. had also offered Morse the use of his priceless seventy-six volumes of journals, but the Hart family managed to block access to them. Morse nonetheless dedicated the first volume of his *International Relations* to Hart—who, characteristically, questioned whether he deserved such a dedication. Then, equally in character, Hart edited it. "I think," the I.G. wrote, "it is too stiff and have run my pen through words it may be best to omit." The result was a bare-bones tribute:

TO SIR ROBERT HART, BART
INSPECTOR GENERAL OF CHINESE IMPERIAL CUSTOMS AND POSTS

The publication of two scholarly volumes in the space of two years suggests that Morse was trained to produce manuscripts quickly without too many backward glances. It also indicates that he was reasonably healthy. Indeed, despite a heavy schedule of writing and research, Morse found the time and had the energy to attend his thirty-fifth Harvard reunion in 1909. A poem delivered at the class dinner at the Union Club in Boston on June 29 commemorated him and several of his friends:
Ho there, Spinney! home from China
    Where the maids have almond eyes;
Cheer our worn and jaded palates!
    Teach us how to make dog pies!

Wyman, too, has been contented
    To abide while others roam
Keeping young because of Nellie
    Whom he's always seeing home.

This man strokes a gallant eight-oar;
    That man stands to see the show;
But Dick Dana delves at law tomes
    While Strong trains up men to row!

Bendelari! Bendelari!
    Born beneath a smiling "Sun,"
Tell us, for we've often wondered,
    How your work was ever done?

In the night you read French novels
    Daytimes you read Greek to us,
Wading through the knottiest places
    And without the smallest fuss.

History and journalism
    Are the merest play to you.
Richer are the years before you;
    May they bring you blessings new!

In our college days one stripling
    Seemed to us but just half-grown;
Yet where'ere the British drum beats
    Now the name of Morse is known.6

The author, Edward Hamilton Sears, was Morse's classmate both at Harvard and at the Boston Latin School. He had lived in Hollis with Morse during their freshman year.

Unfortunately, in the autumn of 1909 Hosea's old troubles resurfaced, and in November he wrote his resignation letter to Hart. The I.G.'s response from London, dated November 30, 1909, reads: "I am very sorry,
indeed, to read you resign. . . . You have done excellent work through all your career in the Customs & your services have been much appreciated: your dropping out will be felt and regretted by all of us. . . . What I want now is to say how sorry I am you resign, thank you for past services, and wish you a future well filled with good work and blessed with good surroundings and unbroken happiness: prosit!"7 Morse’s illness obliged him to lay aside his scholarly work for an entire year, during which time Nan in particular contemplated various moves designed to bring Hosea improved health. On September 2, 1910, from the Royal Links Hotel, Cromer, Hart wrote in obvious sympathy: “I am sorry ‘intercostal neuralgia’ has topped your troubles and I hope your proposed change of place will suit you. . . . I trust sincerely you will have the good fortune to do so for your life is valuable and your long spell of suffering entitles you to relief."8

Searching for Relief

In November 1910 the Morses went to the continent accompanied by Janet. There they were to remain, constantly moving about, until May 1913.9 Drew wrote to Thwing in January 1911 that Morse would probably “never have the health” to do another volume of International Relations. “He is in Munich, where his wife has received from the doctors the most discouraging of prognostications; but no word of this may be said in quarters whence it may reach the brave and pathetic sufferer. It is too—too sad.”10 Fortunately Morse pulled out of the depths. In March Nan wrote from Munich to Thwing:

This flat is very comfortable and since we came, Mr. Morse is very much improved in health. He is able to read but not write letters or take up any work yet, but he could write letters if he were not forbidden—he takes two short walks a day—and is free from the dreadful pain he has had constantly for the last eighteen months and frequently for the last sixteen years. Dr. Baumann who attends him says the improvement is astonishing and more than he expected, but persists in saying that it is not permanent because “the diagnosis remains the same.”11

However, if our diagnosis of schistosomiasis is correct, the termination of Morse’s illness was to be expected after he had lived in temperate climates long enough for the parasites to work their way out of his system.

Then it was Nan’s turn to be ill with “facial neuralgia”—perhaps a
lingering effect of the "great nerve shock" she suffered at Shanghai in 1905. As she had for Hosea, she demanded for herself several disruptive moves, apparently believing a healthy location would effect a cure. On January 28, 1912, Morse described the situation in response to President Thwing's invitation to receive an honorary degree at Western Reserve University and deliver the main address:

My work has of course come to a standstill. Up to now I have been attending to my wife, but last week we brought my niece down to help. Still I can of course not carry my material around with me, and without that any historical writing is out of the question. Even my draft for my address for you will have to be rewritten; it would be pedantic to deliver an address written before the recent revolution in China, and before recasting it I must wait to see if my pessimism is to be justified or not.

He continued in the same letter to discuss the major upheaval of the 1911 revolution, which overthrew the Ch'ing dynasty and established a republic:

In China it is the unexpected that happens. I have been looking for financial difficulties, but they do not come; the taxes are not being collected regularly (other than Customs, assigned to the foreign debt), but on the other hand the well-to-do are, voluntarily or involuntarily, providing needed funds; per contra China has no insistent demand for expenditure—small army and navy, no schools, no justice or police, no roads or bridges, no fire prevention or sanitation, to be maintained, only the host of officials themselves who may be willing, or compelled, to wait for a deferred reward. . . . The Manchu nobles are showing themselves as imbecile as always for the past sixty years; and a most important question is whether Yuan Shih-kai is willing to call upon the northern army which he created, or can count upon its loyalty if called upon, for the purpose of establishing himself as Premier, or President, or Dictator, or (ultimately) Emperor—the only man of capacity yet visible. For the Heaven-sent leader has not yet emerged—certainly not in Sun Yat-sen, with whatever backing by Homer Lea.

Morse went on to say:

The people at large expect large remissions of taxation: certainly abolition of likin, certainly a waiving of the land tax for three years on change of dynasty, such as was decreed when the Manchus came to the
throne, certainly a cessation of squeezing in collecting taxes; but they will have to be disappointed. The Republicans have in fact abolished likin, but they will have to re-impose it until the government secures unanimous international consent to the sur-tax on foreign trade; and moreover a host of beggared likin employees will not make for quiet in the country. When will the debacle come? Every month of delay hastens its arrival; a patched-up settlement might allow the unquiet elements to be dealt with in detail.\footnote{15}

On September 22, 1912, Morse reported insightfully to Thwing on the thorny problem of political leadership in the early republic—a situation that seemed to require that civil authority give way to military power for the sake of national unity. By this time Sun Yat-sen, who had been elected president of the newly proclaimed Republic of China, had decided to surrender the presidency to Yuan Shih-k’ai, a military man wholly uncommitted to the notion of democracy but capable of holding China together, at least for the short term.\footnote{16} When Yuan died in 1916, China quickly disintegrated into more than a decade of warlordism. Morse wrote to Thwing:

How I wish I were ten years younger with both of us strong and that I were back in China where history is in the making. I wish too that Yuan Shih-k’ai were ten years younger; as far as I can see he is China’s strong man, nor can I see any one now able to take his place; the only possible substitute for him would be—not Sun Yat-sen nor Tang Shao-yi—but some military commander with a strong disciplined force behind him. Had the explosion come twenty years earlier, the helm could have been firmly grasped by Li Hung-chang, but for a younger man to get [things] together would be easier after a period of anarchy and devastation than now.\footnote{17}

Meanwhile Nan’s neuralgia had become worse, forcing Morse in February to delay his trip to America to receive his honorary degree at Western Reserve. Although pleased to hear from Thwing that he could get the degree and give his speech at any time, he was clearly disappointed: “I must confess to a feeling of lost opportunity that I shall not be allowed to speak ex-cathedra, with the authority of one who knows, on the change in the status of China, which is the one great event of the past decade. It is an opportunity such as is given to few of those not of the first rank, and one which will not recur, as China cannot go on providing new revolutions every year.”\footnote{18}

During the fall of 1912, in the midst of preparing to move yet again
to the Chalet Oertli in Switzerland, Morse reported to Thwing that although his own health had "gone on getting better and better, subject only to the need for constant carefulness," Mrs. Morse's condition had not improved at all. According to Hosea, Nan "suffered a great deal" and was able to find "comparative ease only on the shore of Lake Thun."19 Perhaps his wife's misery contributed to her irreparable break with Janet at about this time.

A letter from Sarah Welsford, Janet's aunt, written on July 24, 1934, indicates that the precipitating factor was Janet's injudicious complaints about her situation—presumably the hardships imposed by the Morses' constant travels around the continent and Nan's increasingly difficult personality. Acknowledging that Nan could be "hard & prejudiced," Sarah offered an analysis of the situation to Janet: "I don't think for a moment that you were altogether to blame for her attitude. I believe people made mischief. You were unwise that time at Oberhofen & talked to the people of the kind of life you had & they either intentionally or unintentionally made mischief by repeating things said in confidence. The time before in Munich I know she thought a lot of you & spoke very highly of you as a dear good girl. In fact, I never heard a word said against you until after they left Oberhofen."20 This breach between Nan and Janet must have been extremely upsetting to Hosea, who remained fond of his niece throughout his life. After the falling out, Janet visited the Morses only one more time, during World War I.21

**Back to Work**

Somehow, in the midst of the suffering and conflict, Morse managed, at the behest of his publishers, to revise *Trade and Administration* for a new edition. At the end of September 1912 it was "out of the way except for proof reading."22 He could not, however, "do any constructive work" on his *International Relations* project until circumstances became more "settled." Then, he informed Thwing, "I hope to get to work, and I shall be allowed two hours a day at it."23 By December Nan, who had been ill for fifteen months, sufficiently improved so that the Morses did not have to move again. Hosea was thus able to return to volumes 2 and 3 of *International Relations*. He reported to Thwing: "I don't often get my full two hours a day; it is as often one, of real work, but still I am getting on. I have done three chapters, of which two have not been written before by others; now I have ahead of me two of retold tales, then more of untrodden passes. I shall
not hurry, and in the end I hope that my two volumes of International Relations may prove an enduring monument."  

It is fortunate that Morse was not in a rush, for events unrelated to health would soon disrupt his progress further. First there was the matter of his still-pending honorary degree and a proposed Phi Beta Kappa speech at Western Reserve University. Morse decided he could accept the award in June 1913, and on March 9 of that year he informed President Thwing that he and his wife planned to sail on the Celtic from Liverpool on May 15 and go straight to Philadelphia. Nan was to remain with her Pancoast cousins in Germantown while he went to Cleveland and on to his Harvard commencement. He looked forward “with keen zest” to his trip.

On June 12, 1913, Morse received his honorary LL.D. from Western Reserve University. The citation read:

I present to you, Mr. President, Hosea Ballou Morse, for many years a high official of the Chinese government: who, entering into the employ of that government immediately upon his graduation from our oldest University, continued steadfastly in its service for five and thirty years: who was an indispensable collaborator with Sir Robert Hart in building up that administrative system, which was one of the remarkable achievements of the nineteenth century: who was entrusted by the government which he served with many and important missions, in the interest of finance, of politics, of peace: who has devoted, and is still devoting these later years to a luminous interpretation of the Chinese people and institutions to the western world. I present to you Mr. Morse, Administrator, Diplomatist, Historian, that he may receive at your hands the degree of Doctor of Laws.

On this occasion Morse delivered an address before the Phi Beta Kappa Society titled “The Repayment by the West of Its Debt to the East.” In it Morse construed “the East” broadly to include even Assyrian and Arabic culture. Ironically, he gave no specific indication of China’s many contributions to Western civilization, although he did acknowledge the early merits of Chinese astronomy, medicine, and banking. He then proceeded to describe in vivid and arresting detail the role of the West in opening China. Although anxious to cast American activities in the most favorable light, he did not shy away from mentioning America’s role in the opium trade—its place on “the sinners bench,” as he put the matter. On the other hand, Morse took obvious pride in describing the impressive contributions of Christian missionaries, especially in the realms of medicine and education. Not
surprisingly, he also adduced the Shanghai municipality and the Maritime Customs as examples for China of "public service on honest and well conducted lines." Morse ended his long and eloquent address with a critical discussion of recent revolutionary changes in China, pointing out that of all the things the West had done to repay its debt to the East, "none has been of more value than the vista we have offered of a government existing for the benefit of the people."\(^{27}\)

A week later Morse wrote to thank Thwing for his degree and to suggest tactfully that Western Reserve consider giving honorary degree diplomas, as Harvard did. The following autumn, after receiving such a diploma from Western Reserve, he wrote, "It is the patent of my nobility, and I am very grateful to you for the steps you took to procure me recognition."\(^{28}\) In January 1914 Morse thanked Thwing for copies of the bulletin containing his Phi Beta Kappa speech and requested that they be sent to Drew and to Nan's American cousins, the Pancoast and Marcus families.\(^ {29}\)

At the end of June 1913 Morse indicated to Thwing that he and Nan would sail back to England on July 9. They had been unable to settle on New England summer places because his wife could not stand the heat. Morse, however, reported: "I have enjoyed these six weeks much, marred by the incapacity of Mrs. Morse to enter into everything, but otherwise pure joy; and not least the part given me by you and Mrs. Thwing."\(^ {30}\)

After vacationing for two months in Scotland, the Morses settled down in Camberley, Surrey. Hosea described the circumstances to Thwing:

As our house in Ewell will not be restored to us until next summer, we have taken a house at Camberley for a year, in order to try it. So far we like it very much. . . . The place is made up of three social elements: the Royal Military College at Sandhurst, a mile or more away; the Staff College, in Camberley; and a body of active valetudinarians, retired people, mostly Anglo-Indians. The atmosphere, physical and social suits us completely, and we are strongly tempted to desert Ewell and pitch our tent in Camberley. . . . I have my books unpacked and arranged, and am now sorting my notes and MS material; and I hope soon to be engaged on chap. viii of my next bk.\(^ {31}\)

In January 1914 he told Thwing that "among those who are already my intimates you will find (if you visit) in the English who's who Thos. Seccombe, Chas. Tawney and George Grierson. There are other interesting people, but mostly military or [other] retired Anglo-Indians. Altogether my
lines seem to have fallen in pleasant places and I have put my Ewell house in agents’ hands to sell.”

Grierson and Morse both had an interest in languages. The former was a retired member of the India Civil Service who specialized in Indian dialects; the latter “loved words” and owned “several books on the derivation and history of words.” Perhaps Morse’s experience in China contributed at least marginally to his fascination with philology and historical geography, for both subjects had long been the passion of Ch’ing scholars. Place-names, Morse once wrote, as if paraphrasing the great seventeenth-century philologist Yen Jo-chü, “are most important in the history of language.”

For “lighter pursuit” at Camberley, Morse served as “manager of the details” for a Shakespeare Reading Club that met weekly during the winter at the twenty different members’ houses. He was an enthusiastic participant. In the spring of 1929 he reminisced to Anne Welsford about *The Winter’s Tale*, remarking that “the second part is pure joy. One winter I read Florizel, making my voice gentle and cooing; another winter I read Autolycus, and came on the scene singing—yes singing: that is I sort of chanted.” Morse also enjoyed a periodic “game of bowls” and relaxed at home primarily by reading Westerns and detective stories—especially those by Agatha Christie. Nan, for her part, played the piano, gardened, painted, and sewed. Together the Morses reportedly “played auction-bridge double dummy every evening.”

**The Great War**

The outbreak of World War I on August 4, 1914, disrupted the relative calm of the Morses’ life at Camberley and brought together in common cause a number of friends and relatives from different parts of the world. Thwing’s son, Francis, dropped out of Harvard, enlisted in the British army, and subsequently formed a close attachment to the Morses. He saw them often when he trained at Sandhurst, came to them to recuperate from wounds, and told them of his career hopes and eventually of his engagement to an aristocratic Englishwoman. This information Morse faithfully reported to the elder Thwing. They were all proud of Francis and seemed to think that the war would help him to mature. By good luck he survived reasonably intact, both physically and mentally.

Nan’s family became fully engaged in the conflict. One brother, G.F. Welsford, M.D. (Anne’s father), took charge of a Red Cross hospital
at Tiverton, Devon, while the other, Major A.G. Welsford, served as command- 
ner of the depot at Alexandria, Egypt. All three of Nan’s nephews joined 
the war effort, and one, Geoffrey, a Sandhurst graduate, died while flying. 
Hosea’s family apparently contributed only one member to battle, his 
nephew Bertie, who served with the New Zealand Expeditionary Force in 
France.39

Although Morse had completely lost track of Bertie by this time, 
the Great War touched him deeply for other reasons. Impressed by the way 
everyone, even the British colonies, rallied to the cause, Hosea wrote to 
Thwing on September 6, 1914: “I have never admired England so much.”40 
Indeed, early the next year he decided to become a British subject again, 
writing to his Nova Scotia relatives for proof of his original citizenship. In 
part this decision seems to have been motivated by Morse’s genuine admi-
 ration for Great Britain’s war effort. It was also probably abetted by his 
frustration over America’s slow entry into the conflict. Other factors may 
have been pride in the role Nan’s family played in the fighting and his 
sympathy over the loss of her nephew Geoffrey in battle. Anne Welsford 
believed, however, that Nan Morse “persuaded Uncle Hos to apply for 
British nationality.” In her view, he would not have taken such a step 
“without urging.” She maintained, in fact, that “Nan gave him no peace until 
he agreed to do so.” Although Mrs. Morse had been born in the United 
States, her parents were British, and she was, in Welsford’s words, “much 
annoyed at finding that officially she was American.”41

The war did more than simply provoke a shift in Morse’s national 
loyalties; it also revitalized his Christian faith. Although Anne Welsford 
could not recall the Morses ever talking about religion at home, and although 
Nan, baptized an Anglican-Episcopalian, never went to church, Morse did 
so—at least during the war.42 On October 4, 1914, he informed Thwing: 
“Just now I was interrupted and carried off by a friend to the Cadet’s Chapel 
(‘Sandhurst’ is in Camberley). I go there with her often and like the service, 
and now in war time it is particularly impressive; it closes always with ‘God 
Save the King,’ to the roll of drums and blare of trumpets and a rigid standing 
at attention which sends a thrill down the spine of a civilian, even of one to 
whom this personal loyalty is a source of wonder.”43 On December 24 
Morse wrote,

Just a word of greeting on this Christmas eve, and the hundredth 
anniversary of the treaty of Ghent; and on June 15th, 1814, William 
Ellery Channing delivered a discourse on the Goodness of God in
delivering the Christian World from Military Despotism; and now He is again occupied in again delivering it from the same evil; and in 2014 will again be at the same task. For the Devil still lives and, when thrust down in one place, rises in another. And this feeling is the atmosphere from which I hope that you and yours may have the peace of Christmas eve.44

Like a great number of his generation, Morse gave every evidence of trying to live in accordance with Christian morals, including charity. He was profoundly shocked by the stories of the Belgian refugees, and as early as October 1914 he succeeded in settling a widow, her grown daughter, and their servant in his Ewell house, which was then empty. With donations from Nan’s American cousins and their friends, and help from the Thwings, he found a rent-free house and in December settled a family of six in it—parents, three grown daughters, and a lame son.45 Soon thereafter he volunteered to teach French classes for British soldiers. On April 4, 1915, he reported, “Two days a week I take our teachers over to Blackdown, and two days we have a conversation class at my house. We started with 270 pupils, but they soon drop off discouraged because they cannot master the language in two lessons, and we have now about 70 of the more persistent. Only a dozen are of the advanced class.”46

Morse and Thwing corresponded often about the Great War, which preoccupied them intellectually as well as emotionally. Although Thwing was intrigued by the peace movement, Morse held a more cynical view: “I see,” he wrote in April 1915, “that so warm a supporter as Bryce enters a caveat that small and defenceless states must be protected.”47 From Morse’s standpoint, just as peaceful neighborhoods require police in the background to “repress the elements of lawlessness and disorder,” so there must be armed forces “to restrain the outbreaks of Attila, or Genghis Khan or Frederick or Napoleon.” “So long as Japan, and Timbuctoo, and Mexico, and Germany, and Mongolia combine to breed warriors,” he argued, “so long will it be incumbent on the peaceful ants to maintain warrior ants to guard the nest and to secure . . . their peaceful life.”48 At the same time Morse believed in a just peace with “reparations, restoration and guarantees” from the aggressor.49

To Morse, the Great War recalled the American Civil War. He repeatedly made the point that this was a battle against militarism and in favor of civilization, not against Germans—although feelings about the enemy were not so sanguine in less quiet corners of the country. Morse
showed particular interest in the social composition of Great Britain’s troops, noting that the new recruits were “for the most part... from all classes of society.” In mid-1916 he observed that the English were “pleased with the performance of [this] so-called ‘New Army,’ ” but also “a little surprised.” Their surprise, Morse noted with a certain amusement, reflected their ignorance of how well “volunteers” had done in the American Civil War, a fight that Prussian field commander Helmuth von Moltke “termed ‘a conflict of armed mobs.’”

Life at Arden

During the war years, from the end of 1914 onward, the Morses lived in Arden, a comfortable but austere two-story residence named after Shakespeare’s forest. About a ten-minute uphill walk from Camberley, the house had three large living rooms, a drawing room, a library, and a kitchen downstairs, as well as six bedrooms, a bathroom, and a lavatory upstairs. Eventually, in March 1918, the Morses bought the house, and the family occupied it until Nan Morse’s death in 1940, six years after Hosea died. As a child, Anne Welsford paid month-long visits to her aunt and uncle during the war and was a frequent visitor in the 1920s and 1930s. She describes Arden as “what an estate-agent would have called ‘a gentleman’s residence.’” It was not luxurious by present day standards. There was no central heating and my aunt, who suffered from neuralgia, would not allow large fires. During my uncle’s life-time there was gas lighting. Later my aunt quarrelled with the gas company, had the gas supply disconnected and used oil lamps. There was, of course, no electricity.”

“Most of the house,” Welsford recalled, “reflected my aunt’s taste and interests.” The one exception was the library, which was “aptly named, for bookcases lined the walls from floor to ceiling. This was the main living room. Here my uncle wrote and read, while my aunt occupied herself with sewing or her flower paintings.” Except for this room, “there was little to remind them of their long years in China.” But in the library, “two long complementary scrolls in Chinese characters caught the eye. There were two more in the hall. My uncle’s Chinese decorations were in a glass-fronted case by the fireplace.” This paucity of Chinese memorabilia contrasted strongly with H.F. Merrill’s home in Cambridge, Massachusetts.

The kitchen quarters were behind the library and the dining room. According to Anne Welsford, the Morses
always had a cook and housemaid living in. They must have paid quite good wages, for they managed to get staff although my aunt was not an easy mistress. At the corners of the house were water butts to collect the rain-water from the roof. This was boiled and strained, for my aunt insisted on having soft water for tea and all cooking purposes. . . . In the summer tea was sometimes brought out into the garden. This was a troublesome business requiring a table and chairs and a tray brought out by a maid from the kitchen. When more hot water was needed I was sent to ring the bell in the library, but the maid had to bring it out. I could not carry it, for, “You must not spoil the servants.” Whatever my uncle may have thought, like a wise man he held his peace.\textsuperscript{54}

The war naturally affected the lifestyles of everyone. On March 26, 1916, Morse reported to Thwing: “We are all going for thrift, reducing numbers of servants, cutting down table, wearing old clothes, and so on. We . . . consume no labor or supplies that we can avoid.” Up to this point in the conflict Hosea had not mentioned his writing projects. But in this letter he told Thwing, “I am enjoying Thayer’s ‘John Hay’—a delightful book with no small element of Thayer in it—I wish I could have seen the proofs of his chapter on China 1899–1900, as I could have corrected some minor errors; I shall find [there] valuable references for my chapter which I have next but one to write, on the negotiations of 1900–01.”\textsuperscript{55}

The following month Thwing arranged for a copy of William Roscoe Thayer’s \textit{Germany versus Civilization} to be sent to Morse, who acknowledged receipt on May 14: “It was very good of you to send me Thayer’s ‘Germany vs. Civilization.’ I am reading it with zest and thorough approval of its sentiments. It is clear and logical, and it expresses the feelings of those who do me the favor of writing to me. Will it affect the millions? It probably will not reach them, but its teaching must permeate and support the object lessons . . . [of the war]. I hope the book will have a wide circulation for it expresses truth, as all but the Germans see it.”\textsuperscript{56}

Early the next year Nan Morse informed the Thwings that her husband had completed the final two volumes of \textit{International Relations}. On February 6, 1917, President Thwing replied joyfully:

Mrs. Thwing and I have received the letters of Mrs. Morse which bear to us the blessed tidings of your having finished the manuscript of the great work. What a work it is, my dear Morse, to have done in these last years! What a severe master you are to yourself! You have the Puritan conscience, reinforced by vital experiences. I hope you will
undertake the printing of it at the earliest day. Putting the book through the press will tend to draw feeling away from the crises of war. Of course, you do not want the feeling drawn away. You insist upon placing it upon the crises. Nevertheless I think you ought.\textsuperscript{57}

In November 1917, reacting to "insistent demands" that Morse’s monumental study "should not be postponed," his publishers, Longmans, Green, began sending proofs of volumes 2 and 3, titled \textit{The Period of Submission, 1861–1893} and \textit{The Period of Subjection, 1894–1911}. Thwing, ever supportive, responded to the news: "I rejoice, with very deep rejoicing, in your reading proofs. These books, my dear Morse, are not only great in themselves, but they are a worthy crown of your great service. Like Caesar, you are the interpreter of events in which you have had some part, especially in their effect upon modern civilization."\textsuperscript{58}

Morse was not one to rest on his laurels, however. Soon after his "two fat volumes" appeared in print (October 1918), he announced to Thwing that he was "now engaged on an historical novel bringing in as the principal characters [Frederick Townsend] Ward and [Charles] Gordon" who fought against the Taiping rebels during the 1860s.\textsuperscript{59} This novel, eventually published under the title \textit{In the Days of the Taipings}, evolved naturally out of the material Morse had used for volume 2 of \textit{International Relations}, in which he devoted nearly fifty pages to the fascinating exploits of these two flamboyant commanders of the so-called Ever-Victorious Army.\textsuperscript{60} Although \textit{In the Days of the Taipings} does not meet a particularly high literary standard, it manages to portray the viewpoints of both foreigners and Chinese with considerable insight and sensitivity.

Morse had not, of course, abandoned scholarship in favor of historical fiction. In fact, he became so encumbered with academic writing projects and other scholarly obligations during the next few years that his novel did not see the light of day until 1927. As a member of groups such as the Council of the Royal Asiatic Society, the Committee of the China Association, and the Royal Societies Club, Morse not only attended innumerable meetings and conferences, but he also gave lectures, published articles, reviewed books, and read unpublished manuscripts for friends and scholarly organizations. Naturally enough, his productivity peaked when he enjoyed good health; and during the late teens and early twenties he usually reported "being well and feeling young," "I do some gardening every day," he wrote enthusiastically on May 2, 1920, "and that keeps me in good
condition physically. Altogether I am idly busy all the time, and I am a year stronger each year.”

In 1920 Morse traveled to Brussels as “the expert on China’s delegation to the Economics and Financial Conference of the League of Nations.” For this latter service, and in recognition of his “invaluable help,” Morse received the prestigious Order of the Excellent Crop (Chia-ho chang), second rank (out of nine). The Chinese asked him to consult again in 1921, but his health precluded a trip to Washington for this purpose; in any case, as he later told Thwing, “I am not in sympathy with the extreme pretensions of the Chinese delegation.” Meanwhile, Morse managed to produce a third edition of Trade and Administration in 1921 and to write a long section on economics and finance for a planned volume on China to be included in a Hodder and Stoughton series called Nations of Today. The latter volume was never published, however. Much later Morse, with characteristic generosity, gave John Fairbank permission to use this draft “anonymously” if he wished.

**Chronicling the East India Company**

Morse’s most ambitious scholarly undertaking of the postwar period was a massive documentary study of the British East India Company’s activities in China. As early as December 14, 1919, Morse mentioned casually to Thwing that he was “planning a new book on the trade at Canton from 1700–1834”—if he could “be allowed to bring home the India Office records which will form my base.” Luckily for Morse, he was able to do so; the authorities at the office recognized his unique qualifications and permitted him to go through the ledgers and record books at home, one at a time. As Morse noted in a letter of May 2, 1920, “So far I have disembowelled 5 volumes (there are 198 in all); and I have written over 30,000 words, all condensed writing. I may have to write it all twice over, once from the MS. records, once from my own first draft.” By the summer of 1922 Morse could report:

I am now at 1815, and shall close vol. III at 1816 and the Amherst Embassy to Peking. Then vol. IV will cover the ground 1817 to 1833. My work will be [of] special value to the economist, from the care I take in extracting trade particulars; but even in the political field I have had to recast my opinions. Do you know of any of the managers of the Harvard University Press? I wonder if they will publish the work when
it is completed. It will appeal to the historical student more than to the [general] reader, and its publisher will have to look to the libraries more than to private individuals. 68

Work on The Chronicles of the East India Company, Trading to China, 1635–1834 came to an abrupt halt in the spring of 1924—but for a joyous reason: Morse traveled to Harvard to receive an honorary Doctor of Laws degree from his beloved alma mater at his fiftieth reunion. Thwing initiated and pushed the event from behind the scenes (“Morse knows nothing of my thought,” he claimed). 69 Hosea’s mentor, E.B. Drew, who had recruited him for the Customs and had retired in Rome, Italy, and Cambridge, Massachusetts, and Morse’s classmate and China colleague H.F. Merrill, who boasted many Harvard contacts, both eagerly collaborated with Thwing. The twenty-eight letters in the Thwing Collection running from October 1923 to March 1924 indicate the zeal with which Thwing and Merrill relentlessly maintained pressure on President A. Lawrence Lowell, the university’s governing boards, and the appropriate individuals and committees.

Drew and Merrill had nothing but praise for their longtime friend and associate. Drew wrote to Thwing from Rome in December 1923:

Morse went to China in 1874 straight from taking the B.A. Degree at Harvard. . . . Fifty years of . . . devoted and intelligent study carried on unremittingly and under very favorable conditions (employment all over China in the Chinese Civil Service) have shown enduring visible results. . . . Morse stands today, as the greatest authority on the large topics concerning China . . . [which are] the enduring products of this long career of official experience and of thorough study. The only names I can recall which rank in the same category, tho’ in other fields of Sinology, are James Legge, Dr. S. Wells Williams, H.A. Giles, and Edouard Chavannes. Morse’s “International Relations” will long stand as the fundamental authority within its own sphere; no other book can touch it in the English Language. It is these achievements in scholarship, added to a long and honorable career in the public service of a great friendly nation, which convince me that Harvard might well distinguish handsomely this one of her sons of fifty faithful years. 70

H.F. Merrill, Morse’s closest Customs competitor, added his voice to the chorus of praise: “Of course Morse’s books must be our chief argument; but reference might be made to his excellent work in the Service
of the Chinese Government, especially in the development and improve­ment of the Bureau of Statistics—and also to activity and prominence in learned Societies in matters connected with the Far East. He lectures frequently before such societies in England—and his talks have a broader range, sometimes than their designation would lead one to expect.”71 Thwing, for his part, understood how much it all meant to Morse. On November 14, 1923, he confided to Merrill: “I think he once said to me, ‘I would creep on my hands and knees from England to America, to get a Harvard LL.D.’ Blessings on the dear man.”72

With such devoted and enthusiastic support, Morse became the member of his class singled out for appropriate honor at the fiftieth reunion, and so he stood first among his surviving classmates. His career had begun at Harvard, and now he was honored there; to Hosea it was doubtless the crowning achievement of his life. President Lowell’s citation provided a summary judgment of Morse’s work: “Offered, on graduation here, a career in a foreign land, he rose to the highest distinction in the Chinese Customs Service. Notable authority on the nation that he served so long.”73 C.A.V. Bowra, then Customs nonresident secretary, sent a dispatch about Morse’s honor to the current inspector-general, F.A. Aglen, who included it with his own circular to all the commissioners.

At this time Morse, who continued to smoke until about five years before his death, was regaining strength from a debilitating winter bout of bronchitis or pneumonia. Soon after receiving his honorary degree, he wrote to Thwing from Boston: “I have been ill and have not written my own letters for some time.” Nonetheless, he was able to report that he “got the MS. of my book [the Chronicles], 4 vols., in to the publisher’s hands just three days before I was taken ill. This is about the fifth private letter written with my own hand since the New Year.”74 By October 1924 he had recovered sufficiently to devote his energies to proofreading and indexing the Chronicles, and by late November he could announce: “My history is getting ready. I have just finished proofs of two (out of four) volumes, and have reason to hope that it may be out by next spring.”75

This was not to be the case, however. Poor health returned, imped­ing the process of proofreading and forcing Morse to curtail many other activities as well. He stopped going into London for meetings and other purposes and no longer went out after sunset.76 He had to resign from the Council of the Royal Asiatic Society and from committee duty at the University of London, and he was also obliged to give up the local Shake­speare Society, of which he had been “the guiding spirit.”77 Meanwhile, the
arduous task of making final revisions, preparing, binding, and issuing four volumes totaling about sixteen hundred pages, not to mention unanticipated problems such as a porters’ strike in the publishing trade, further delayed production.  

Finally, on April 26, 1926, Morse could tell Thwing, who by this time had retired as president of Western Reserve University, “My book is launched, and is well received. I hope you will have received your copy ere this. And I too am now Emeritus and my weapon is now the wooden sword.” Although Morse claimed to be pleased with the volumes’ initial reception, in July he remained anxious over the absence of “American press notices up to this date.” Positive reviews had come in from England, India, and China, he said, “but none yet from America.” Morse then permitted himself a rare moment of self-congratulation: “[O]ne of my friends writes to me that the book has been a veritable gold-mine to him: he has contributed reviews of it to two weeklies, two monthlies and a quarterly.” Morse dedicated his monumental four-volume work “To the memory of Edward B. Drew with grateful recollection of our friendship of fifty years.” But he also obviously appreciated Thwing’s loyalty and support, and he graciously arranged for a copy of the Chronicles to be sent to him “in humble recognition of the many merits which I may admire but cannot hope to imitate, and as a mark of my sense of your many kindnesses. Make the most of this, for then I shall have written myself out. We write with one voice to send you both our best love.”

As events unfolded, the discovery of additional East India Company records in the British Legation in Peking provided Morse with material for a fifth volume, which he completed about two years after the first four. On March 11, 1928, he told Thwing that this new material allowed him “to fill an eighteenth century gap (of three decades),” adding that “now I really have finished with the writing of books.”

Morse’s Last Years

Morse found substantial enjoyment in the twilight of his life. He relished discussions of scholarship and politics with neighbors and took special pleasure in visits from longtime friends. Merrill dropped in once or twice on his way to visit his daughter (who was married to a Customs officer in China), and Dana never failed to look Hosea up during his yearly sojourns in England. Nan’s relatives, including Dora and Henry Pancoast, also occasionally made their way to Arden. When Nan’s niece Anne Welsford
began studying at Cambridge University, Hosea took a particular interest in her life and became an adopted uncle to her three roommates. His letters to Anne, then known as "Anon," were affectionate, playful, and reminiscent. She later speculated that "it was my youth which pleased him the most. He was always young at heart."  

Nan Morse seems to have maintained several close relationships at Camberley, despite her erratic personality and "ungovernable fits of passion."  

According to Anne Welsford, "My aunt had a number of elderly friends, Miss Keightley & Miss Chaplin, Mrs. Michelmore & her daughter, Miss Jameson and others. When my mother was staying at 'Arden' she liked to send her round to call on them with little bunches of flowers. Otherwise they came to her. She [Nan] didn't go out much because she . . . [suffered from] ill health."  

It is doubtful that any of Hosea's Chinese acquaintances came to call. Certainly we have no record of such a visit. Nan remained hostile to the Chinese until her death and, Anne Welsford said, "would not have welcomed a Chinaman at 'Arden.'"  

Although Morse seems to have been perfectly content to spend the last two decades of his life as a British subject living in England, he nonetheless reached out to confirm his American heritage near the end. In 1929, for instance, he became a corresponding member of the Colonial Society of Massachusetts. This was not a pro forma matter, however. In fact, it required a long letter of explanation as to why neither he nor his wife had birth certificates. Eventually things worked out, and in accepting his membership Morse took pains to express his "sense of the honour which has been conferred upon me and my acceptance of it."  

During the last ten years of his life Morse did not write as frequently to his longtime friend Charles F. Thwing as he had done earlier. Still, he valued Thwing's letters—in part, no doubt, because Thwing so thoroughly and obviously appreciated Hosea's scholarly talents. In two particularly revealing letters, Morse provides us with a rare description of his approach to the writing of history. The first is dated October 11, 1925. "In my history," he says, "I tried to give a plain narrative of the absolute facts, such that, by judicious selection, both sides could find ammunition for their causes—for no cause was ever so bad that there was nothing to be said in its favour . . . I am no good as a prophet: I follow the maxim—'never prophesy unless you know'; and the ordinary American audience wants to know, not what happened yesterday, but what is going to happen tomorrow; they seem unwilling to make the mental exertion to judge tomorrow by yesterday."  

Three and a half years later, on April 25, 1929, we find Morse
responding to one of Thwing’s letters of praise. He begins with characteristic modesty: “You are too generous in your comments on my writings. My only merit is that I saw a field which had not been properly cultivated and I stepped in and plowed deeper.” Then he offers a cogent analysis of the impact of his scholarly work:

Now that my job is finished I find myself confronted with two opposing influences. One is the extreme nationalist view and its upholders: my history of the last century was written without bias and as a contribution to serious history, without many adjectives or epithets. This does not meet the views of the nationalists, and they have put on the “index” a condensation by MacNair of my three volumes, brought down by him to 1928. An edition of 1000 has been withdrawn and suppressed on demand of the students and the government. MacNair knows China well and has the historian’s mind; he was a long time at St. John’s (Shanghai) and is now at the Univ. of Chicago. He refuses to budge and so do I.

“The other influence,” Morse goes on to say, “wishes to dig deeper than I have done. From a friend I have received an intimation that the Harvard Business School will apply for my help in securing records of trade at Canton in the early days. For the English trade all surviving records are in the India Office, available for students working there. I know of no others, but those I have studied very thoroughly, and I have had the student of economics and finance constantly in mind; he will find much information in my five volumes 1635–1834 with the aid of the index.”

It was, of course, Morse’s reputation as a talented and objective China scholar that drew John Fairbank to become his disciple as a Rhodes Scholar in 1930. He often visited Morse and appreciated his guidance and expertise. After Fairbank went to China, they continued an affectionate correspondence until Hosea’s death from pneumonia on February 13, 1934.

Morse’s demise brought expressions of sympathy and testimonials of praise from all parts of the world. When Hosea’s niece Janet heard that he had died, she wrote her estranged aunt a long and generous letter, which read in part:

It is hard to express in mere words how very deeply I sympathize with you. I know you meant a great deal to each other and life for either of you without the other must be hard to contemplate. . . . I feel a great sense of loss too for no one could have received better care and attention
than you and Uncle gave me and I am not ungrateful though I may have appeared so. I have thought of you both more than you could imagine. I have told my children about Uncle Hose [sic] what a wonderful man he was, and how they could wish for nothing better than that they could be like him.\(^{91}\)

Nan, who apparently never answered the letter directly, died six years later.\(^{92}\)

On Sunday, February 25, 1934, John Fairbank wrote the following obituary notice for the editorial page of the *Peiping Chronicle*:

The death of Dr. Hosea Ballou Morse, announced on February 20, marked the passing of an historian of the rarest calibre, the preeminent value of whose work is only beginning to be generally appreciated.

“The International Relations of the Chinese Empire” has long been accepted as a standard work, remarkable for its breadth of scope and accuracy of detail, and indispensable in a field of history in which only the main outlines of historical fact are as yet known. But it may be questioned if many readers, among the thousands who have used these volumes for constant reference, have realized the intellectual triumph which they represent or the romance which lies behind their many footnotes.

The fact is that Dr. Morse lived through two full and crowded careers, each of them a life of achievement in itself. For thirty-five years, from 1874 to 1908, he served under Sir Robert Hart in the Chinese Maritime Customs, playing an active and trusted part in the building up of the Service and contributing to the development of modern China. For a score of years thereafter, changing from the making to the writing of history, he did again the work of a pioneer. With persistent industry in the face of precarious health, and with an insight born of rich experience, he was able to weave from the many and tangled threads of Tsing [Ch’ing] Dynasty foreign relations a masterpiece of historical writing. In doing so he advanced by many years, perhaps by decades, the study of modern Chinese history.

Such an achievement was possible because of the complete accuracy and personal impartiality of the writer’s mind. The same desire for established fact which made Dr. Morse invaluable as a Statistical Secretary made him preeminent as an historian. Revision and correction of his work, of the imperfection of which he was all too humbly aware, will continue from year to year, together with the elaboration of subjects which he only touched upon in passing. But it may safely be
said that such revision will be made only in the light of newly accessible materials or of the conceptions and judgements of a new generation, and this in itself is the highest praise. “The Chronicles of the East India Company Trading to China” are likewise an indispensable foundation for the student of modern China to build upon in years to come.

The story of Dr. Morse’s own part in the making of history should contribute eventually to the amplification of his own historical work. How Commissioner E.B. Drew on behalf of Robert Hart selected four men from the Harvard class of 1874 and shortly after their graduation sent them to China to carve out careers in the infant Service; how one of them, Mr. H.F. Merrill, now of Boston, for several crucial years controlled the customs service of Corea and struggled with a rising deputy of Li Hung-chang named Yuan Shih-kai; how the other two, Messrs. Clarke and Spinney, served the Chinese Government in various posts and provinces,—all this forms one of the unexplored annals of the Chinese Maritime Customs. Dr. Morse himself saw service in Shanghai, Tientsin, and Peking, in England, where he married, at Pakhoi, at Tamsui during the time of the Japanese invasion and the short life of the Formosan Republic, at Lungchow, and at Hankow during the opening of Hunan to foreign trade, which was done under his direction.

That he was able thus to take active part in a complex period of history and later, with the touch of a master, to write the notable comprehensive account of it, is an achievement of the first magnitude.93
The historian’s work is not immutable. Each generation’s interest in the past will be met by its own historians updating the record to meet the interests of their own day. Many contributions are therefore superseded and buried under layers of later writings. The accepted last word of one day becomes the outdated and passé work of a later time. Parts of a work may be incorporated into the accepted “facts” of history, while other aspects of it are marked for “revision,” to be challenged or improved upon. Because the significance of an event at any given time is in the eye of the beholder (or the imagination of the reader), we have no absolute standard by which to evaluate H.B. Morse’s writings. On the other hand, a comparison of his account of late imperial China with accounts written later may help us to measure the flow of progress in the art of history as well as in the grasp of it by the history-conscious public.¹

**Academic Perspectives**

Let us take Morse’s last project first; it is the least interpretive of his major works and therefore does not tell us much about his point of view. Precisely for this reason, and also because of its rich documentary content, *The Chronicles of the East India Company, Trading to China, 1635–1834* in five volumes became Morse’s most enduring work. Summarizing the record of Britain’s Old China trade to 1834 was a stupendous task, not least because it involved mastery of two hundred or so musty volumes in the India Office Library. No one else had Morse’s background knowledge of the Chinese institutional practices and the British commercial methods that such an investigation required. The India
Office recognized his unique qualifications by permitting him to use the ledgers and record books.

Morse himself remarked that the *Chronicles* would far outlast everything else he had written. One look at these volumes will establish his point. They are an epitome of the personnel, facts, and figures of the British East India Company's Canton trade, together with quotations from key documents, summaries of events, and obiter dicta of explanation that only an expert could supply. Morse's preface states, "From these records every fact has been extracted which could be of economic value to the student of the commercial history of the eighteenth and early nineteenth centuries." Even today, many studies of institutions, policies, shipping, and trade flows are still to be drawn from this distillate of evidence. One charm of these volumes is in Morse's succinct summaries of the many altercations that arose between the East India Company officers at Canton and the Chinese establishment of hong merchants and high officials. Though confined to Canton, this work amounts to a diplomatic history of the pretreaty period.

*The Trade and Administration of the Chinese Empire*, Morse's first major work, presents a rather odd pastiche. The author was identified as "A.B. Harvard, Member of the Royal Asiatic Society, England, Commissioner of Customs and Statistical Secretary, Inspectorate General of Customs, China." The dedication read: "Thirty-three years ago four young men came to China direct from the halls of Fair Harvard. To the other three the fourth dedicates this work." Two things immediately strike us: Harvard is still home, though England and China also figure, and the four classmates are still a peer group in which the author has won out as the first to publish.

The author's preface to *Trade and Administration* showed him to be both history-conscious and pro-reform:

This book is intended to portray the present state of the Chinese Empire, with such record of the past as will show by what process of evolution the existing state has been reached. No attempt is made to forecast the future, or even to refer to the revolution which, under the name of Reform, has been begun. . . . [The] China of that future day, near or distant, will not be the China of today. Whether this revolution will follow the precedent of the English Revolution or of the French, whether it will proceed by logical development from step to step, or will rush on a headlong course, will depend upon the wisdom and self-restraint of the leaders in the government, and in the last resort upon the nature of that public opinion which will be created in the
Chinese people. . . . [To] understand the China which the student of the future will know, . . . [one] must be able to study its past. The China of today is, with minor differences, the China of the past; and in this book it is hoped that the future student will find, within the limits of the dozen subjects treated, a succinct account of the foundation on which the China of the future will be erected.

For reasons that are not entirely clear (but probably related to long-standing ties of friendship and shared activities in the NCBRAS and other organizations), the first two chapters summarizing China's history were written by the Reverend Francis Lister Hawks Pott, president of St. John's College, Shanghai, since 1886. He was a worthy missionary educator and college builder, but in no sense was he a research-based historian. His "Sketch of Chinese History from Early Times to [the] Beginning of Foreign Relations" is superficial and conveys the implicit message that aside from European contact China's experiences with other peoples were beneath notice.

Morse's own chapter 3 in thirty-four pages outlines the basic structure of China's central and provincial government during the Ch'ing period. The treatment is solid as far as it goes. The author does not, however, discuss the civil service examination system that yielded the vast majority of Chinese officials, and he refers only briefly to China's local "democracy." His description of the bureaucratic politics that balanced Li Hung-chang's forces against those of Tso Tsung-t'ang in the 1870s and 1880s oversimplifies a complex picture of Ch'ing factional struggles, but it makes an important point about regional differences and provincial rivalries.

"Revenue and Expenditure" in thirty-eight pages acknowledges help from the studies of E.H. Parker and George Jamieson. It cites numerous statistics of revenue reported to the central government and tries to estimate the probable amounts behind the paltry facade. This chapter is more an account of inadequacies in knowledge than of the reliability of available data. Morse, like other analysts of Chinese finance, came to the conclusion that the real collection of revenue from the Chinese public scene was many times the amount finally reported at Peking.

The next chapter, on currency, summarizes the story of diversity and confusion that Morse had already worked out and published in the NCBRAS journal for 1906–7. This picture of cumulative and agreed-upon chaos supported the current demand for currency reform. The subject had received wide attention as a result of Cornell professor Jeremiah W. Jenks's

In chapter 7, first produced as an article for the *Atlantic Monthly* of November 1906, Morse gives an admirably clear exposition of extraterritoriality. Here appears the "official myth," the raison d'etre, of the treaty system: in brief, the unequal treaties rescued the foreigner in China from the evils of the Canton system. Like the New Deal recovery from the Great Depression of the 1930s in the United States (which the Democrats used to lambast the Republicans), this became a story of salvation. The Canton factories had been a medieval ghetto inimical to the modern Western principles of free trade and personal freedom under law. Morse made plain how the foreigners' privileged position in China under the treaties had hung by the thread of extraterritoriality ever since the 1840s. With his usual eye for vices as well as virtues, he also illustrated the great inadequacies of the system.

Then followed a graphic survey of the provinces and the treaty ports that provided a great deal of firsthand information on geography, trade routes, and production obtainable only by someone on the spot. Morse was, of course, drawing not only upon his own experience but also upon Customs records and especially the *Decennial Reports* from the various Customs offices. Chapters on foreign trade and internal trade were followed by a chapter on the opium question in general—its facts, not its moral standing. Just as the revenue chapter met the current interest in China's ability to pay large debts and indemnities to the imperialist powers, so the opium chapter estimated the extensive opium production in many parts of China that far outweighed the declining import from India. "Native opium" had always been an interest of the Customs. The final chapters concerned the inspectorate general of customs and its functions, and the post office run at first by the Customs Service.

On publication in 1908, *The Trade and Administration of the Chinese Empire* was recognized as the most solid and authoritative work available on the subjects covered. A second edition, with a slightly different title, came out in 1913, and a third in 1921. A chapter on the republican government and one on the growth of railways were added in the third edition. The hard data and sophistication offered in *Trade and Administration* were invaluable as well as reliable for the students of that time. It was not, however, a history, except in bits and pieces.
Morse’s book *The Gilds of China: With an Account of the Gild Merchant or Co-hong of Canton* (1909) was also more descriptive than historical, although it offered an illuminating comparison between Chinese and medieval English guilds. For his picture of English guilds, Morse used three recently published volumes—one by W.J. Ashley, *An Introduction to English Economic History and Theory* (1906), another by George Unwin, *The Gilds and Companies of London* (1908), and a third by Henry Atton and Henry H. Holland, *The King’s Customs* (1908). Perhaps the timely publication of these works inspired Morse’s comparative effort. On the Chinese side, Morse drew upon an article by his friend the American medical missionary Dr. Daniel J. Macgowan, “Chinese Guilds or Chambers of Commerce and Trade Unions,” which appeared in the *Journal of the North China Branch of the Royal Asiatic Society* in 1887. Morse’s preface remarks that “it is an honor to follow in the steps of this cheery and hardworking sinologue.”

Following Macgowan, and based on his own experience in several ports, Morse distinguished between trade guilds, which dealt in the various commodities of China’s commercial centers, and “provincial clubs” or *hui-kuan*, which Macgowan called *Landsmannschaften*, a German term picked up more recently by Professor Ho Ping-ti. From a comparative standpoint Morse notes that the guilds in England came under the rule of law and received their charters from the authorities, whereas in China they grew up and existed more or less independent from local officials. This difference meant that Chinese merchants could not turn to a very high authority—if any—if they were accused of causing trouble. On the other hand, Chinese guilds as collective groups could bring pressure to bear on the community. Morse attributes this phenomenon to a Chinese type of “democracy,” although he also acknowledges that the local authorities could always intervene at their own discretion in guild affairs.

The last half of Morse’s book is devoted to systematic comparisons between certain specific Western guild organizations, such as the steelyard merchants of the Hanseatic League in London and their Chinese counterparts, including Newchwang’s “Great Gild,” the “Swatow Gild,” and the Canton Co-hong. Morse’s implicit assumption is that the guilds of medieval Europe and of China were conjugate institutions that met similar needs in roughly similar ways. This assumes the common though not always stated idea that world trade far antedated the rise of historical studies of it. Marco Polo was unusual not because he traded to China but because he talked about it in literate circles. The ancient but largely unrecorded contact between
merchants of Europe and Asia, though much of it was indirect through intermediaries, had resulted in comparable problems and the devising of similar solutions. The implication, then, was that mankind had been living in one world for a long time. Morse’s small volume served as a general introduction to a large topic that Japanese researchers like Negishi Tadashi would greatly enlarge a generation later.

Of all Morse’s works, *The International Relations of the Chinese Empire*, published in three volumes between 1910 and 1918, is in many respects the most interesting. In part this is because the author figured in much of the history he describes. Morse, however, remained modest about his achievement. On September 22, 1932, he wrote to me: “You say nice things of my history but I am fully aware that in dealing with a century of history in 1500 pages I left much to later writers who should cover the skeleton with flesh by filling various periods with detail.”

To see Morse’s magnum opus in proper perspective, we should note the “state of the art” of modern Chinese history at that time. Ever since 1900 Western writers on China had been transfixed by the xenophobic horrors of the Boxer Uprising and the origins of this movement in the cultural incompatibility of East and West. One writer of erudition and imagination was E.H. Parker. He had been briefly in the British Consular Service in China and in 1892–93 had served as an adviser to the British government in Burma. He had studied Chinese and was aware of Jesuit works, and of Edouard Chavannes’s translation into French of the first dynastic history, the *Shih-chi* (Historical Records) of Ssu-ma Ch’ien. In 1901 Parker published *China: Her History, Diplomacy and Commerce from the Earliest Times to the Present Day*. This work is interesting to read, full of the facts of geography, identifications of the numerous tribal peoples surrounding China, and a great deal of historical lore. But it is still a rather garrulous and at times supercilious work of sinology—all about China, yet not history, not what essentially happened there.

Another British writer of Anglo-Chinese history was the journalist Alexander Michie, who published in 1900 in two volumes *The Englishman in China during the Victorian Era as Illustrated in the Career of Sir Rutherford Alcock, KCB, DCL, Many Years Consul and Minister in China and Japan*. Using Alcock’s career as a thread, Michie surveyed the events of Anglo-Chinese relations as a British success story meriting high praise. It is a distinctly Shanghai-minded narrative. Like Parker, Michie offered few footnotes but a good deal of the conventional wisdom of the day.

Closer to Morse’s interest was the three-volume *Relations de la
Morse as Historian

Chine avec les Puissances Occidentales of 1901–2 by Henri Cordier. Cordier’s work was well documented, particularly from French archival sources, but it offered little analysis or generalization. Morse was after something different—a carefully documented narrative that would provide a solid factual basis for historical understanding by those seeking it. By the 1900s it seemed to many Chinese and Western observers that the “opening” of China to foreign contact through the opium trade and warfare and the imposition of the unequal treaty system added up to a story of injustice. Morse had seen the story unfolding firsthand and was not disposed to pass moral judgment. Instead, he wanted to set the record straight and let the reader see in what ways each side contributed to what happened. As a result, the first volume of the International Relations was a history at quite a different level of skill and sophistication from anything Morse or others had done before.

The first volume, The Period of Conflict, 1834–1860, relied less on Cordier’s Relations than on some of the other Western works on China that Cordier had so ably collected in the NCBRAS library in Shanghai, together with the British Parliamentary Papers, the North China Herald, and various documentary materials gathered in the course of Morse’s Customs career. It had twenty-six chapters, more than six hundred numbered sections, more than a thousand footnotes, and twenty-four appendices, all of which added up to a massive feat of writing. But its real value rested in the thoughtful division of subject matter, the informed judgment expressed in paragraph after paragraph, and the crisp Latin style of summary and pronouncement. It dealt at length with the opium question, picturing clearly for the reader the motives and activities of Western traders and officials as well as the Ch’ing government’s policies. From this account readers could make their own selections of events and arguments. To be sure, the author’s insightful comments gave them guidance, but Morse’s aim, as stated in his prefatory note, was to present events only “in the light of history.”

Morse’s use of Ch’ing documents was certainly not what we have come to expect from more modern scholars. For evidence from the Chinese side he tells us that the pages of the Chinese Repository contain “translations of many of the Chinese state documents of the period, and we may assume that access to the original records would give us but little further light on the subject.” This complacency about the documentary basis of The Period of Conflict has been decried by later historians who have used the extensive Chinese documentation made available from the Chinese archives in the 1930s and later. Yet the main points of Morse’s volume have not been
overturned. For example, the thorough study by Hsin-pao Chang, *Commissioner Lin and the Opium War* (1964), vastly enlarges our understanding of the Chinese side of the opium question as well as the foreign side, but it does not invalidate Morse’s general conclusions.

**The Limitations of Morse’s Approach**

This is not to say that Morse’s trilogy lacks defects. Going through the first volume some eighty years after its publication (and sixty years after first perusing it), I note immediately that the chapter on Ch’ing government, while full of material on the various officials that a customs commissioner had to deal with, provides almost no information on the scholar-gentry class that qualified for bureaucratic status by scholarship and lived by the written word. This class produced the mountains of essays, gazetteers, poetry, collected works, and other forms of Chinese literature now enshrined in our libraries. No foreigners participated in this world, and only a few, mainly missionaries, were even aware of it. Morse’s generation knew of the Confucian classics and Ch’ing documents, but only as outsiders.

Consequently Morse generally neglects the examination system and the class of degree-holders produced by it. Nor does his account of provincial government refer to the educational commissioners who were regularly dispatched from Peking to oversee the examinations. For the most part he fails to discuss the role of scholars as bureaucrats, their access to the throne through written memorials, and their functioning as members of the elite group that largely represented what there was of a public opinion within the Ch’ing Empire as a whole. As a result, Morse’s portrait of the imperial government in its last years is strong on its shortcomings and the debilitating effects of favoritism and corruption. He records the criticisms of government censors but gives little indication of the more positive side of the Confucian tradition, including its effort to maintain ideals of loyalty and public service, and its capacity for reform.

In his account of Ch’ing local government and the functions of the county magistrate and of the local headman (*ti-pao*) in the village, Morse remarks more than once that Chinese government was highly autocratic in form yet it coexisted with a rough kind of “democracy” at the local level. But what sort of democracy was it? Studies of the last generation have stressed the particularly consensual nature of the local community. Far from being a free individual, as one might infer, the villager in China was always part of a group, which was likely to penalize any deviance from its consen-
sus. The Chinese type of “democracy” that Morse perceived in the village was not at all the New England town meeting variety. The group's tyranny over the individual—like the family's control of its members and the general subjugation of women and youth in traditional China—has been more fully revealed and documented since Morse's day.

These limitations affecting Morse's work as a historian began with circumstance. In the first place, the Ch'ing officials with whom he dealt during his Customs career were either too busy or too reticent to discuss with him the history they were witnessing and making. Second, the modern Chinese student class, which eventually yielded a number of first-rate historians, was only beginning to appear when Morse wrote much of his history. Peking University, although it existed as of 1901, continued for more than a decade to train Chinese to be minor bureaucrats in the old style. The missionary schools of the early twentieth century, which later coalesced to form Christian colleges, still mainly operated at the level of secondary education. Chinese were not allowed in the Shanghai Club, nor were they members of the North China Branch of the Royal Asiatic Society. The treaty ports were still a semicolonial world divided both socially and intellectually between foreigners and “natives.” There was no one that Morse could talk to about the Chinese history he was writing.

After Morse left China he became even more isolated from the Chinese, no doubt in part because of his wife's strong prejudices. The result was that Morse was flying on one wing compared with later scholars, who could work closely with and learn greatly from modern Chinese colleagues. The friendly contacts between Chinese and foreign scholars of the twentieth century relate not only to sources and bibliographies but also to the human dimension of understanding society and values. In the lives of modern scholars of Chinese studies, the roles of “foreign friends” and “Chinese friends” have been plainly identifiable and multifarious. American studies of China have been greatly enriched by the participation of Chinese as professors in the United States. Important and lasting friendships have resulted from this contact. The Sino-foreign personal and intellectual relations of today are vastly different from those of a century ago.

Of course it is also important to note that Chinese historical documentation and writing on the nineteenth century were quite scarce in Morse’s time. For instance, the imperial documents selected for a secret record of China’s foreign relations were not declassified and published until the 1930s. Chinese memoirs, essays, and documentation remained thin and scattered even for Chinese scholars. Morse had little if any access to such
collections. Accordingly, *The International Relations of the Chinese Empire* had to be put together from the foreign side of the record. As the most comprehensive single study up to that time (or since), the three volumes had as their objective first of all to establish chronology and try to get the story accurate and consistent.

What was Morse’s aim in his survey of late Ch’ing foreign relations? At first glance it seems to have been to document the foreign invasion of China in the nineteenth century up to the collapse of the Ch’ing dynasty in 1912. For this purpose his preparation was remarkably good. He had had to understand and apply the intricate system of treaty rights and arrangements throughout his career as a Customs official. He was in Shanghai during the negotiation of the Chefoo Convention of 1876, the third major Anglo-Chinese settlement after 1842–43 and 1858–60. The application of foreign military force and the pressure of gunboats were only the rudimentary part of the story. Essentially it was an account of administration—how the foreigners built up their trade and their establishments in the treaty ports, how they demanded ever more access to Chinese goods that might be traded and souls that might be saved. The primary institution in the story after 1860 was the Imperial Maritime Customs Service. Morse’s plan for volumes 2 and 3 had been to use the journals of Robert Hart as a central thread, and for this Hart had given his permission. When access was later denied by Hart’s family, Morse collected several hundred pages of letters from Hart to his commissioners and went ahead. The merits of the resulting volumes of the *International Relations* seem plain enough if one considers how modern historians would have got along without them as works of reference.

Yet dwarfing all the foreign wars and treaties and native rebellions that plagued the Chinese state in the nineteenth century, the long decline of Ch’ing power and the dynasty’s incapacity to save itself are what Morse sees as his central drama. He concludes that the period of conflict up to 1860 obliged Peking to face the modern world on Western terms but the period of submission from 1861 to 1893 represented a lost opportunity. During three decades of comparative peace internationally and domestically, the old political order in China proved quite unable to pull itself together, to confront the new realities as the Japanese were doing, and to initiate modern reforms that would help the Chinese state to command its own future. Instead, the Ch’ing establishment, including both the dynasty and the scholar-official class, refused time after time to make changes that bystanders thought were obviously needed. The three decades of the period of
submission were squandered. These were followed by the two decades of
the period of subjection, which led to the collapse of the old order.

Morse saw this high drama in terms that were both personal and
administrative. Social Darwinism, the struggle for survival among nations,
was accepted as one of the laws of progress, but the theory of imperialism
had not yet provided a context for international events. Meanwhile the story
of Ch’ing administrative failure was all too evident to Morse as a participant
in the work of the Maritime Customs Service. Time after time high officials
and low showed themselves to be corrupt and self-seeking rather than
patriotic. Time after time the people in power proved unable or unwilling
to use their authority for drastic improvement. The picture presented to
Morse was simply that the members of the Ch’ing establishment, for all
their energy and capacity, lacked an ideal of national service and popular
betterment and instead pursued selfish and narrow ends. Behind this nar­
rowness of view and meanness of ambition lay a lack of education in the
realities of the modern world. Officials covered their actions with the
outworn rhetoric of classical principles that had become a hollow substitute
for realistic thought.

Nothing in Morse’s education in the Western classics or his expe­
rience in the Customs Service led him to make impersonal, economic forces
the central theme of his history. He saw greed on all sides, foreign and
Chinese, but it was largely in personal or institutional terms. Although
seldom inspired by the missionary cause, he acknowledged that the mis­
ionaries did some good work and in any case that they had a role to play
in China. He held no brief for the opium trade but saw its importance for
British India, and how Chinese corruption flourished by facilitating it. He
also kept the domestic Chinese production of opium in view.

The Period of Subjection, 1894–1911 included chapters on postal
and railway development but otherwise focused on the cataclysmic events
of the Sino-Japanese War of 1894–95 and its repercussions, and the reform
movement of 1898 and its failure. A full half of the volume is devoted to the
Boxer Uprising and settlement, through which the theme of subjection is
finally illustrated. By documenting the long series of concessions and
privileges extorted by foreigners from the Chinese state, Morse showed the
weakness of Chinese nationalism in the late Ch’ing period. He set down the
record of humiliations and failures that in the end would inspire Young China
to embrace the cause of nationalism. The International Relations became
in a certain sense a textbook for the era of revolution.

This result came about partly because during thirty-three years’
service as a Chinese employee, Morse had been trained to consider the interest of the Chinese government whenever it was opposed to the interests put forward by foreign consuls or merchants. A foreign commissioner of customs in China was, to be sure, part of the foreign invasion. But his role in resisting this invasion was shaped by the letter of the treaties and China’s residual rights not impaired by the treaties. In short, a customs commissioner in the footsteps of Robert Hart had in mind an ideal entity known as China to which his efforts were meant to be helpful. At the same time he was well aware of the individual persons and circumstances that in his view held China back on the path of progress. The customs commissioner was thus a reformer who harbored foreign ideas as well as a protagonist of the Chinese interest as he saw it. It was a difficult position to occupy comfortably.

As a historian Morse was not merely trying to chronicle the obvious forward march of foreign interests in China under the imperialist powers. “Imperialism” was not a main actor in his drama. But his record supplied chapter and verse for the foreign aggression in China, about which Morse noted that basically the British led and America, in particular, followed. It was quite natural, then, that I should find in 1972 that the Leningrad University Seminar on China conducted by Professor Gerontii Efimov took Morse’s *International Relations* as a major source of information concerning the imperialist encroachment on China. It also provided a particularly rich source of material for Hu Sheng’s highly influential polemic of 1952, *Ti-kuo yü Chung-kuo ti cheng-chih* (*Imperialism and Chinese Politics*).

**A Personal Perspective**

History and historians both develop through generations. I see Morse as a member of the generation of 1900–1910 and myself as a member of the generation of about 1940–50. Needless to say, a new generation had emerged to dominate the Chinese history field by about 1970–80. We are therefore dealing with historical subjects. The protagonists are dated. In what follows I take myself as a representative of my generation. Perhaps this can be excused because it allows me to testify on the basis of a particular kind of knowledge. My aim is to secure further perspective on Morse’s contribution.

The history writing of Morse and myself was separated by about fifty years. Each of us, of course, wrote transitional works, in the sense that all historical studies have to be updated and superseded in due time. The
interesting question is the degree of continuity and discontinuity between the two. Since both of us came from a New England education and participated in the same Atlantic culture, we obviously had more than merely a Harvard connection between us. Morse put together the British record in China from the seventeenth century to 1912 mainly from British sources. I helped begin the use of Chinese sources and was led into the analysis of Chinese society as a different culture. The cultural difference between China and the West in Morse's day was so great that it hardly needed to be stressed.

By my time things had changed drastically. The more self-conscious terminology and concepts of the new social sciences had spread around the world. Nationalism and foreign education had begun to produce in China a generation of modern-minded historians who could do their thinking from much the same standpoint as a Western historian. Historians of my generation were thus able to find help from Chinese scholars of the modern type who knew more than we did of Chinese sources, institutions, and attitudes. By the time of my retirement, the attempt of Western scholars to develop the social history of China had met a response from modern Chinese historians. A new international point of view was taking shape. Morse and I may thus be seen to represent successive stages in a continuing process. The residue and vestiges of cultural differences are now more clearly marked and understood. Historians from all cultures participate increasingly in a world culture.

From the standpoint of their successors, Morse's generation and my own may be viewed as representing part-way stages. Morse assumed from his experience that Chinese documents were often meaningless and hid as much as they disclosed. He assumed that corruption and self-seeking would be the norm in official life and that patriotism would be very weak. While he attempted to be as unbiased as possible, he was well aware of the foreign and Chinese origins of the imperialist treaty system and the necessity of its continuance in his time. In my generation imperialism began to be seen as only one part of a social-cultural expansion of the West into China. The scholarly analysis of economic imperialism had begun to separate into "good" and "bad" aspects.

How does Morse fit into this picture? Clearly he was very much one of Hart's young men, who grew in competence and stature as his Customs career unfolded. He shared the I.G.'s basic goals and loyally did his bidding. Like Hart, Morse possessed a certain degree of religious concern, and he tried to live a life of Christian charity; but he was never
dogmatic about religion, particularly in his work. The two men had an essentially secular mission in China. They both set an example of honesty in the performance of duty and carefully avoided the tentacles of gift-giving, reciprocal loyalties of friendship between Chinese and Westerners, and the ever-present chances for corruption. The Maritime Customs prided itself on its probity and clear conception of public service. Within itself the Customs story is a self-contained saga of adherence to duty and success in public service, a rare story for its place and time.

The Customs secured for China a revenue from foreign trade that the late Ch’ing regime, left to itself, would never have been able to secure through its own decadent and corrupt channels. Moreover, the Customs served as a diplomatic agent dealing with foreign demands and unsettling incidents. Like the missionary, the customs commissioner was an institution builder and exemplar of Western ideals. In a broad sense, the missionary and the commissioner were acting on the same impulse to spread the assumed benefits of an assumed Western civilization.

There can be no doubt that the Maritime Customs was an agent of modernization and therefore in the mainline of China’s development. One should, however, look to Japan to see one major difference. In Hart’s and Morse’s time, the Chinese were not trained to take the Westerners’ places, and Morse himself complained that they did not learn the kind of honest and efficient organization the Customs represented. The Chinese were not apprenticed to power, only to low-level service, and so were little able to comprehend how the system worked. In Japan, the foreigners were there to disappear, leaving Japanese behind who were trained to take over. The Western lack of trust in Chinese probity, coupled with the scorn many Chinese felt for foreigners, caused the Chinese to pay a bitter price, but the Westerners played into this situation.

Whereas Japan quickly managed to regain control of its Maritime Customs establishment, China continued to rely on Western expertise well into the twentieth century. This exposed the imperialist face of the Chinese Customs even more clearly. Small wonder, then, that access to the Customs archives led Chinese Marxist historians after the establishment of the People’s Republic to put out a series of volumes on the topic “Imperialism and the Chinese Maritime Customs.”

I doubt that there is much new to be said on this vital subject. Without the pressure stemming from the Anglo-French defeat of the Chinese imperial forces in midcentury, Hart would never have had his chance. The service he created was a direct product of imperialism. It did a job for
the foreign powers in opening China to trade, and by 1901 it was the
collecting agent for large debts and indemnities to be paid to the foreigners.
The extent to which this handicapped the Chinese central government in the
eyear twentieth century may be imagined, though it is still to be worked out
in detail. Whereas Hart had been able to use the early customs revenues to
set up language schools, Chinese legations abroad, and many other things
of value, by the time of his departure in 1908 the role of the Customs had
changed. Perhaps like the contributions of Mao Tse-tung, now divided into
his early “good” period and his later “bad” period, the Customs may be seen
as at first an institution of great benefit that after the high point of imperi­
alism in the 1890s became an institution that hampered China’s modern­
ization. The subject is indeed complex and cannot be settled here.

What can be said is that there continued to be a lack of fit between
what the Western powers claimed to be doing and what they actually did. In
December 1910 the last volume (number 12) of the first Cambridge Modern
History appeared in print. The chapter by Sir Frederick Pollock, “The Modern
Law of Nations and the Prevention of War,” is one of the more poignant
historical writings of modern times. One of his conclusions is this: “As time
goes on, it will be less and less reputable among civilized States to talk of going
to war without having exhausted the resources of the Hague Convention; and
the necessity of any formal international declaration in that behalf may be
avoided altogether, if the tribunal acquires by custom, as one hopes it will, a
stronger authority than any express form of words would confer.” In the
volumes of The Cambridge Modern History there is repeated concern for the
legal arrangements between states as part of the law of nations. The writers are
law-conscious and share the feeling of their time that the civilization emanating
from Europe was reaching a new level of regard for common rules of behavior
and the consequent avoidance of violence.

From the perspective of eighty years later it may be suggested that
the law of nations was indeed a product of European civilization, but that
as the European powers spread their relations over the globe, colonized
peoples in other parts of the world became less concerned with law and
order—and for good reason. The breakdown of the law of nations in Europe
during World War I was perceived around the world as a symptom of
bankruptcy. Hubris had overtaken the colonial powers. Their concern for
law and due process in international relations had proved shallow, and this
fact called into question the underpinnings of the colonial regimes that the
European powers had established. Asian nationalism began to set its own
modernizing agenda.
It is impossible to know what form this book would have finally assumed if Fairbank had lived to see it to completion. Two things, however, seem evident. One is that John might well have found it uncomfortable to criticize Morse. This is understandable enough. After all, John’s biography began as a tribute to his “adopted grandfather”—a man whose photographic portrait graced his expansive study in Widener Library and then his office in Coolidge Hall for many years. What sort of Chinese-style filiality would permit a grandson to find fault with his tsu-fu—adoptive or otherwise? At the same time, however, John appears to have consciously avoided saying much about Morse’s admirable human qualities, as if trying to keep a certain emotional distance between himself and the object of his study. We may surmise, then, that he would not have been inclined to discuss the parallels between, say, Morse’s paternal approach to nurturing academic talent and his own. I feel no constraints on either score, however.

As to the first point, there seems to have been little of Morse to criticize. By all accounts he was a decent, thoughtful, and fair-minded fellow, whose efficiency, dedication, and intelligence impressed friends and colleagues alike. Although not a family man in the conventional sense, he came to love his niece Janet and had an extremely warm relationship with both his wife’s niece Anne Welsford and with John Fairbank. Morse was also extraordinarily devoted to his wife, Nan.

Mrs. Morse puzzled John, however. Although he knew Nan at least superficially on the basis of time spent with Hosea in England, he never fully understood her. Fairbank considered it “silly to spin theories about the interaction between any married couple,” yet he conceded that “a biographer nowadays has a duty to pay some attention to it.” Over time he came to
believe that Nan Morse played a pivotal, albeit difficult to define, role in her husband's career. As he put the matter once in correspondence to a relative of hers, "It is plainer all the time that Nan was a powerful daily manager in the dutiful and productive life of Hosea Ballou Morse and so is an integral part of his story."³

True to form, Fairbank explored every possible avenue of information on Mrs. Morse. Anne Welsford, Nan's niece, proved to be an especially valuable resource. Although her direct memory of the Morses dated only from her childhood in World War I, she had also heard and discussed various bits of family lore concerning her aunt along the way. Furthermore, after reestablishing contact with Fairbank in 1987, and later corresponding and visiting with Martha Coolidge as well, Welsford commented extensively on the Thwing correspondence and other sources of information as they appeared in the earliest drafts of the Morse biography.

Most of Anne's memories of Nan were unpleasant. She considered her aunt to be a "natural tyrant," capable of "violent hatreds." Nan was, she wrote, "determined to have her own way and, when she wanted . . . [Hosea] to join her in some course of action which he did not like, she would give him no peace until he agreed." Anne admitted, however, that it was difficult to give "a fair and unbiased picture" of her aunt. "In her lifetime," she wrote, "I saw her as a domestic tyrant and, although in her own way she was good to me, I did not love her. . . . I suspect if we knew the whole story of her years in China, we would see her as a tragic figure."⁴ Even those who did not suffer firsthand from Nan's despotic control remarked on her tyrannical disposition, "hardness," strong prejudices, and unforgiving nature.⁵

Nan did have a positive side, however. Anne Welsford acknowledged that Mrs. Morse "was always a devoted wife," and in her correspondence she repeatedly refers to Nan's loyalty to Hosea and her single-minded care of him. "If she bossed him it was, in her opinion, for his own good."⁶ Janet Morse recalled, "Everything went for Uncle Hos. She worshipped him."⁷ By all accounts, Hosea was equally devoted to her. Furthermore, Welsford and other relatives acknowledge that Nan could be quite generous and that even in her later years she had a number of friends—in spite of her despotic tendencies.⁸ Nan's warm correspondence with her young American cousin Lindsay in the period 1934–39 prompted Fairbank to write: "Your copies of Nan Morse's letters seem to be from a different person than her nieces know, a mystery indeed!"⁹

The portrait that Anne Welsford paints of a docile Morse dominated by a tyrannical wife, which derived from her experiences with the couple
during and after World War I, may not fit the facts of the previous period. On the whole Hosea seems to have called the shots in China, despite his wife’s periodic protests. Janet recalled her uncle as a “no-nonsense” sort of person, who “had a mighty good job opening ports along [the] Yangtze,” and “poor Auntie Nan she had to follow.”10 Although the contemporary evidence on this question is scant and later accounts are remarkably inconsistent, it would appear that only after Hosea’s retirement from the Chinese Customs Service did Nan take firm control of their personal lives, especially when he was ill.

The conflicting evidence concerning Nan’s personality and her role in Hosea’s life frustrated Fairbank. But with characteristic psychological insight he wrote to Lindsay on November 25, 1988: “I think Nan Morse developed a mental condition or compulsion . . . [in China]. What she could not control she feared and therefore hated. Her hatred of the Chinese came from a fear of them as exotic, unintelligible and dangerous.” He went on to surmise: “Devotion and domination were two sides of the same coin.” Nan, he believed, probably suffered more trauma than Hosea from the “frontier life in China,” and so her ailments “bulked larger.”11 My own view, based primarily on the personal letters exchanged between Morse and Hart during late 1907, is that the Shanghai Riots of December 1905 marked a crucial turning point in Nan’s state of mind.12

Obviously, as Anne and other relatives also recognized, Nan’s experiences in China “warped her in some way.”13 The evidence points to a clinical mental condition such as schizophrenia. Whether the product of biology or circumstance, or a combination of the two, this condition might well account for what relatives described as Nan’s “paradoxical personality” and “ungovernable fits of passion.”14 Anne describes at considerable length how Nan’s isolation in China apparently “drove her in on herself” and how she became absorbed in her own dark “fantasies”—particularly with regard to the people she disliked.15 The “severe nerve pains” in Nan’s head (her “neuralgia”) would help to explain at least some of her psychological problems, while at the same time her mental condition may have contributed to her physical discomfort.16

Hosea, for his part, seems only to have improved with age. Judging from the accounts of those who knew him both before and after his retirement from the Customs Service, he became more mellow and relaxed over time.17 Anne’s recollections of her “Uncle Hos” at Arden were, of course, extremely positive, as were those of all his other close contacts at the time. Welsford described him as “a dear,” a “tolerant peace-loving man”
who remained absolutely loyal to Nan and never uttered a word against her. 18 "I feel sure," Anne once wrote, that Hosea "was grateful for her years of care and devotion." 19

Unlike his classmate and colleague H.F. Merrill, Morse seems never to have established a warm relationship with any Chinese. As a customs commissioner he tended to be rigid, impatient, idealistic, and aloof in his dealings with Ch'ing officials, especially in his early assignments. Perhaps this was because of his steadfast belief in the moral superiority of Western civilization. Unlike Hart, who was at least occasionally ambivalent concerning the relative merits of Chinese and Western culture, Morse never questioned the West's claim to cultural superiority. 20 It is also possible, of course, that Nan's explosively negative view of the Chinese rubbed off on Hosea over time. 21 Anne Welsford tells us that Morse never spoke to her about China, and she, to her later regret, never asked him about his experiences. 22 Nor is there any evidence that Morse sought to establish or maintain contact with any Chinese after his retirement from the Customs. Although he served the republican government as an "'expert" in 1920, this limited partnership did not yield a favorable view of the Chinese delegation during the following year.

Morse's principal problem with the Chinese seems to have been his unpleasant time with the China Merchants' Steam Navigation Company in 1885, which poisoned his relations with Li Hung-chang and probably made him suspicious of Ch'ing officials and their subordinates in nearly all of his other postings. Furthermore, after 1885 he operated in areas where his training in the Mandarin dialect was not as helpful as it might have been in northern areas. Although all Ch'ing officials were supposed to speak Mandarin regardless of where they were posted, many local scholars in South China obviously did not—or at least did not speak it well.

Nonetheless, we may question Fairbank's statement in chapter 14 that there was "no one that Morse could talk to about the Chinese history he was writing." Hart certainly found informants at every level of Chinese society—and not only in the north. Morse could have done the same. According to his Phi Beta Kappa speech delivered in 1913, Hosea had "been in close touch with [Chinese] education" during his time in China and had "known well many of the advanced students"—at least some of whom had "passed through Chinese government universities" (as opposed to those who had studied in the United States or Japan). 23 Surely a few such students would have been willing to talk with Morse about China's recent history, but he seems to have seen no need to converse with them on the topic. This
situation offers a sharp and significant contrast to Fairbank’s fruitful contact with Chinese scholars such as T.F. Tsiang in the early phases of his own scholarly career.

Fairbank’s evaluation of Morse as a historian is quite fair-minded. He points out, for instance, that Morse, like all of his Western contemporaries, had little access to Chinese documentation on the nineteenth century—notably the huge collection of memorials and edicts on China’s nineteenth-century foreign relations called *Chou-pan i-wu shih-mo* (A Complete Account of the Management of Barbarian Affairs), presented to the Ch’ing throne in 1880 but published as a public document only in 1930. Yet we may wonder whether Morse would have used much of it even if it had been available. Although Morse did urge Fairbank to investigate the writings of Li Tz’u-ming (1830–94), a famous scholar-official whose notes on the study of history were published by the National Library of Peking (Peiping) in 1932, his primary purpose was simply to expose Fairbank to the literary language of the Ch’ing dynasty rather than the vernacular of the 1930s. Fundamentally Morse had little confidence in Chinese sources.24

Even if we excuse Morse for ignoring Chinese documents, he stands guilty of the charge of overreliance on British sources.25 As Tyler Dennett pointed out as early as 1922, the first volume of Morse’s *International Relations* draws upon only seven American sources—most of which were not contemporary and none of which were official. The result, Dennett wrote, “is an extremely unreliable guide to the study of American policy [in China up to 1860].” He acknowledged that the last two volumes of the work were “less deficient in their use of American sources” but said that American interests were still “slighted and misrepresented.”26

More modern scholars have taken Morse to task in other ways. Recent work on Chinese guilds, for instance, provides counterevidence to the claim in *The Gilds of China* that Ch’ing law did not give the individual adequate protection against coercion by the collective guild. Similarly, research on the Canton system of trade suggests that Morse was mistaken in asserting in volume 1 of *International Relations* that foreign consignees could sell only to hong merchants who “secured” the ship. And recent studies of the Ch’ing economy emphasizing the state’s active effort to promote commercial activity call into question the view expressed in *Trade and Administration* that the imperial government was no more than a “taxing and policing agent” that refrained from involvement in the conduct of trade.27

Nonetheless, on the whole Morse’s books have held up better and longer than those of most of his contemporaries. He is still cited as a standard
authority far more than he is criticized. Furthermore, as Morse knew well and Fairbank later acknowledged, the role of all scholars is to be the stepping-stone for future generations.\textsuperscript{28} To be criticized and eventually superseded is the inevitable fate of every significant academic work. Nor is criticism necessarily an unwelcome thing. When Fairbank began to take flak for his outspoken opposition to Kuomintang policies, he must have remembered Morse’s statement in 1930 that the book on which he and Harley Farnsworth MacNair had collaborated, \textit{Far Eastern International Relations}, “had the supreme merit of being banned (and thereby boycotted) by the Nanking government.”\textsuperscript{29}

Turning to Morse’s role as a teacher, we should note that from the beginning he guided Fairbank with a firm but gentle hand. When John passed his Oxford thesis defense for the B.Litt. in early 1931, he immediately moved from “Mr. Fairbank” to “John” in Morse’s letters and became, in effect, a member of the family.\textsuperscript{30} Thereafter the paternalistic elder scholar worked earnestly and persistently to shape his protégé’s career as a historian, guided by the premise, which Fairbank unquestionably accepted, that “from our wisdom of the past we can instruct the headstrong impetuosity of the present, if the present will lend (or give) us its ear.”\textsuperscript{31}

During Fairbank’s first stint in China, from 1932 to 1936, Morse’s primary goal was to steer him away from overabsorption in the Chinese language and what he called the “arid waste” of sinology—that is, the self-contained study of China, as opposed to the historical evaluation of events and trends. Morse put the matter bluntly to John in 1933, “[Y]our field is history, and I look to have you fill at Harvard (or elsewhere) the post so well filled by MacNair at Chicago.”\textsuperscript{32}

With uncommon patience and obvious interest in Fairbank’s evolving work on the origins of the Sino-foreign inspectorate of customs, Morse provided personal introductions to a wide range of scholars, Customs officials, and other useful contacts, as well as bibliographic suggestions and a wealth of primary research materials (including his own letter books and the private correspondence of Hart noted by Fairbank in the Introduction). He offered advice on research strategies and suggested fruitful sources of archival information in both England and China. Fairbank, for his part, continually bombarded Morse with questions, sent him manuscripts and syllabi for review, and followed his instructions and advice closely and carefully. He was not by any means a clone of his mentor, but they did share a preoccupation with the Western “impact” on China.\textsuperscript{33}
The letters Morse and Fairbank exchanged in the period from 1930 to 1934 reveal more clearly than any other single source the qualities of generosity, warmth, humor, and paternal affection that Morse may always have possessed but seldom displayed to those outside the family. In many ways Fairbank brought out the best in Morse, just as Morse brought out the best in John.

The two men shared far more than a Harvard background and similar academic interests. Both were liberal-minded men and at the same time hardheaded realists, who wrote extremely well, loved precision in language, and railed good-naturedly about “the eccentricities of English English,” which each tried to master. They also found the same things amusing. Wordplay appealed to both, and we can imagine John’s delight when Morse recounted how, in a private theatrical performed by him and his friends in late nineteenth-century China, the Hong Kong–Shanghai Bank came to be “the Shankong & Banghai Corping Hongkoration.”

When Fairbank told Morse that he would like to dedicate his planned book on the Customs Service inspectorate to him, Morse responded in the whimsical fashion noted in the Introduction. But he also added a more sober note: “I think you had better amend your dedication to read to the Memory of H.B.M. etc. for I may not see your book in print.” This was, of course, not simply a comment on Morse’s frail health; it was also a well-informed statement about the difficulty of undertaking a study such as Fairbank envisioned.

In addition to providing academic counsel, Morse also supplied valuable moral support to Fairbank, which he could deliver with wit as well as wisdom. When John announced in 1932 that he and his fiancée, Wilma Cannon, were going to “make over” their marriage service in China “to suit ourselves, within certain limits,” and that they had “decided to expurgate the Holy Ghost” from the nuptial ceremony, Morse offered “congratulations and best wishes,” observing dryly: “I hope the Holy Ghost has been informed of your intention to omit him, but in any case whether in unity or trinity . . . one feature (and the only one) essential for a legal marriage is registration at the consulate or legation.” And when John later told Morse that his teaching duties at the Customs College would include course work on the Renaissance and Reformation—about which he knew very little and for which books in China were extremely scarce—Morse promptly sent over a number of works from his own collection, noting: “I remember with what success you eliminated the Holy Ghost, and judge that your ignorance of the Reformation is abysmal.”
Morse, more than any other individual (with the possible exception of Sir Charles K. Webster at Harvard), launched Fairbank on his astonishingly productive scholarly career, which spanned nearly sixty years and resulted in the publication of 57 books, more than 140 articles and essays, and an even greater number of book reviews. Like his mentor, Fairbank always aimed at clarity, completeness, and objectivity in his scholarship. He described his approach in 1930 as one based on description and analysis. Although Fairbank later became a highly visible policy advocate and something of a “Delphic figure” on the American scene, he never abandoned the idea, to which Morse fully subscribed, that the careful study of history was the key to making sense out of human experience. Nor did he ever forget Morse’s antisinological injunction that the Chinese language was merely a tool for understanding the Chinese past and present, not an end in itself. Not surprisingly, if we compare Morse’s approach to cultivating human talent with Fairbank’s, we see important affinities. Indeed, perusing the various entries by students and colleagues in *Fairbank Remembered* (1992) after reading the Morse-Fairbank correspondence produces an almost eerie sense of déjà vu. Both men led exemplary, disciplined lives and naturally encouraged self-discipline in others. They emphasized clarity in thought and writing, as well as special care with documents. They were jealous of their time (albeit for somewhat different reasons) yet extremely generous with their advice and resources; and each managed to strike a congenial balance between formality and relaxation, gentle persuasion and dictatorial preemptiveness.

They could be brutally frank, but in the spirit of helpful criticism. Each saw the need to “plan careers,” not simply to provide instruction and guidance. And both seem to have shared Fairbank’s well-known dictum for students who feel too acutely the burden of indebtedness to their teachers: “Don’t feel you should try to pay it back,” he admonished. “Instead, pass it on.”

But whereas Morse carefully trained a single soldier in the war against ignorance, Fairbank built an entire army. Moreover, he established a world-class institutional structure for the development of talent at Harvard (the East Asian Research Center) and at the same time helped other universities and colleges to set up programs on China, both at home and abroad. By the time Morse embarked on his second career as a historian, he had neither the energy nor even the inclination for such empire building. His
lasting contribution to Chinese studies was his own scholarship and Fairbank himself.

Finally, we might note that unlike Morse, who set his sights rather narrowly on history in the traditional sense, Fairbank—the product of a new era of processing knowledge—emphasized the multidisciplinary study of China. The hallmarks of his approach were "diversity, breadth, pluralism and vigor." Somehow, I think Morse would have approved of this strategy, for despite his relatively confined way of looking at things, he plainly understood that times change and people must change with them. As he put the matter to Thwing in 1921, upon the latter's retirement as president of Western Reserve University, "the younger generation probably understands the needs of the time better than those of an earlier age."
### Appendix A

**Summary of H.B. Morse’s Customs Career**

<table>
<thead>
<tr>
<th>Place</th>
<th>Rank</th>
<th>Pay (taels per month)</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shanghai</td>
<td>4th Assistant B</td>
<td>75</td>
<td>August 20, 1874 to January 31, 1876</td>
</tr>
<tr>
<td>Shanghai</td>
<td>4th Assistant A</td>
<td>100</td>
<td>to February 28, 1877</td>
</tr>
<tr>
<td>Tientsin</td>
<td>4th Assistant A</td>
<td>100</td>
<td>to October 31, 1878</td>
</tr>
<tr>
<td>Peking</td>
<td>4th Assistant A</td>
<td>100</td>
<td>to July 31, 1879</td>
</tr>
<tr>
<td>Peking</td>
<td>3rd Assistant B</td>
<td>125</td>
<td>to September 30, 1879</td>
</tr>
<tr>
<td>London</td>
<td>3rd Assistant B</td>
<td>125</td>
<td>to December 31, 1880</td>
</tr>
<tr>
<td>London</td>
<td>2nd Assistant A</td>
<td>150</td>
<td>to March 31, 1882</td>
</tr>
<tr>
<td>London</td>
<td>2nd Assistant B</td>
<td>175</td>
<td>to August 31, 1882</td>
</tr>
<tr>
<td>Leave</td>
<td>[investigation of bonding]</td>
<td>½ of 175</td>
<td>to March 31, 1883</td>
</tr>
<tr>
<td>Tientsin</td>
<td>2nd Assistant B</td>
<td>175</td>
<td>to July 31, 1885</td>
</tr>
<tr>
<td>Shanghai</td>
<td>[duty w/CMSNC; no customs pay]</td>
<td>300</td>
<td>to March 31, 1886</td>
</tr>
<tr>
<td>Shanghai</td>
<td>[duty w/CMSNC; no customs pay]</td>
<td>400</td>
<td>[Chinese pay] to May 1887</td>
</tr>
<tr>
<td>Shanghai</td>
<td>2nd Assistant A</td>
<td>200</td>
<td>to September 15, 1887</td>
</tr>
<tr>
<td>Peking</td>
<td>2nd Assistant A</td>
<td>250</td>
<td>to October 31, 1887</td>
</tr>
<tr>
<td></td>
<td>[Acting Assist. Secretary]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shanghai</td>
<td>Deputy Commiss.</td>
<td>300</td>
<td>to March 31, 1888</td>
</tr>
<tr>
<td></td>
<td>[Deputy Commiss. for Bonding]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shanghai</td>
<td>Deputy Commiss.</td>
<td>300</td>
<td>to March 15, 1889</td>
</tr>
<tr>
<td></td>
<td>[Assist. Statist. Secy.]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kiungchow</td>
<td>Acting Commiss.</td>
<td>350</td>
<td>to March 31, 1889</td>
</tr>
<tr>
<td>Pakhoi</td>
<td>Acting Commiss.</td>
<td>350</td>
<td>to March 31, 1890</td>
</tr>
<tr>
<td>Leave</td>
<td>Depty. Commiss.</td>
<td>150</td>
<td>to March 31, 1892</td>
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<tr>
<td>Tamsui</td>
<td>Acting Commiss.</td>
<td>375</td>
<td>to June 30, 1895</td>
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<tr>
<td>Shanghai</td>
<td>Depty. Commiss.</td>
<td>300</td>
<td>to May 31, 1898</td>
</tr>
<tr>
<td>Position</td>
<td>Salary (currency)</td>
<td>Duration</td>
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</tr>
<tr>
<td>----------------------------------</td>
<td>-------------------</td>
<td>------------------------------</td>
<td></td>
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<tr>
<td>Lungchow Commissioner</td>
<td>400</td>
<td>to May 31, 1898</td>
<td></td>
</tr>
<tr>
<td>Pakhoi Commissioner</td>
<td>400</td>
<td>to June 30, 1898</td>
<td></td>
</tr>
<tr>
<td>Pakhoi Commissioner</td>
<td>400 plus 400</td>
<td>to March 31, 1899</td>
<td></td>
</tr>
<tr>
<td>Hankow Commissioner</td>
<td>400 plus 400</td>
<td>to March 31, 1900</td>
<td></td>
</tr>
<tr>
<td>[opening Yochow]</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leave Commissioner</td>
<td>400</td>
<td>to March 31, 1902</td>
<td></td>
</tr>
<tr>
<td>Extended leave Commissioner</td>
<td>400</td>
<td>to November 30, 1902</td>
<td></td>
</tr>
<tr>
<td>Shanghai Officiating Chief</td>
<td>800</td>
<td>to December 31, 1902</td>
<td></td>
</tr>
<tr>
<td>[Inspectorate Secretary General]</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pakhoi Commissioner</td>
<td>800</td>
<td>to December 31, 1903</td>
<td></td>
</tr>
<tr>
<td>Canton Commissioner</td>
<td>800</td>
<td>to December 31, 1903</td>
<td></td>
</tr>
<tr>
<td>Shanghai Statistical Secretary</td>
<td>900 plus 100</td>
<td>to 1907</td>
<td></td>
</tr>
<tr>
<td>[Inspectorate and Deputy Postal General] Secretary</td>
<td>½ of 900</td>
<td>to 1909 (retired)</td>
<td></td>
</tr>
</tbody>
</table>
Appendix B: Obituary of Morse, by C.A.V. Bowra

After Morse died in February 1934, C.A. V. Bowra, who had served as officiating I.G. ad interim, wrote the following obituary for the Journal of the Royal Asiatic Society.

Hosea Ballou Morse was a Canadian by birth, having been born at Brookfield, Nova Scotia, on 18th July 1855. He was the eldest son of Albert David Morse and Mercy Dexter (Park) and came of a family which traced its descent from Massachusetts ancestry of the 1635 flight. But his grandfather's grandfather in 1776 was a loyalist, who, when George Washington entered Boston, thought it better to accompany Sir William Howe to Halifax where he obtained a commission in the Royal Legion. [This entire assertion is inaccurate. The family came in 1760 as settler-planters.]

Nearly a century later the family returned to Massachusetts, Albert David Morse settling in Medford in 1865, when Hosea was 10 years old. The father became naturalized as a citizen of the United States, and the son became an American with him [in 1869]. In 1866 Hosea Morse entered the Boston Latin School, taking the short course, and on graduation in June, 1870, obtained the Franklin medal. The brilliant intellectual equipment which so marked the whole of his life was already showing itself. Though only 16 [15] he proceeded to Harvard, and devoted himself mainly to classics, for which he had a great liking and aptitude, and in which he took a First Class (summos honores) on graduation.

Immediately after graduation in 1874, at the age of [nearly] 19, he received an appointment in the Chinese Maritime Customs Service, on the recommendation, it is believed, of Mr. Edward B. Drew, a New Englander, who, though still quite a young man, had already achieved a distinguished...
position as a Commissioner of Customs in that Service, and was one of that brilliant group of young men of various nationalities who gave Mr. (as he then was) Robert Hart such effective co-operation in the building up of his Service.

Three other young Harvard graduates went to China with Morse—H.F. Merrill, W.F. Spinney, and C.C. Clarke—of whom Mr. Merrill alone survives; and of the many batches of men from various countries who elected to serve China under Hart, this was surely one of the most remarkable. They were all men of sterling character and good ability; all four served their full time in China and did valuable work in important positions; while one of them, the subject of our memoir, accomplished, outside his official activities, a vast statistical and historical work which places him in the first rank among writers upon China.

Robert Hart soon saw that this young recruit was of uncommon calibre, and Morse had not been long in the Service before he found himself selected for some of the special missions and appointments which the Inspector-General held in his gift.

His first three years were passed in Shanghai, where he laid the foundations of his knowledge of Chinese. In 1877 he was transferred to Tientsin and while there was sent into the interior of the province on famine relief work, to distribute money and food in the district affected by the great famine of 1876-7. In 1878 he was appointed to the Inspectorate-General at Peking, whence he passed on to the London Office of the Chinese Customs in 1879, where he remained for three years. The Office was then under the charge of Mr. J.D. Campbell, C.M.G., and its chief occupation at that time was the responsible task of supervising the construction of the ships built in England for the Chinese Navy which was being formed by Li Hung-chang.

It was while he was in London that Morse married Annie Josephine Welsford, daughter of Joseph Welsford, ship-owner, of Liverpool and New York, a devoted helpmate who not only accompanied him to all the dangerous places of his career, but whose unceasing care of his health made possible the accomplishment of his vast labours.

In 1883 Morse was back again in China and once more appointed to Tientsin. The Commissioner there was a German, Gustav Detring, one of the great figures of the China of his time, and the trusted adviser of the Viceroy Li Hung-chang who was the virtual ruler of the Chinese Empire under the Empress Dowager. Morse became Detring's right-hand man, and in July, 1885, was sent on a special mission to Tongking [Pescadores] to
supervise the exchange of prisoners on the conclusion of peace with France after the Franco-Chinese war, one of China’s troubles from which, thanks to Hart’s diplomacy, she emerged comparatively unscathed. For this service Morse received the Chinese Order of the Double Dragon.

In the same year he was seconded from the Customs Service to assist in the organization of the China Merchants’ Steam Navigation Company, one of Li Hung-chang’s enterprises, an officially subsidized shipping company, established with the object of competing with the foreign-owned steamer lines on the Chinese coast.

In 1887 Morse returned to Customs duty as Deputy Commissioner charged with the organization of the bonding system at Shanghai. The next year he was appointed Assistant Statistical Secretary at Shanghai; in 1889 Acting Commissioner at Pakhoi, and in 1892, after two years leave, Acting Commissioner at Tamsui, Formosa. Then came the China-Japanese war; Formosa fell to Japan as part of the spoils of war, and the Chinese Customs staff was withdrawn. An interesting account of his experiences during this crisis was given by Morse in his article “A Short-lived Republic” which appeared in the *New China Review* in 1919, and which shows, incidentally, the nerve and resource displayed by him at a moment when all foreigners in Formosa stood in grave peril between the contending forces.

His next appointment was Deputy Commissioner in the Shanghai Customs, and in 1896 he was promoted to full Commissioner’s rank and sent to Lungchow on the Tongking frontier, perhaps as remote and forlorn a spot as could be found among China’s list of frontier posts. From here he went as Commissioner to Pakhoi, only a degree better, whence he proceeded in 1899 to Hankow with the special mission of opening up the province of Hunan to foreign trade.

This long spell of unceasing work and exposure to some of the worst climates in the Far East told upon a constitution never robust, and from 1900 to 1902 he was away from China on leave with his health seriously shattered. He recovered sufficiently to return and be Commissioner in Canton in 1903 and in 1904 was sent to Shanghai as Statistical Secretary.

In that department of the Inspectorate-General where the trade statistics of China are laboriously collated and published in great volumes full of valuable information little regarded even in China and hardly known at all outside of it, Morse found his appropriate place. Here was got together all that was to be known of the trade, with much matter bearing on the political and economic condition of the Chinese people and their commercial dealings with foreign countries. The study of these vast subjects offered
a field entirely congenial to Morse’s genius, and shaken in health as he was, he threw himself into the work with his accustomed ardour. During the four years in which he had charge of the department he not only reformed the whole system of the arrangement and presentation of the statistics of trade, but began a whole series of special studies which resulted ultimately in the production of those great books which form almost an encyclopaedia upon Chinese trade and government.

These enormous labours might well have broken a strong man, and with his frail physique and constant ill-health it is amazing that they were accomplished. In 1908, quite broken down, he went on leave. By Imperial Decree in 1909 he was given Civil rank of the Second Class (red button), and on the expiration of his leave in that year he retired and settled in England, only to be driven to Switzerland and Germany in search of the relief which doctors here [in England] were unable to give him. In 1910 he was given up, but in spite of this verdict of his physicians he gradually recovered; not only recovered, indeed, but lived for another twenty-four years to do much more important work.

In 1913 he returned to England and settled at Camberley, where he remained until his death. In 1917, profoundly affected by the war, he took out British naturalization papers and resumed the British status in which he had been born. In September, 1920, he went to Brussels as expert adviser to the Chinese delegation at the Financial and Economic Conference, and in 1922 received by Presidential Mandate the Order of the Chia Ho, Second Class.

His most important works are:—
1908 (3rd edition 1921). The Trade and Administration of China (dedicated to his three Harvard colleagues).
1918. International Relations of the Chinese Empire, vols. ii and iii.
1927. In the Days of the Taipings (an historical retrospect given by him to the Essex Institute, Salem, Mass. U.S.A.).

Morse also wrote many articles in magazines and papers, and some pamphlets, the most notable being “A Short-lived Republic” (already referred to); “Currency in China” (in the Journal of the North China Branch of the Royal Asiatic Society); “Extraterritoriality in China” (Journal of Central Asian Society, 1923); “Concessions and Settlements in China”
(Nineteenth Century & After, July, 1928). In June, 1913, he delivered an address before the Western Reserve University on “The Repayment by the West of Its Debt to the East.” This brilliant paper reveals him at his best—in the depth and scope of his knowledge and his power of literary expression.

At one time and another he served in various extra-official capacities of which two are worthy of note. He was several times Secretary, and from 1904-7 he was Vice President of the North China Branch of the Royal Asiatic Society. Just before his final departure from Shanghai he was President of the American Association of China. After his retirement he took an active part as a member of the Council of the Royal Asiatic Society in London, and was also on the committee of the China Association.

He had many Chinese honours. He was given the degree of Doctor of Laws by the Western Reserve University, Cleveland, Ohio, in 1913; and in 1924 his own university, Harvard, conferred on him the same honour.

At the end of 1933 his health failed rapidly and he died of heart exhaustion on 13th February, 1934. A man of kindly disposition and winning personality, he left behind him many who held him in great affection. Modest and retiring, he did nothing to advertise his achievements. But his remarkable series of works, the triumph of character, genius, and industry over difficulties, will live and speak for him; and we may well believe that Canada, the country of his birth, together with America, China, and England, the countries of his adoption, will all hold his memory in honour.
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Notes

Abbreviations

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>AW</td>
<td>Anne Welsford</td>
</tr>
<tr>
<td>CFT</td>
<td>Charles F. Thwing</td>
</tr>
<tr>
<td>DL</td>
<td>Dana Family Letters, Massachusetts Historical Society, Boston</td>
</tr>
<tr>
<td>HBM</td>
<td>Hosea Ballou Morse</td>
</tr>
<tr>
<td>HFM</td>
<td>H.F. Merrill family letters, in the possession of his granddaughter Rosamund B. Beasley, of Chatham, Mass.</td>
</tr>
<tr>
<td>HFML</td>
<td>H.F. Merrill letter books, Houghton Library, Harvard Univ.</td>
</tr>
<tr>
<td>JKF</td>
<td>John King Fairbank</td>
</tr>
<tr>
<td>MC</td>
<td>Morse Collection, letters from Hart to his commissioners, Houghton Library, Harvard Univ.</td>
</tr>
<tr>
<td>MHC</td>
<td>Martha Henderson Coolidge</td>
</tr>
<tr>
<td>ML</td>
<td>Morse Letter Books, pressed copies of Morse’s semiofficial letters to Hart and others, Houghton Library, Harvard Univ.</td>
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<tr>
<td>MP</td>
<td>Morse Papers (miscellaneous content, mostly correspondence and personal records), in the possession of MHC</td>
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<tr>
<td>MS</td>
<td>Morse Scrapbook (undergraduate materials and later materials to 1879), Harvard Univ. Archives, Pusey Library</td>
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<td>NCH</td>
<td>North China Herald</td>
</tr>
<tr>
<td>RH</td>
<td>Robert Hart</td>
</tr>
<tr>
<td>TC</td>
<td>Thwing Collection, classification 1DD6, personal papers of CFT, Box 29, correspondence with Morse, by permission of Case Western Reserve Univ. Archives</td>
</tr>
</tbody>
</table>

Introduction

1. MP: HBM to JKF, Dec. 19, 1931.
2. Fairbank, Trade and Diplomacy on the China Coast, dedication.

1

**Origins and Education, 1855-1874**

1. For genealogies, see MP: tables by HBM, edited by Janet Morse Donnelly et al.; also Cleveland, comp., *Genealogy of the Cleveland and Cleaveland Families*, 3 vols. nos. 1234 and 3635; The Rev. Abner Morse, *General Register of . . . Sherburn and Holliston*; J. Howard Morse and Emily W. Leavitt, comps., *Morse Genealogy*, 2 vols. sec. Z, nos. 476, 1053, 1054, 1066, 2250, and pp. 150 and 153; and esp. Fred E. Crowell, “New Englanders in Nova Scotia,” unpublished, copyrighted manuscript. In Crowell, each family, listed by number, is traced back to the original New England pioneers; Morse’s family number is 526.

2. John King Fairbank’s ancestor, Jonathan Fairebanke, was Samuel Morse’s companion in founding Dedham. The house they built is now advertised as “the oldest house in America” (*Fairbanks, Genealogy of the Fairbanks Family*, 31).

3. MP: HBM to H.F. MacNair, Dec. 26, 1931; William V. Morse to HBM, Oct. 10, 1907. MacNair taught at St. John’s University, Shanghai, and later at the University of Chicago. He and Fairbank planned a biography of Morse, for which Morse wrote an autobiographical report. The Morse Papers include a “chronology” and career résumés up to 1924.

4. Crowell, “New Englanders in Nova Scotia,” no. 526. The Acadians were a separate group from the French in Quebec. They were the first European settlers of Acadia (the modern maritime provinces) and had been there since the early 1600s. Champlain had explored and charted Acadia, setting up a fort at Port Royal (near Annapolis Royal) in 1605. The British felt they could not trust the Acadians and preferred Protestant, English-speaking settlers.

5. MacVicar, *Short History of Annapolis Royal*, 98-99: “One hundred acres were to be allowed each settler, and fifty acres to every member of his family, on condition that the land be cultivated in thirty years.” See also Crowell, “New Englanders in Nova Scotia,” no. 526; Stewart and Rawlyk, *People Highly Favored of God*, 4; E.C. Wright, *Planters and Pioneers*, 198; Robert R. McLeod, “Annapolis,” 265-73.


8. Crowell, “New Englanders in Nova Scotia,” no. 526 (Morse family), no. 165 (Church family), no. 76 (Chipman family), no. 272 (Hicks family), nos. 301-3 (Dexter families), no. 110 (Cleveland family); Cleveland, comp., *Genealogy of the Cleveland and Cleaveland Families*; J. Howard Morse and Leavitt,
comps., *Morse Genealogy*. Anna Church, wife of Abner Morse (1731-1803), was the daughter of Jonathan and Thankful Bullard Church of Watertown, next to Cambridge. David Chipman Morse (1777-1843) married Hannah Hicks, daughter of John and Sarah Church Hicks.

13. MP: HBM to Perkin (presumably of the Colonial Society of Massachusetts), Dec. 9, 1928.
14. MacLeod, "Northern Queens, Nova Scotia," 147, 151-52; MacLeod, "Nova Scotian Gains Distinction Abroad," 9. Alice MacLeod came from Caledonia, Queens County, a little town next to South Brookfield. Consequently, she knew all about Morse's family.
15. Apparently the earlier generations favored "Parks", but cousins of Morse's with the middle name used "Park."
23. MP: HBM to JKF, Sept. 3, 1931.
25. News of the deaths of his younger brothers apparently came to Hosea indirectly, if at all. His uncle, William V. Morse, wrote him from Omaha on October 25, 1907, mentioning, "[D]id you know that Ernest died at Hartford last summer. Natural causes." Another uncle, John L. McIntosh, wrote on March 10, 1915: "I presume, no doubt, you have heard of your brother, Harvie's death" (letters in MP). About Albert, nothing was said. Even his daughter did not know when he died.
26. MP: letter from HBM's first cousin, Olivia Hunt, in Brookfield, to their uncle, John L. McIntosh, in Boston, Jan. 18, 1915. James B. Hunt, a blacksmith, boarded with the Brydens at the time. When Olivia Hunt wrote to ask if he remembered Morse's birth, he replied, "Well I think I ought to there being no
Dr. in the county at the time. They called me out of bed about twelve o’clock at night to come here to Caledonia for old Mrs. Cushing to go to Brookfield to assist at his birth.”

32. Universalist-Unitarian Church of Halifax, Records.
34. G.H. Williams, “American Universalism,” 12, 50-61; also Cassara, Hosea Ballou, 35.
35. Watts, “Man Spelled Large.”
36. National Archives, Regional Office, Waltham, Mass. Albert petitioned for bankruptcy on October 30, 1867, for Halifax debts that he could not pay off as of June 1865. According to Medford tax records, he paid two dollars in both 1866 and 1867. The bankruptcy petition was accepted on February 22, 1868; later that year he bought and sold a small property on Pleasant Street in Medford, and his fortunes then improved.
38. MP: HBM to H.F. MacNair, Dec. 26, 1931.
39. Hall, Old Ships and Ship Building Days, 86.
40. Seaburg and Seaburg, Medford on the Mystic, 101-5, 135.
42. Brooks, History of the Town of Medford, 290.
44. On BLS, see Marson, Breeder of Democracy; Catalogue of the Scholars in the Latin Grammar School in Boston, 1866, 1867, 1868, 1870-71; and the records on BLS at the Boston Public Library.
45. Marson, Breeder of Democracy, 13.
46. Ibid., 123.
47. For other comments on corporal punishment at BLS, see Charles W. Greene’s letter in Jenks, Catalogue of the Boston Public Latin School; and Morison, Harrison Gray Otis, 16.
48. Documents on file in National Archives, Regional Office, Waltham, Mass. Albert’s final citizenship paper is missing, so only the copy of his certificate is in the file. The director kindly searched out another document and there found the January 1, 1865, date of the family’s Boston arrival.
49. The Medford Town Directories indicate Albert’s name, home address, and business address. The Boston City Directories indicate businesses by occupation and with addresses.
50. See Harvard University, Class of 1874 reports, Bendelari file, fiftieth reunion report; also Dana, miscellaneous clippings, Dana Family Archives.

51. *Journal*, July 3, 1891. See also Harvard University, Class of 1874 reports, twenty-fifth and fiftieth reunion reports. John Jr. became a local lawyer; Edwin, a doctor with a promise of distinction that his early death cut off.

52. Harvard University, Class of 1874 reports. The first report notes that the average age at commencement was twenty-two years and nine months. The youngest graduating was eighteen years and eight months, while Hosea was eighteen years and eleven months. The average height was nearly five foot nine. The anticipated postgraduate occupations for members of the class were law (53), business (32), medicine (21), teaching (19), and the ministry (7).


54. Harvard University, Class of 1874 reports. Baptists accounted for eight, Methodists four, Catholics four, Presbyterians three, Libertarians two, heterodoxy one, and Jewish one. Undecided numbered fifteen.


56. See *Medford Town Directories*; also *Medford: List of Town, County, and State Taxes and Annual Reports* (1866). The latter continues up to 1880 and beyond, with 1873 missing. Albert Morse paid taxes of only $4.46 in 1868, but after he bought the properties on South Street in 1874, his tax went up to $104.49. In 1875 Mercy, his wife, paid $17.00 in personal tax, but she had “abated taxes” for the rest, that is, no poll tax or real estate tax. Perhaps at this time Albert was in debt for setting up his shoe store downtown. The Morses may have rented their house and boarded elsewhere.

57. MS. Hollis 20 rented at $44, Hollis 23 at $60. Rooms in Houghton were also cheap, but in the other half dozen dormitories they were priced between $150 and $250. See also Harvard University, *University Catalogue, 1872-73*.

58. After graduation in 1874, there is no evidence of further close ties between them except for Harvard reunions. Bendalari followed an academic career, for sixteen years teaching romance languages variously at Yale and Harvard, and history at Harvard from 1884 to 1894. But at Harvard “he proved inadequate, and was swept out in the ‘house-cleaning’ of 1893” (Morison, *Three Centuries of Harvard*, 375). From 1894 to 1917 he was a foreign affairs writer and book reviewer for the *New York Sun*.

59. See Dana, “Autobiography,” chap. 3; Perry, *Richard Henry Dana III*, 54. About half the students had personal servants or “choremen,” a bit comparable to Oxford “scouts” though evidently not part of the college establishment. These choremen would bring up the firewood and also cold water from the pump that has been vestigially resubstantiated in front of Hollis Hall today. Presumably they also handled chamber pots. Morse would surely not have been able to afford these services.

61. James, Charles W. Eliot, vol. 1. Eliot had been born into comparative wealth; his father was suddenly bankrupted in the crash of 1859, however, and young Eliot had to cultivate the virtues of austerity.


64. MP: HBM to JKF, Nov. 25, 1931.


66. MS.

67. Ibid.

68. Rankings and grades for Morse’s classmates who served with him in China were as follows: Frank Spinney, rank 12 (grade 86); C.C. Clarke, 17 (82); Henry F. Merrill, 32 (80). See MS.

69. TC: HBM to CFT, July 27, 1908.

70. Palmer and Perry, "Philosophy"; see also Adams, Education of Henry Adams, 303.

Chapter 2: Entering China’s Service, 1874-1877

1. On Drew’s career, see his papers at the Harvard-Yenching Library, and also the Drew file in the Class of 1863 records, Harvard Univ. Archives, Pusey Library.

2. MC: RH to Drew, March 19, 1874.

3. See the fascinating discussion of Hart and handwriting in the Customs Service in C.A.S. Williams, Chinese Tribute, 23-24.

4. MP: HBM to H.F. MacNair, Dec. 26, 1931.

5. MS: Magenta, "Brevities," June 19, 1874.

6. MP: RH to HBM, May 19, 1874.

7. Groff-Smith, "American Girl Grows Up in China," 2. Helen Groff-Smith was Merrill’s only child, married to a Customs officer selected by her father. She notes that her father "knew he was a favorite of Sir Robert [Hart]'s" (7).

8. MP: JKF’s notes of a conversation with HBM, May 8, 1931; Harvard University, Class of 1874 reports; Harvard University, University Catalogue, 1873-74.

9. MC: RH to HBM, official service letter, May 19, 1874. See also C.A.S. Williams, Chinese Tribute, 15-16; and S.F. Wright, Hart and the Chinese Customs, 263.

10. MC: RH to HBM, May 19, 1874.
11. Perry, Richard Henry Dana; see also Dana’s journals at the Massachusetts Historical Society, Boston.

12. The Medford Town Directories and Medford: List of Town, County, and State Taxes indicate that Albert was not a resident in 1880 and 1881. The Registry of Deeds for Middlesex County shows him to be in town in December 1879. Therefore the family presumably moved in the spring of 1880. In 1882 all the Morse property in Medford was sold. See also Cleveland, comp., Genealogy of the Cleveland and Cleaveland Families, no. 3635. Russell and Company was run by Cunningham’s Forbes in-laws.


14. MS, editorial clipping.

15. This era of growth is vividly surveyed in Nevins, Emergence of Modern America. The Missouri River bridge at Omaha had been completed in March 1873 (57).


17. Census Records, National Archives, Regional Office, Waltham, Mass. The 1880 census listed Albert’s younger brothers, William V. and Samuel, as living in Omaha. The eldest children of both were born in Nebraska four years earlier.

18. At Salt Lake City the Customs Service recruits apparently had time for sightseeing. When Morse was living in retirement at Camberley, Surrey, sometime between 1913 and 1934, he contributed a reminiscence to a local newspaper (MP).

19. Daily Alta California, July 14, 1874, p. 1. See also Crofutt, Crofutt’s Overland Guide.

20. Daily Alta California, July 11, 1874, p. 1. The Pacific Mail Steamship Company advertised a sailing every fourteen days for Yokohama and Hong Kong, “connecting at Yokohama with the Company’s Branch Line for Shanghai via Hiogo and Nagasaki.” The San Francisco–Yokohama fare was reduced on July 9, 1874, to $150. The Pacific Mail’s fast ship Grenada had made 311 miles in one day, and the trip from Yokohama to San Francisco took seventeen days and nineteen hours.

21. Harvard University, Club of San Francisco, Constitution and By-laws; see also Harvard University, Class of 1874 reports, 1877 class report.

22. MP: JFK’s notes of a conversation with HBM, May 8, 1931.

23. Ibid.


26. On Hart’s career, see S.F. Wright, Hart and the Chinese Customs.


28. Until its destruction by the Japanese in 1942, the bronze statue of Sir Robert Hart on the Shanghai Bund bore Eliot’s inscription: “Inspector General of the
Chinese Maritime Customs / Founder of the Chinese Lighthouse Service / Organizer and Administrator of the National Post Office / Trusted Counsellor of the Chinese Government / Modest, Patient, Sagacious and Resolute / He overcame formidable obstacles and / Accomplished a work of Great Beneficence for China and / the World" (S.F. Wright, Hart and the Chinese Customs, 865).

31. NCH, Feb. 25, 1875, p. 166; Sept. 11, 1875, p. 265.
32. NCH, Sept. 9, 1876, p. 242; Feb. 15, 1877, p. 153.
33. NCH, March 11, 1875, p. 218.
34. Spence, To Change China, 104.
36. Some of these forms appear in the Inspector General's Circulars, 1861-1875; see also the volumes of Morse's official correspondence from Tamsui (MP).
37. See the fascinating discussion of C.A.S. Williams's "socialization" into the Chinese Customs Service at a somewhat later time (1903); Williams, Chinese Tribute, esp. 14-27.
40. Ibid.
41. MP: HBM to H.F. MacNair, Dec. 26, 1931.
42. Harvard University, Class of 1874 reports, 1877 class report. C.A.S. Williams (Chinese Tribute, 66-72) provides an illuminating discussion of how he learned Chinese for the Customs Service. See also note 46 below.
43. On the problem of dialects, see C.A.S. Williams, Chinese Tribute, 67.
44. MP: HBM to H.F. MacNair, Dec. 26, 1931.
45. See C.A.S. Williams, Chinese Tribute, 18, 68, 70-71.
46. On Hart's Chinese, see Bruner, Fairbank, and Smith, eds., Entering China's Service, 16-240 passim. See also Smith, Fairbank, and Bruner, eds., Robert Hart and China's Early Modernization, 5-6, 120, 151, 211, etc.
47. The British diplomat Thomas F. Wade published in 1867 a primer on Chinese documents, Wen-chien tzu-erh chi in sixteen parts. See Fairbank, Ch'ing Documents.
48. For details, consult Coates, China Consuls, 97-98; Dyce, Model Settlement, 55; Darwent, Shanghai, 198-202; Seaports of the Far East, 87.
49. NCH, Jan. 6, 1876, pp. 11-12.
51. Maybon and Fredet, _Histoire de la concession française de Shanghai_, 267-68.
52. Pott, _Short History of Shanghai_, 105-6.
53. Kahler, _Rambles around Shanghai_, 206.
54. Coates, _China Consuls_, 97.
55. Dyce, _Model Settlement_, 207; _NCH_, Nov. 8, 1877, p. 418; Darwent, _Shanghai_, 10, 170; Mayers, _Treaties of the Empire of China_, 378.
57. _NCH_, March 4, 1875, p. 189; June 5, 1875, p. 560; March 2, 1876, p. 183; June 12, 1875, p. 422; Oct. 7, 1875, p. 355; Nov. 18, 1875, p. 491; Sept. 11, 1875, p. 247.
58. _NCH_, Dec. 9, 1875, p. 582; Feb. 4, 1875, pp. 102-3; May 29, 1875, pp. 522-23; Sept. 18, 1875, p. 275.
59. _NCH_, July 8, 1876, pp. 33-35, and Jan. 6, 1876, p. 11; Dyce, _Model Settlement_, 95.
60. Darwent, _Shanghai_, 182-83.
62. MS.
63. _NCH_, Oct. 21, 1874, p. 398; see also Dyce, _Model Settlement_, 105-7.
64. Harvard University, Class of 1874 reports, 1877 class report.
65. _NCH_, May 29, 1875, p. 523.
67. Ibid.,
68. _NCH_, April 13, 1876, p. 345.
69. _NCH_, May 27, 1876, pp. 502-3. See also Nov. 2, 1876, p. 442.

Chapter 3: Adventures in North China, 1877-1879

2. See Liu and Chu, eds., _Li Hung-chang and China’s Early Modernization_.
4. Fairbank, Bruner, and Matheson, eds., _I.G. in Peking_ 1:389, RH to Campbell, Oct. 16, 1881. Detring appears far more often than any other Westerner in Hart’s journals for the period under consideration here.
5. MP: HBM to JKF, Jan. 2, 1933. See also Coates, _China Consuls_, 282-83.
6. MP: HBM to JKF, Jan. 2, 1933.
7. Ibid.
8. Ibid.
10. For abundant primary documentation on the famine, consult United Kingdom, Parliament, _Report on the Famine in the Northern Provinces of China_; also
Further Papers Respecting the Famine in China. References to key documents in these collections may be found in HBM, *International Relations of the Chinese Empire*, 2:308-313.

11. See, for example, ibid. (HBM), 1:309; also MP: HBM to Detring, July 3, 1878, published in *The Celestial Empire*, July 20, 1878.

12. During the famine period the *North China Herald* complained constantly that if the Chinese only had railways and good roads, food could have been transported easily into the disaster areas where the suffering was so great.


18. Ibid., 1-8.


22. MP: Detring to Muirhead, July 11, 1878; *The Celestial Empire*, July 20, 1878, p. 63.

23. MP: HBM to H.F. MacNair, Dec. 26, 1931.

24. MP: HBM to Detring, July 3, 1878; *The Celestial Empire*, July 20, 1878, pp. 63-64.

25. MP: HBM to Detring, July 3, 1878; *The Celestial Empire*, July 20, 1878, pp. 63-64.

26. See Feuerwerker, *China's Early Industrialization*.

27. MP: Sheng's letter to Detring; *The Celestial Empire*, July 20, 1878, p. 64.

28. Ibid.

29. Ibid.


32. Ibid.


34. C.A.S. Williams, *Chinese Tribute*, 21 ff., esp. 27.
35. MP: HBM to H.F. MacNair, Dec. 26, 1931.
37. See HBM, *International Relations of the Chinese Empire*, vol. 3, appendix F.
38. MP: HBM to JKF, Jan. 2, 1933.
40. *Weekly Advertiser*, March 27, 1879. The letters are signed "M. '74." The *Weekly Advertiser* was published every Thursday by the *Boston Daily Advertiser*. See also Drew Papers: RH to Knight, Peking, Aug. 4, 1879. On Ko’s death, consult the *Boston Daily Advertiser*, Feb. 22, 1882.
42. Hunt, *Making of a Special Relationship*, 118-24. See also J.R. Young, *Around the World with General Grant*. Hart's journal for this year devotes a great deal of attention to Grant's visit, but it is silent on Morse's role.
43. The Tientsin route is described in Mayers, Dennys, and King, *Treaty Ports of China and Japan*, 486-89.
44. MP: HBM to H.F. MacNair, Dec. 26, 1931.
46. Ibid., 266.

**Chapter 4: Rising in the Service, 1879-1885**

2. Fairbank, Bruner, and Matheson, eds., *I.G. in Peking* (RH’s letters to Campbell); Chen and Han, eds., *Archives*, vol. 1 (Campbell’s letters to RH).
4. Ibid., 1:303, RH to Campbell, Sept. 17, 1879.
5. Ibid., 1:310, RH to Campbell, Dec. 21, 1879.
6. MP: HBM to H.F. MacNair, Dec. 26, 1931.
7. Chen and Han, eds., *Archives* 1:459, Campbell to RH, Sept. 26, 1879.
8. Ibid., 1:474, Campbell to RH, Nov. 28, 1879.
15. Chen and Han, eds., Archives 1:556, Campbell to RH, Sept. 17, 1880: "I returned [a Chinese official’s] visit at Cannon Street Hotel this morning, taking Morse with me." On Li’s use of Chinese and foreign assistants, consult Folsom, Friends, Guests and Colleagues.
16. Chen and Han, eds., Archives 1:497, Campbell to RH, March 5, 1880.
17. Ibid., 1:505, Campbell to RH, April 16, 1880.
18. Ibid., 1:524, Campbell to RH, June 11, 1880.
20. Ibid., 1:564, Campbell to RH, Oct. 8, 1880.
21. Ibid., 1:596, Campbell to RH, Jan. 14, 1881. Anne Welsford, Nan’s niece, thought it most unlikely that her grandfather had become a U.S. citizen. Since Nan was born in the United States, she would automatically have had American citizenship, but she presumably held dual citizenship as a minor. After returning to England at fifteen, she then considered herself a British subject until her marriage. Before 1922, if one married a U.S. citizen, one automatically became a U.S. citizen. MP: AW to MHC, Dec. 2, 1989. Campbell had some of his facts wrong. The father of Morse’s fiancé never naturalized, and he had three sons studying at Cambridge.
23. Campbell to RH, in Chen and Han, eds., Archives 1:631, May 6, 1881; 1:685, Nov. 4, 1881.
24. For Paul King’s perspective on the London office, consult his book In the Chinese Customs Service.
25. Simmonds and Digby, eds., Royal Asiatic Society; see also Beckingham, “History of the Royal Asiatic Society.”
26. See Journal of the North China Branch of the Royal Asiatic Society (Shanghai), ns, 8 (1874).
27. MP: resignation form, Royal Geographical Society, 1901. Morse probably joined because of Alcock. The society has no record of any activity on Morse’s part until his resignation.
28. Fairbank, Bruner, and Matheson, eds., I.G. in Peking 1:399, RH to Campbell, Dec. 18, 1881; Chen and Han, eds., Archives 1:716, Campbell to RH, Feb. 24, 1882. Note that Campbell did not say that Morse wanted to see family, just friends.
29. Chen and Han, eds., Archives 1:717, Campbell to RH, Feb. 24, 1882.
30. Ibid.
31. Ibid., 1:744, Campbell to RH, June 23, 1882; Fairbank, Bruner, and Matheson, eds., I.G. in Peking 1:414, RH to Campbell, July 14, 1882; and Chen and Han, eds., Archives 1:756, Campbell’s riposte, July 28, 1882. In the end Morse did not go to Shanghai, but to Tientsin.
32. Chen and Han, eds., *Archives* 1:758-59, Campbell to RH, Aug. 4, 1882.
33. Ibid., 1:761, Campbell to RH, Aug. 11, 1882.
35. Harvard University, Class of 1874 reports, fourth report, June 1884.
36. MP: Elder and Welsford genealogical data.
37. MP: marriage records.
40. Chen and Han, eds., *Archives* 1:821, Campbell to RH, Feb. 23, 1883; ibid. 1:840, RH to Campbell, April 14, 1883.
41. MP: letter to JKF from the Pancoasts’ daughter, Lindsay Pancoast Zimmerman, Nov. 2, 1988. Nan spent part of her childhood in Germantown. George Marcus, a New York jeweler, and his sister, Dora Pancoast, were the children of Nan’s mother’s sister, who had married an American and remained in the United States while the Welsfords all went back to England. Dora’s husband, Dr. Henry Pancoast, wrote textbooks for English literature courses.
42. Harvard University, Class of 1874 reports, fourth report, June 1884.
45. *NCH*, June 29, 1883, p. 742.
47. *NCH*, April 2, 1884, p. 371 and throughout.
48. S.F. Wright, *Hart and the Chinese Customs*, chap. 17. Hart’s journals, although difficult to read for this period, are extremely revealing regarding his pivotal role in the negotiations.
50. Eastman, *Throne and Mandarins*, 124. See also *NCH*, May 9, 1884, p. 545, and May 16, 1884, p. 552.
52. See Eastman, *Throne and Mandarins*.
55. MP: HBM to H.F. MacNair, Dec. 26, 1931.
57. MP: Chun Hsieh-su to HBM, July 16, 1885, transmitting Viceroy Li’s orders to HBM.
58. MP: P. Ristelheuber to HBM, June 21, 1885; Admiral Lespèrs to HBM, July 1, 1885.
60. "Halifax Bay in China," *Morning Herald*, Oct. 28, 1885, citing the *Omaha Bee*.

61. MP: HBM's autobiographical résumé of 1924.

**Chapter 5: Advising the China Merchants' Company, 1885-1887**

1. MP: HBM to H.F. MacNair, Dec. 26, 1931. See also Hart, Journals, July 22, Aug. 21, and Aug. 22, 1885.

2. According to Hart's journals (July 22, 1885), Li wanted either Drew or Morse for the CMSN assignment.

3. See *Customs Service Lists*; also Drew, file in the Harvard Class of 1863 reports.

4. *Customs Service Lists*; Harvard Class of 1874 reports; also HFM and SL materials.

5. MP: H.F. Merrill to his sister Adelaide (Addie) from Korea, Nov. 21, 1885. Merrill remarked that this was the best evening he had spent since coming to China.

6. For biographical detail on Nan Spinney, consult Cleveland, comp., *Genealogy of the Cleveland and Cleaveland Families*, no. 3635; *Index to Essex Institute Historical Collections*, vols. 44-47; Goodhue, *History and Genealogy of the Goodhue Family*, 182; *Salem Gazette*, May 23, 1871; and SL. Nan (née Annie Goodhue Ward) was born on August 13, 1861, and married William Franklin Spinney in 1881. He died in 1928, and she died the following year.

7. SL: Anna Spinney, en route to Foochow, to her mother, Sept. 20, 1885. See also Anna Spinney to her mother, Sept. 1, 1885.

8. See S.F. Wright, *Hart and the Chinese Customs*, 506. On Merrill's administration of the Korean Maritime Customs Service, see HFM and HFML; also Deuchler, *Confucian Gentlemen and Barbarian Envoys*, 177. On Merrill's appointment in the context of Ch'ing policy, see Kim, *Last Phase of East Asian World Order*; and Chien, *Opening of Korea*.


11. See *Inspector General's Circulars, 1861-1875*, nos. 9 and 22 of 1873.
12. See the sources cited in note 10 above.

13. On the "kuan-tu shang-pan" system, consult Feuerwerker, *China's Early Industrialization*.

14. Ibid., on Sheng; also Hsia Tung-yuan, *Sheng Hsüan-huai chuan*.


16. See Feuerwerker, *China's Early Industrialization*. The Yung-cheng emperor in the mid-eighteenth century had bravely tried to increase officials' salaries by giving allowances "to nourish integrity" (yang-lien), but "official corruption" continued. See Zelin, *Magistrate's Tael*.


21. The ruse is discussed in Hart's journals (Sept. 12, 1885). See also MP: HBM autobiographical résumé of 1924, and Detring to HBM, July 24, 1885.


23. ML: HBM report to Li Hung-chang, March 1886.

24. Ibid. See also ML: HBM to Li, Dec. 1, 1886.

25. ML: HBM report to Li, March 1886. For details, consult the Butterfield and Swire Archives, SOAS Library, London.

26. ML: HBM to Detring, May 8 and April 16, 1886.


28. ML: HBM to Detring, May 8 and April 16, 1886.

29. ML: HBM to Alfred E. Hippisley, June 15, 1885.

30. ML: HBM to Detring, May 20, 1886.

31. ML: HBM to Sheng Hsüan-huai, June 9, 1886.


33. ML: HBM to Mr. Veitch, May 24, 1886.

34. ML: HBM to Detring, May 8, 1886.

35. ML: HBM memo to RH at Shanghai, May 27, 1886.


37. ML: HBM to F.S.A. Bourne, May 12, 1886.


39. ML: HBM to Detring, July 1, 1886.
40. ML: HBM to Detring, Aug. 3, 1886.
42. Lai, "China’s First Modern Corporation and the State," chaps. 4-5; idem, "Managerial and Operational Problems of the China Merchants’ Company."
43. This is Fairbank’s speculation, for which we have no other direct documentation.
44. ML: HBM to Detring, Aug. 31, 1886.
45. ML: HBM to Detring, Oct. 19, 1886.
46. Hart, Journals, Jan. 6, 1887.
47. ML: HBM to Detring, Nov. 13, 1886. For further background, see HBM to Detring, Sept. 11, 1886.
48. ML: HBM to Detring, Aug. 26, 1887.
49. Ibid.
50. ML: HBM to Detring, Oct. 10 and Oct. 19, 1886.
51. ML: HBM to Detring, Nov. 3, 1886.
52. ML: HBM memo to Detring, apparently accompanying a letter of June 8, 1887; see also the letters dated June 14 and July 2, 1887, regarding Captain Roberts.
53. ML: HBM memo to Detring, with letter of June 8, 1887.
54. ML: HBM to Detring, Nov. 3, 1886.
55. ML: HBM to RH, Nov. 4, 1886.
56. ML: HBM to Detring, Jan. 20, 1887.
57. ML: HBM to Bredon, Nov. 3, 1886, and HBM to Detring, Nov. 13, 1886, regarding Shen’s reprimand.
58. ML: HBM to Li, Dec. 1, 1886, in letter of the same date to Detring and letter of same date to RH (both unsent).
59. ML: HBM separately to RH, Bredon, and Detring, Dec. 2, 1886, regarding Ma’s knowledge of a letter from Li to Shen, and also noting that Mr. Cameron of the Hong Kong–Shanghai Bank disapproved of Morse’s resigning.
60. ML: HBM to Detring, Jan. 6, 1887.
61. ML: HBM to Detring, Jan. 20, 1887.
62. ML: HBM to RH, June 7, 1887.
63. ML: HBM to Detring, May 10, 1887.
64. ML: HBM to RH, June 7, 1887.
65. ML: HBM to Detring, Aug. 2, 1887.
66. Ibid.
67. ML: HBM to Sheng, Aug. 3, 1887.
68. ML: HBM to Detring, Aug. 10, 1887.
69. Ibid.
70. Ibid.
71. ML: HBM resignation, Li dispatch to HBM. In his letter of August 8 to Detring, Morse noted that the Chinese were demanding a retraction of
statements regarding Li in the *North China Herald*. See also ML: HBM to Li, Aug. 2, 1887; HBM to Detring, Aug. 2 and Aug. 8, 1887; HBM to RH, Aug. 8, 1887; HBM to Sheng, Aug. 8, 1887.

72. ML: HBM to Detring, Aug. 8, 1887.

73. ML: HBM to Cartwright, Aug. 25, 1887.

74. ML: HBM to Detring, Aug. 26, 1887.

75. Fairbank, Bruner, and Matheson, eds., *I.G. in Peking* 1:675, RH to Campbell, Aug. 21, 1887. Ivar Munthe Daage was a Norwegian who at the time was chief secretary. Hart’s journal entry for August 10, 1887, refers to Morse as a “scapegoat.”

76. MP: HBM to H.F. MacNair, Dec. 26, 1931, including HBM’s autobiographical notes on this episode.

77. Folsom notes, “In almost every case of a conflict between a foreign and a Chinese *mu-yu* [adviser]” Li sided with the Chinese (*Friends, Guests and Colleagues*, 156). See also Hart, Journals, Dec. 13, 1877.

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**Chapter 6: Shanghai and Pakhoi, 1887-1892**

1. MP: HBM to JKF, April 10, 1932. Hart’s journal does not mention the Morses until their departure on September 13. See Hart, Journals, Sept. 15, 1887.


3. MP: Ida Merrill to her sister Adelaide, March 20, 1887.

4. ML: HBM to Cartwright, Aug. 25, 1887.


6. MP: RH to Commissioner H.E. Hobson, Shanghai no. 3620, Commrs. no. 16,444, Oct. 21, 1887.

7. Ibid.


11. Ibid., 592-93; S.F. Wright, *China’s Struggle for Tariff Autonomy*, 294. Robert Bredon, as Shanghai commissioner in 1892, noted that after four years the bonding system was still little used. See Chinese Customs Service, *Decennial Reports, 1882-91*, 337, under Shanghai.


14. Ibid.
15. In 1904, when he came back into the Statistical Department at Shanghai, Morse remarked to the I.G., "In 1888 with half the volume of work, McKean and Morse were probably a stronger team than now Morse and Hancock" (ML: HBM to RH, S/O 3, Feb. 21, 1904; here and hereinafter, S/O indicates "semiofficial").
20. Ibid.
22. HBM, ed. and trans., "Practical Treatise on Legal Ownership."
23. HBM, Trade and Administration, 3rd ed., 165.
26. For instance, in compiling the tables for his 1889-90 article Morse used some currency equivalences contributed by "a Peking banker" and others by "a Shanghai banker."
27. Harvard University, Class of 1874 reports, fifteenth reunion report, 1889.
29. MP: HBM to John Fryer, Jan. 17, 1887.
32. Ibid.
33. See, for example, the critical view of Hart offered by Paul King, in In the Chinese Customs Service.
34. Coates, China Consuls, 236.
35. Ibid., 235-37.
36. We have been unable to determine the source of this quotation.
37. NCH, June 9, 1877, p. 567.
38. NCH, Nov. 22, 1877, p. 476.
40. Coates, China Consuls, 239; NCH, June 22, 1878.
41. Coates, China Consuls, 239-40.
42. Chinese Customs Service, Decennial Reports, 1882-91, 637.
43. Hosea’s niece Janet later recalled that Nan Morse hated such outports and used to “yap, yap, yap” at her husband for accepting assignments at places where “it wasn’t nice . . . and there was no one but Chinese.” Janet was not with the Morses during their first tour of duty at Pakhoi, however. See MP: Janet Morse tapes, 1981-82; and chapter 9, note 33, below.
44. Coates, China Consuls, 240-42. His living quarters alone were enough to unsettle his wits. The consulate in his time had “a row of privies” on two sides; both sets drained under it.
45. Ibid., 242-43.
48. Harvard Class of 1874 reports, 1904 report. An empty envelope in the Morse Papers indicates a forwarding address in Jackson, New Hampshire, but the local paper does not record that the Morses stayed at the local hotel, so they probably found a room at a boardinghouse. Nan did some sketching while there.
49. Customs Service Lists, 1893-94.

Chapter 7: Tamsui, 1892-1895

1. On Amoy’s early modern trade, see Ng, Trade and Society.
2. See Meskill, Chinese Pioneer Family.
3. Speidel, “Liu Ming-ch’uan in Taiwan.”
4. Morse’s letter books at Houghton Library contain pressed copies of his semiofficial letters to Hart. See Bibliographic Notes.
5. Collingwood, Rambles of a Naturalist on the Shores and Waters of the China Sea, 63.
7. On the roles of Hobe, Banka, and Twatutia, see HBM, International Relations of the Chinese Empire 3:230-31, as well as Chinese Customs Service, Decennial Reports, 1882-91, which Morse signed as of December 31, 1891.
8. ML: HBM to RH, S/O 2, April 11, 1892. See also HBM, International Relations of the Chinese Empire 3:48.
9. Speidel, “Liu Ming-ch’uan in Taiwan.”
10. We have been unable to determine the source of this description.
11. S.F. Wright, Hart and the Chinese Customs, 270-72. The outdoor staff consisted of tide-surveyors, examiners, and tidewaiters. See also note 15 below.
12. Hosie, known primarily for his later book, On the Trail of the Opium Poppy, was followed briefly by Sir P.L. Warren, whom Morse found less cooperative.
13. Hirth, *Textbook of Documentary Chinese*; idem, *Notes on the Chinese Documentary Style*. Within a few years, he was to resign from the Customs and become professor of Chinese at Columbia University.


16. ML: HBM to RH, S/O 16, Nov. 9, 1892.

17. Ibid.

18. ML: HBM to RH, S/O 14, Oct. 8, 1892.

19. Ibid.

20. Ibid.

21. ML: HBM to RH, S/O 18, Dec. 9, 1892.

22. ML: HBM to RH, S/O 15, Oct. 25, 1892; S/O 18, Dec. 9, 1892; S/O 19, Dec. 23, 1892; S/O 24, March 9, 1893; S/O 26, April 10, 1893; S/O 27, April 24, 1893, etc.

23. ML: HBM to RH, S/O 2, April 11, 1892; S/O 56, June 21, 1894; S/O 6, July 6, 1892; and S/O 10, Aug. 9, 1892. C.A.S. Williams (*Chinese Tribute*, 46-49) provides a fascinating discussion of smuggling.

24. ML: HBM to RH, S/O 4, May 11, 1892; S/O 6, July 6, 1892. See also S/O 36, Aug. 2, 1893; S/O 49, March 12, 1894; and S/O 50, March 22, 1894.

25. ML: HBM to RH, S/O 56, June 21, 1894. See also S/O 57, July 7, 1894; and S/O 59, Aug. 6, 1894.


27. ML: HBM to RH, S/O 57, July 7, 1894.

28. ML: HBM to RH, S/O 54, May 24, 1894; S/O 2, April 11, 1892; S/O 56, June 21, 1894.


32. ML: HBM to RH, S/O 56, June 21, 1894. See also S/O 5, May 26, 1892; S/O 10, Aug. 9, 1892; S/O 19, Dec. 23, 1892; S/O 20, Jan. 6, 1893; S/O 22, Feb. 3, 1893; S/O 45, Jan. 8, 1894; and S/O 52, April 25, 1895.

33. ML: HBM to RH, S/O 52, April 25, 1895. See also S/O 10, Aug. 9, 1892.

34. ML: HBM to RH, S/O 7, June 27, 1892; S/O 45, Jan. 8, 1894; S/O 48, Feb. 24, 1894.


36. Ibid.
38. ML: HBM to RH, S/O 28, May 6, 1893; S/O 38, Sept. 23, 1893.
39. ML: HBM to RH, S/O 32, June 23, 1893. See also S/O 28, May 6, 1893; S/O 34, July 26, 1893; and S/O 38, Sept. 23, 1893.
40. ML: HBM to RH, S/O 34, July 26, 1893. See also S/O 26, April 10, 1893.
42. Macdonald, ed., From Far Formosa, 42, 44.
44. ML: HBM to RH, S/O 3, April 26, 1892.
45. ML: HBM to RH, S/O 4, May 11, 1892. See also S/O 7, June 27, 1892.
46. ML: HBM to RH, S/O 11, Aug. 25, 1892; S/O 13, Sept. 27, 1892.
47. Coates, China Consuls, 319.
48. Annie J. Morse, “Book 1 of Plant Sketches.”
50. ML: HBM to RH, S/O 17, Nov. 29, 1892.
52. Dr. Uwe Brinkmann, a “China hand” and a member of the committees on international medicine, tropical medicine, and epidemiology at Harvard’s School of Public Health, kindly provided the information on Morse’s apparent illness and the lack of contemporary diagnosis.
54. ML: HBM to RH, S/O 24, March 9, 1893. See also S/O 26, April 10, 1893.
55. ML: HBM to RH, S/O 16, Nov. 9, 1892.
56. ML: HBM to RH, S/O 19, Dec. 13, 1892.
57. ML: HBM to RH, S/O 44, Dec. 21, 1893.
58. ML: HBM to RH, S/O 26, April 10, 1893.
59. The extensive collection of Henry’s letters to Morse, together with some of Nan Morse’s sketches, are in the Archives of the Royal Botanical Gardens, Kew, Richmond, Surrey. Although Morse enjoyed collecting, he did not pursue this interest after leaving the outports.
60. ML: HBM to RH, S/O 40, Oct. 23, 1893.
61. Harvard University, Class of 1874 reports, twentieth reunion report, June 1894.

Chapter 8: Taiwan in the Sino-Japanese War, 1894-1895

1. For a convenient summary of the war, see Liu and Smith, “Military Challenge.”
2. Morse noted, for instance, that the U.S. Consulate Agency in Taiwan had been abolished over accusations of graft (ML: HBM to RH, S/O 5, May 11, 1892).
3. ML: HBM to RH, S/O 20, Jan. 6, 1893.
7. ML: HBM to RH, S/O 38, Sept. 23, 1893. See also S/O 28, May 6, 1893.
9. ML: HBM to RH, no. 1204, Sept. 26, 1894, sheets 2 and 6; Sept. 27, 1894, sheet 7; Sept. 29, 1894, sheet 8; Sept. 30, 1894, sheet 9; Oct. 1, 1894, sheet 10; Oct. 6, 1894, sheet 13.
12. Ibid., sheets 27, 28, and 29.
15. ML: HBM to RH, S/O 61, Sept. 6, 1894. See also HBM, *International Relations of the Chinese Empire* 3:40.
17. Ibid.
18. ML: HBM to RH, S/O 73, Feb. 25, 1895; S/O 74, March 6, 1895.
20. ML: HBM to RH, S/O 74, March 6, 1895.
22. ML: HBM to RH, S/O 76, March 26, 1895. J.W. Davidson later wrote *The Island of Formosa*.
23. ML: HBM to RH, S/O 76, March 26, 1895.
24. ML: HBM to RH, S/O 75, March 22, 1895; SL: Anna Spinney to her mother, April 30, 1895. Hart had already wired Morse and Spinney to send their wives away from Taiwan.
25. SL: Anna Spinney to her mother, April 30, 1895. See also note 36 below on Nan's abortive effort to reach HBM in April.
26. ML: HBM to RH, S/O 76, March 26, 1895.
27. ML: RH to Spinney and HBM, March 31, 1895.
28. Ibid.
29. Ibid.
30. ML: RH to HBM, April 2, 1895.
32. Ibid., 48. On October 13, 1894, Governor Shao Yu-lien was transferred to Hunan, and the fantai, T'ang Ching-sung, became acting governor (ML: HBM to RH, no. 1221, Oct. 22, 1894). Morse reported that the Tamsui haikuan, Shao Wen-p'u, had gone on sick leave, with Chiang Shu-fan taking over (HBM to RH, no. 1223, Oct. 29, 1894; see also no. 1226, Nov. 3, 1894).
Chapter 9: Lungchow and Pakhoi, 1896-1899

1. ML: HBM to RH, S/O 2, June 26, 1896. A letter from Hart to Campbell, dated April 12, 1896 (Fairbank, Bruner, and Matheson, eds., I.G. in Peking 2:1059), indicates that Morse was at the time considering a post at Szemao after Clark and Spinney had refused it. A few months later Hart informed Campbell that he might choose the next statistical secretary at Shanghai from among three men—Bredon, Rocher, and Morse—“each having special qualifications, and—alas!—the defects of his qualities also.”

2. NCH, July 17, 1885, pp. 76-77. The report was by the Reverend Dr. Wenyan, superintendent of the Wesleyan Mission Hospital at Fatshan, who arrived at Lungchow on April 15, nine days after peace. At the time the town was deserted except for “gambling-house keepers and opium dealers and camp followers.”

3. On the Anglo-French expansion and rivalry in southwestern China, see Eastman, Throne and Mandarin.

4. HBM, Trade and Administration, 3d ed., 33. See also ML: HBM to RH, S/O 6, Aug. 22, 1896; Chinese Customs Service, Decennial Reports, 1892-1901.
5. The bibliography of Eastman’s *Throne and Mandarins* provides an excellent introduction to the vast literature on France’s penetration of southwestern China.


7. ML: HBM to RH, S/O 1, June 10, 1896.


9. ML: HBM to RH, S/O 44, Jan. 22, 1898; S/O 45, Feb. 5, 1898; S/O 60, June 13, 1898. This scheming was a constant theme in Morse’s correspondence.

10. ML: HBM to RH, S/O 28, July 10, 1897.


13. ML: HBM to RH, S/O 5, Aug. 8, 1896; S/O 17, Feb. 9, 1897; S/O 22, April 22, 1897; S/O 37, Oct. 26, 1897; S/O 46, Feb. 21, 1898; S/O 48, March 8, 1898.


15. ML: HBM to RH, S/O 1, June 10, 1896; S/O 5, Aug. 8, 1896; S/O 33, Sept. 9, 1897; S/O 34, Sept. 23, 1897.

16. ML: HBM to RH, S/O 34, Sept. 23, 1897.


18. ML: HBM to RH, S/O 22, April 22, 1897; S/O 31, Aug. 20, 1897.

19. MP: HBM and Nan Morse oral statements to JKF, May 8, 1931.


22. ML: HBM to RH, S/O 52, May 1, 1898.


24. ML: HBM to RH, S/O 1, Aug. 5, 1898.


28. ML: HBM to Bredon, S/O 13, Jan. 9, 1899; HBM to J.A. Van Aalet, the postal secretary, Feb. 7, 1899.


32. Ibid.
33. Janet Morse’s tape-recorded recollections (MP, dictated in 1981-82) indicate that at a certain point Nan began to complain repeatedly about the “outrageous” primitivity of Hosea’s southern postings, but the chronology of her account is unclear. She also says that in Nan’s later years “her husband let it be known what an awful time poor Auntie [Nan] had” when he was sent to various outports as “the only white person.” See also chapter 6, note 43.

34. For some indications of the difficulties, see C.A.S. Williams, Chinese Tribute, 66-67.


36. MP: Janet Morse tapes, 1981-82.


38. ML: HBM to RH, S/O 18, March 25, 1899.

Chapter 10: Yochow, 1899-1900

1. HBM, International Relations of the Chinese Empire 3:159.
3. On Chou Han and others, see Cohen, China and Christianity; and Wehrle, Britain, China and Anti-Missionary Riots. On the many facets of the reform movement in Hunan, see Lewis, Prologue to the Chinese Revolution; and Bays, China Enters the Twentieth Century.
4. See the correspondence in Chang Wen-hsiang kung ch‘ian-chi (Chang Chih-tung’s Collected Writings) between May 1898 and January 1899. We are indebted to Dr. Lin Man-houng for assistance with this material.
5. Van Slyke (Yangtze, 60) notes that the Hsiang, connected via the “Miracle Canal” with the Kwei River, provided a direct river route to Canton.
6. Bird, Yangtze Valley and Beyond, 80.
7. Parsons, American Engineer in China, 81-82.
8. HBM, International Relations of the Chinese Empire 3:159.
12. HBM, International Relations of the Chinese Empire 3:159.
15. MP: RH to Drew, Feb. 8, 1899.
16. Ibid. See also HBM, International Relations of the Chinese Empire 3:158-59, n9.
17. ML: RH to HBM, April 13, 1899.
18. ML: HBM to Bredon, April 25, 1899.
19. ML: HBM to RH from Hankow, April 25, 1899. Since the Yochow port was not yet in existence, there were no semiofficial letters—merely informal ones, mostly in diary form.
20. On Chang, see Bays, China Enters the Twentieth Century; and Ayers, Chang Chih-tung and Educational Reform in China.
21. ML: HBM to RH from Hankow, April 25, 1899.
22. On the spirit and stratagems of the German advance, see Schrecker, Imperialism and Chinese Nationalism.
23. ML: HBM to RH from Hankow, April 25, 1899. See also HBM to Bredon, May 12, 1899, letter with Yochow diary enclosure.
24. ML: HBM to RH from Hankow, April 25, 1899.
25. Ibid.; ML: HBM to Bredon, April 25, 1899.
26. ML: HBM to RH, S/O 1, Nov. 17, 1899.
27. ML: HBM to RH, Oct. 25, 1899. See also Morse's published report in Yochow—Custom-House Opened.
29. HBM, Trade and Administration, 3d ed., 251-52.
30. ML: HBM to RH, S/O 2, May 4, 1899; Sept. 2 and 24, 1899; Oct. 16 and 25, 1899.
31. ML: HBM to Bredon, April 30, 1899, diary.
32. ML: HBM to RH, July 28, 1899, diary.
33. ML: HBM to Bredon, Sept. 7, 1899. The superintendent's name was D. MacLennan.
34. Ibid.
35. HBM, Trade and Administration, 3d ed., 251-52.
37. ML: HBM to RH, June 7, 1899, diary. Morse pointed out that if likin were abolished in favor of payment of transit dues, thus damaging the provincial revenues, "it might perhaps be arranged that a fixed proportion of duties be assigned to provincial use in proportion of value of net trade as shown by Customs returns." "He also deprecated "any increase of export duties," since China was dependent on exports to pay its debt.
38. These interests are touched upon in Lewis, Prologue to the Chinese Revolution, 118-20.
40. ML: HBM to RH, June 17, 1899, diary.
41. Ibid.
42. ML: HBM to RH, June 13, 1899, diary.
43. ML: RH to HBM, Oct. 16, 1899.
Notes to Pages 157-164

Chapter 11: Long Leave and Resumption of Duty, 1900-1903

1. Harvard University, Class of 1874 reports, thirty-fifth reunion report, June 1909.
2. See MP: documents in the Janet Morse (Donnelly) file, particularly her tapes dictated in 1981-82 (partially transcribed by JKF and others).
3. MP: A.D. Morse to HBM, May 1893.
4. MP: A.D. Morse to HBM, Aug. 16, 1893.
5. MP: A.D. Morse to HBM, Aug. 24, 1893.
6. Ibid.
7. Ibid.
8. SL: Anna Spinney to her mother, Oct. 3, 1893.
10. From a telephone conversation between Jean Donnelly Osborne (Janet’s daughter) and MHC, April 14, 1993.
11. MP: HBM to A.D. Morse, Feb. 24, 1894. Janet later described her father as a person who was “a little careless and let things slip,” although she did not remember him personally (MP: Janet Morse tapes, 1981-82).
12. MP: AW to MHC, Nov. 26, 1989. If Nan indeed preferred Bertie to Janet, and
Bertie was such a “goody-goody”—as Janet asserts (MP: Janet Morse tapes, 1981-82)—we may wonder why the Morses kept Janet only.

13. MP: Janet Morse tapes, 1981-82. A fascinating letter from Nan to Lindsay Pancoast Zimmerman (her cousin), dated January 2, 1938, displays a deep understanding of the importance of direct parenting. In trying to dissuade Lindsay from leaving her child in the care of another person so that she could work outside the home, Nan wrote: “You ought not to desert your home and children, these are the formative years of their lives, [and] if you are not there for them to turn to in their perplexities what part have you in the formation of their characters?” She went on to recall a time in Tientsin during the 1880s, when “the only daughter of an old Scotch couple came out to them from home where she had been left with grandparents from the age of five up.” Nan then related her touching conversation with the child, who told her: “Mrs. Morse, I try my utmost that my parents shall not know but I cannot help it that my grandparents are parents to me, & my parents are strangers.” Nan ended her letter by offering Lindsay enough money to induce her to “go back to your home & children” MP.

18. Janet described her uncle as a “no-nonsense” type of person, at least in China (MP: Janet Morse tapes, 1981-82).
19. Ibid.
20. Ibid.
21. ML: RH to HBM, June 24, 1901.
22. Ibid.
23. ML: RH to HBM, Dec. 12, 1902.
24. ML: HBM to Bredon, with attachment to no. 2 for RH, S/O 1-2, Jan. 30 and Feb. 12, 1903; S/O 3, Feb. 26, 1903; S/O 6-7, April 8 and 23, 1903.
25. ML: HBM to Bredon, S/O 5, March 26, 1903.
27. ML: HBM to RH, S/O 1, Jan. 30, 1903; see also Coates, China Consuls, 379-80.
28. ML: HBM to RH, S/O 1, May 10, 1903. See also HBM to Bredon, S/O 11-12, Oct. 4 and 18, 1903. On discovering that most of the foreigners were after separate concessions, Morse suggested establishing a general settlement along the lines of Shanghai or Yochow.
29. ML: HBM to Bredon, S/O 5, March 26, 1903.
30. See S.F. Wright, Hart and the Chinese Customs, chap. 22, esp. 747 ff.
32. HFML: Merrill, at Wuhu, to RH, March 21, 1903.
Chapter 12: Heading the Statistical Department, 1904-1908

1. See chapter 9, note 1.
3. MP: HBM to Piry, Feb. 6, March 14, April 22 and 23, June 2, 1904; HBM to Campbell, June 2, 1904. Piry was head of the post office.
4. MP: HBM to RH, Jan. 4, 1905.
5. MP: HBM to RH, Dec. 11, 1904. For a somewhat different perspective on the problems at Sinza, consult Fairbank, Bruner, and Matheson, eds., I.G. in Peking 2:1485, RH to Campbell, Nov. 5, 1905.
10. Ibid.
11. Ibid. See also ML: HBM to RH, S/O 8, May 29, 1904.
13. See Remer, Foreign Trade of China; idem, Foreign Investment in China.

15. See Hamashita, *Economic History of Modern China*, 2-3, 6-9, 17-18, etc.

16. MP: HBM to RH, Jan. 24, 1904. Although Shanghai waters still posed the threat of schistosomiasis, Morse apparently avoided infection for a time. Yet even without getting a new dose, it would have taken quite a while for existing internal parasites to begin to work their way out of his system.

17. ML: HBM to RH, Feb. 7 and Feb. 21, 1904.

18. ML: HBM to RH, May 29 and June 22, 1904.

19. ML: HBM to RH, July 3, 1904.

20. ML: HBM to RH, March 27, 1905.

21. Janet Morse's taped reminiscences of 1981-82 (in MP) repeatedly stress the similarity between her own experiences at Shanghai and those of Pearl S. Buck (see Buck, *My Several Worlds*, 72).


23. Ibid., 81.


25. See note 30 below.

26. *The North China Herald* for 1905 provided detailed coverage of these events.


28. Ibid., 689.

29. MP: Janet Morse tapes, 1981-82.

30. Hart, Journals, 1907 (no. 76), enclosure: HBM to RH, Dec. 24, 1907. See also MP: RH to HBM, Sept. 12, 1907: “I am sorry to hear Mrs. Morse’s health still suffers from the way in which the 1905 riot affected it.”

31. ML: HBM to RH, July 15, 1905.

32. On June 14, 1906, for example, he presided over the annual NCBRAS meeting and reviewed the past fifty years of such gatherings.

33. HBM, review of Hinckley, 239-45.

34. NCBRAS annual meeting announcement, April 4, 1907.

35. MP: Journal of the American Association of China 2.5. no. 20, p. 6, “Secretary Taft’s Visit to Shanghai.”

36. Ibid., pp. 9-10.

37. Ibid., pp. 18-19.

38. Ibid., pp. 20-33.


40. Ibid., p. 47.

41. MP: RH to HBM, Sept. 12, 1907.

42. MP: RH to HBM, Dec. 20, 1907.

43. Hart, Journals, 1907 (no. 76), enclosure: HBM to RH, Dec. 24, 1907.

44. TC: HBM to CFT, July 14, 1908.

45. DL: Richard Henry Dana III to President Theodore Roosevelt, April 22, 1908.
Chapter 13: Morse's Second Career, 1909-1934

1. TC: HBM to CFT, Jan. 25, 1909.
2. Ibid.
3. TC: HBM to CFT, Aug. 18, 1909.
4. Ibid.
6. DL: Verses Read at the Thirty-fifth Anniversary Dinner at the Union Club, Boston, June 29, 1909, pamphlet printed at the direction of the class, George P. Sanger, class secretary, July 26, 1909.

46. Roosevelt presidential papers.
47. TC: HBM to CFT, June 20, 1908. Anne Welsford describes Nan Morse as "remarkably strong-minded over dental treatment." Once, when Anne's mother had to go to Mrs. Morse's dentist for an extraction, the dentist said to her: "Would you like to have yours out Mrs. Morse's way? She always asks me to pull it slowly" (MP: AW to MHC, Jan. 24, 1990).
48. TC: HBM to CFT, July 9, 1929. A.C. Coolidge played a major role at Harvard in establishing Russian and Eastern European history and a minor role in setting up Asian studies. He visited China several times—twice when his older brother, John Gardner Coolidge, was a member of the Peking legation from 1902 to 1906. Coolidge Hall, which presently houses the Fairbank Center for East Asian Research, is named for him.
49. TC: HBM to CFT, July 27, 1908.
50. Ibid.
51. TC: HBM to CFT, Sept. 13, 1908. See "Dyer, Louis: Obituary," 26-27. It notes that Dyer had "a wide circle of friends" and "a genius for friendship and sympathy," which led him to be known as "American Consul in Oxford." He had come as a Rhodes Scholar in 1875 and received his B.A. in 1878. He taught classics for a time in America but eventually married an Englishwoman and came permanently to Oxford in 1890.
52. MP: AW to MHC, Jan. 24, 1990. Anne was a Cambridge University graduate in archeology and English literature. She taught the latter for many years until her retirement. She died on April 27, 1992.
53. TC: HBM to CFT, Oct. 17, 1908.
54. MP: telegram from George Marcus, Jan. 20, 1909. The initiative for this request was taken by a Melville Stone, then head of the Associated Press.
55. TC: HBM to CFT, June 25, 1909.
58. TC: HBM to CFT, July 9, 1929.
7. MP: RH to HBM, Nov. 30, 1909; see also RH to HBM, Sept. 12 and Dec. 20, 1907, on Morse’s “excellent work.”
9. According to Fairbank’s notes, “The Morses spent 1911 (Dec. 1910 to Nov. 1911) in Munich ‘under medical treatment.’ Dec. 1911 to April 1912 they spent in Gardone, Italy; May 1912 to April 1913 in Switzerland” (MP).
10. TC: E.B. Drew to CFT, Jan. 16 and 18, 1911. Drew wrote from Cambridge, Massachusetts, where he had retired.
11. TC: Nan Morse to CFT, March 14, 1911.
12. Janet Morse said that Nan “got so impatient with being in one place. Her health was bad. . . . The water was upsetting her, or the heat, or something, and so we’d move around” (MP: Janet Morse tapes, 1981-82).
13. TC: HBM to CFT, Jan. 28, 1912.
14. Ibid.
15. Ibid.
16. TC: HBM to CFT, Sept. 22, 1912. See E.P. Young, The Presidency of Yuan Shih-k’ai; also MacKinnon, Power and Politics in Late Imperial China.
17. TC: HBM to CFT, Sept. 22, 1912.
18. TC: HBM to CFT, Feb. 21, 1912.
19. TC: HBM to CFT, Sept. 22, 1912.
20. MP: Sarah E. Welsford (Nan’s sister-in-law) to Janet Morse, July 24, 1934. This letter refers to several other complaints by Nan against Janet. Janet’s tape-recorded recollections of 1981-82 do not mention the incident.
21. Janet Morse spent two years in the house of a retired Indian Civil Service judge, Hamilton Hervey, where she ran the household, cared for the children, and was greatly liked by the family. During World War I Janet joined the Women’s Auxiliary Corps and thereafter worked for the League of Nations in London. In 1920 she emigrated to Canada. In Winnipeg, near the Lake of the Woods, she met a professional guide named James Donnelly. She married him, had three children, and lived a happy and simple frontier life (MP: Janet Morse [Donnelly] file). Bertie apparently remained in New Zealand until the early 1950s, whereupon he moved to Southampton, England. See note 92 below.
22. TC: HBM to CFT, Sept. 22, 1912.
23. Ibid.
24. TC: HBM to CFT, Dec. 1, 1912.
25. TC: HBM to CFT, March 9, April 13 and May 25, 1913.
26. MP: Western Reserve University LL.D. citation dated June 12, 1913.
27. HBM, “Repayment by the West of Its Debt to the East.” It should be noted that the goal of “a government existing for the benefit of the people” was also a Confucian one.
28. TC: HBM to CFT, Nov. 23, 1913; see also June 19, 1913.
29. TC: HBM to CFT, from his house Naia Koti, Jan. 22, 1914.
30. TC: HBM to CFT, June 29, 1913.
31. TC: HBM to CFT, Nov. 23, 1913.
32. TC: HBM to CFT, Jan. 22, 1914.
34. MP: HBM to AW, Oct. 28, 1928.
35. MP: HBM to AW, May 8, 1929.
38. See TC, throughout.
39. MP: Olivia Hunt to John L. McIntosh, Jan. 18, 1915; John L. McIntosh to HBM, March 11, 1915.
40. TC: HBM to CFT, Sept. 6, 1914.
42. MP: AW to MHC, Nov. 29, 1989; AW to JKF, July 31, 1988.
43. TC: HBM to CFT, Oct. 4, 1914.
44. TC: HBM to CFT, Dec. 24, 1914.
45. TC: HBM to CFT, Oct. 23 and Dec. 24, 1914.
46. TC: HBM to CFT, April 4, 1915.
47. Ibid.
48. Ibid.
49. TC: HBM to CFT, Nov. 18, 1917. He is quoting Harvard president Charles W. Eliot.
50. TC: HBM to CFT, Oct. 4, 1914.
51. TC: HBM to CFT, July 23, 1916.
53. Ibid.
54. Ibid.
55. TC: HBM to CFT, March 26, 1916.
56. TC: HBM to CFT, May 14, 1916. Thayer was a professor of history at Harvard.
57. TC: CFT to HBM, Feb. 6, 1917.
58. TC: CFT to HBM, March 2, 1918.
59. TC: HBM to CFT, May 11, 1919.
60. On the Ever-Victorious Army, see Smith, Mercenaries and Mandarins.
61. TC: HBM to CFT, May 2, 1920. See also MP: 1924 résumé of HBM.
64. TC: HBM to CFT, Nov. 28 and 30, 1921.
67. TC: HBM to CFT, May 2, 1920.
68. TC: HBM to CFT, Aug. 6, 1922.
69. TC: CFT to Merrill, Nov. 14, 1924.
70. TC: Drew to CFT, Dec. 1, 1923.
71. TC: Merrill to CFT, Dec. 10, 1923.
72. TC: CFT to Merrill, Nov. 14, 1923.
73. Harvard Univ. Archives, Pusey Library. The others then honored included Owen D. Young, adviser to presidents, Edward Terry Sanford, associate justice of the Supreme Court, and Roland William Boyden, distinguished Boston lawyer and Harvard overseer.
74. TC: HBM to CFT, June 5, 1924.
75. TC: HBM to CFT, Nov. 23, 1924.
76. TC: HBM to CFT, Dec. 16, 1924.
77. TC: HBM to CFT, Nov. 23, 1924.
78. TC: HBM to CFT, Oct. 7 and Feb. 14, 1926.
79. TC: HBM to CFT, April 26, 1926.
80. TC: HBM to CFT, July 11, 1926.
81. TC: HBM to CFT, Oct. 11, 1925.
82. TC: HBM to CFT, March 11, 1928.
83. MP: AW's comments on the letters from HBM to CFT, undated.
86. MP: HBM to the Colonial Society of Massachusetts, May 12, 1929 (copy).
87. TC: HBM to CFT, Oct. 11, 1925.
88. TC: HBM to CFT, April 25, 1929.
89. Ibid. See also HBM and MacNair, *Far Eastern International Relations*.
90. TC: HBM to CFT, April 25, 1929.
91. MP: Janet Morse Donnelly to Nan Morse, March 1934.
92. Nan, still embittered toward Janet, dictated a reply to Sarah Welsford for transmission; MP: Sarah Welsford to Janet Morse Donnelly, May 9, 1934. See also the letter to Janet from her brother, Bertie, dated December 20, 1953. By 1953 Bertie had moved from New Zealand to Southampton, England. Married twice, he had a daughter, Monica, who emigrated to Canada with her son. Nan once gave Bertie some money and his uncle’s cuff links, but when he offered to visit her, she termed him presumptuous and turned him away.

Chapter 14: Morse as Historian

1. We have moved the relatively small number of John Fairbank’s citations into the text for ease of reference. Otherwise this is his original evaluation, with some fairly minor editorial changes.

Afterword

1. On Morse’s effort to seek intellectual renewal through the minds of the young, see TC: HBM to CFT, Aug. 18, 1932.
3. Ibid. See also MP: AW to Lindsay Pancoast Zimmerman, June 15, 1973.
5. See, for example, MP: Lindsay Pancoast Zimmerman to JKF, Aug. 2, 1988; also Sarah Welford to Janet Morse Donnelly, July 24, 1934.
7. MP: Janet Morse tapes, 1981-82.
10. MP: Janet Morse tapes, 1981-82.
12. Before this point we have no clear contemporary evidence of Nan’s instability. Janet’s tape-recorded recollections of 1981-82, although extremely valuable in many respects, are disjointed and therefore unreliable from the standpoint of chronology. Cf. note 13 below.
13. MP: AW to MHC, Jan. 24, 1990. See also Lal (Nan’s youngest sister) to Janet, Feb. 28, 1934: “[Nan] was always a borderline case but I am not sure she hasn’t stepped across.”
16. See MP: AW to MHC, Jan. 24, 1990. For Nan’s paranoid response to Fairbank, see Evans, John Fairbank and the American Understanding of Modern China, 36. A note by Fairbank dated December 1986 refers to some letters that had been removed from Morse’s files, “to be copied for Mrs. Morse (AJM) as part of her campaign after his death to prove that I had misused materials he gave me.”
17. See Dana’s account of his London lunch with Morse on June 28, 1926, in which he remarks that “this time I felt a strong affection for him as well as admiration.” Dana, “Journal . . . of R.H. Dana III and his second wife in the Massachusetts Historical Society Archives.
20. Compare Bruner, Fairbank, and Smith, eds., Entering China’s Service, 330; and TC: HBM to CFT, July 14, 1908. See also MP: HBM to JKF, Feb. 4, 1932.
21. Note especially her remark to Fairbank in his Chinabound, 20.
23. See Smith, Fairbank, and Bruner, eds., Robert Hart and China's Early Modernization; and HBM, “Repayment by the West of Its Debt to the East,” 134.
24. For examples of Morse's bibliographic advice, see MP: HBM to JKF, Jan. 25, Feb. 4, and June 5, 1932.
25. Perhaps Morse's long experience in the British-dominated Chinese Customs, together with his own history as a British subject, predisposed Morse toward British sources.
27. For these and other criticisms, consult, for example, Rowe, Hankow; and Hao, Commercial Revolution in Nineteenth-Century China.
29. MP: HBM to JKF, Nov. 1, 1930.
30. MP: HBM to JKF, March 1, 1931.
31. TC: HBM to CFT, Aug. 6, 1922. See also Cohen and Goldman, comps., Fairbank Remembered, 113-14, 119-20; Evans, John Fairbank and the American Understanding of Modern China, 16.
32. MP: HBM to JKF, April 17, 1933. See also Sept. 22, 1932, p. 77.
33. See, for example, MP: JKF to HBM, March 3, June 19, 1932, etc.
34. MP: HBM to JKF, Jan. 24, 1931, p. 23; July 13, 1933. See also Evans, John Fairbank and the American Understanding of Modern China, 52.
35. MP: HBM to JKF, Sept. 20, 1932; see also Cohen and Goldman, comps., Fairbank Remembered, 57, 79, 99, 104, etc.
37. MP: JKF to HBM, June 19, 1932; HBM to JKF, July 14, 1932.
38. MP: HBM to JKF, July 26, 1933.
39. Evans, John Fairbank and the American Understanding of Modern China, xiv.
40. See ibid., 329, for another view.
41. Ibid., 20; MP: HBM to JKF, Dec. 12, 1932.
42. Cohen and Goldman, comps., Fairbank Remembered, 132.
43. Evans, John Fairbank and the American Understanding of Modern China, 38; Fairbank, Chinabound, 95.
44. MP: HBM to JKF, Dec. 19, 1931; Cohen and Goldman, comps., Fairbank Remembered, 226.
45. See MP: HBM to JKF, Dec. 22, 1932, p. 78; Cohen and Goldman, comps., Fairbank Remembered, 104.
46. Fairbank, Chinabound, 447.
47. Cohen and Goldman, comps., Fairbank Remembered, 123.
48. TC: HBM to CFT, Nov. 28, 1921.
Bibliographic Notes

John K. Fairbank

The Value of the Customs Correspondence

One of the great untapped reservoirs of information on the economy, finances, and politics of late imperial China is the file of English-language letters from the commissioners to the inspector-general. Only after Hart’s retirement were there Chinese commissioners of customs. Each of the thirty to forty commissioners at the treaty ports wrote a more or less fortnightly personal, semiofficial letter to the I.G., summarizing under various headings the events and problems of the commissioner’s work. These included personal reports of interviews with Chinese officials as well as the economic and political situation in general. The commissioner would report especially upon his contact with the chief officials of the region, to whom he served usually as an adviser with reference particularly to taxation, to development of trade and industries, including mining, and to relations with foreign consuls in the local scene. The customs commissioner, in short, was a foreign employee of the Chinese government who did not claim high status in the local official hierarchy but rather a special status as a channel of contact with Hart at Peking. Most commissioners seemed to have acquired from Robert Hart a wide interest in projects for development and modernization. The result of this type of correspondence, in addition to the official dispatches of the Customs Service, was to give Hart his own network of intelligence from all over the empire.

The half dozen or more series of special monographs in the Customs publication program, as well as the Returns of Trade and the Decennial Reports, have long been relied upon as important sources for the late nineteenth century. The Customs archives that were collected in the 1930s
at Shanghai from all the ports provide a much more detailed view of the local scene at each place open to trade.

**Provenance of the Typed Transcripts of the Morse Letter Books**

The transcripts of the Morse letter books are to be distinguished from the "Morse Collection" of letters from Hart as I.G. to his commissioners, which Morse collected from the commissioners. Morse had typed copies made of these letters, and I believe he returned the originals to the commissioners in question. From this typed copy of Hart letters, Morse then marked out or cut out certain passages to be used in the footnotes of volumes 2 and 3 of *The International Relations of the Chinese Empire*, as he explains in his foreword. The typed transcripts that he sent to Harvard were photocopied years ago in the course of producing the volumes of *The I.G. in Peking* and were given stamped numbers in sequence from 2970 to 3403.

Dr. Morse gave me his letter books in 1931 before I left for China in early 1932. I recall having some copying done by typists in London, but I am not sure if this was the beginning of making the transcripts that are now in Houghton Library. I do know that I set up the preparation of these transcripts as a major project in Peking about 1933, with a view to giving a copy to the Tsing Hua Library through Dr. T.F. Tsiang. My reasoning was that these files were of historic interest primarily to China and in fact were created by Chinese employees in the first instance.

To secure the typed transcript of the holograph Morse letter books, I had to employ typists in Peking. I believe one at the time—the only one I recall—was Francis Hsu (Hsu Lang-kuang), who has since become a professor at Northwestern University, distinguished for his studies of Chinese and American psychology and relations. Some of the student typists recommended by T.F. Tsiang were not very adept either at English or at typing, and the carbon copy that I retained from this exercise is therefore an extremely faulty text. We thus confront several sources of error: first, the letter books had already begun to spread their pressed copy ink over the fragile paper on which they had been made (by this time I believe they are beyond legibility). Second, the typists made many typographic errors, including sometimes the substitution of a wrong word, as one can infer from the context. Third, the transcript that I deposited at Harvard which has since been microfilmed, was faulty because of poor carbon paper. Nevertheless, these difficulties can generally be overcome by a knowledgeable reader.
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