

# History guide

First examinations 2017





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# Diploma Programme

## History guide

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## IB mission statement

The International Baccalaureate aims to develop inquiring, knowledgeable and caring young people who help to create a better and more peaceful world through intercultural understanding and respect.

To this end the organization works with schools, governments and international organizations to develop challenging programmes of international education and rigorous assessment.

These programmes encourage students across the world to become active, compassionate and lifelong learners who understand that other people, with their differences, can also be right.



# IB learner profile

The aim of all IB programmes is to develop internationally minded people who, recognizing their common humanity and shared guardianship of the planet, help to create a better and more peaceful world.

As IB learners we strive to be:

## INQUIRERS

We nurture our curiosity, developing skills for inquiry and research. We know how to learn independently and with others. We learn with enthusiasm and sustain our love of learning throughout life.

## KNOWLEDGEABLE

We develop and use conceptual understanding, exploring knowledge across a range of disciplines. We engage with issues and ideas that have local and global significance.

## THINKERS

We use critical and creative thinking skills to analyse and take responsible action on complex problems. We exercise initiative in making reasoned, ethical decisions.

## COMMUNICATORS

We express ourselves confidently and creatively in more than one language and in many ways. We collaborate effectively, listening carefully to the perspectives of other individuals and groups.

## PRINCIPLED

We act with integrity and honesty, with a strong sense of fairness and justice, and with respect for the dignity and rights of people everywhere. We take responsibility for our actions and their consequences.

## OPEN-MINDED

We critically appreciate our own cultures and personal histories, as well as the values and traditions of others. We seek and evaluate a range of points of view, and we are willing to grow from the experience.

## CARING

We show empathy, compassion and respect. We have a commitment to service, and we act to make a positive difference in the lives of others and in the world around us.

## RISK-TAKERS

We approach uncertainty with forethought and determination; we work independently and cooperatively to explore new ideas and innovative strategies. We are resourceful and resilient in the face of challenges and change.

## BALANCED

We understand the importance of balancing different aspects of our lives—intellectual, physical, and emotional—to achieve well-being for ourselves and others. We recognize our interdependence with other people and with the world in which we live.

## REFLECTIVE

We thoughtfully consider the world and our own ideas and experience. We work to understand our strengths and weaknesses in order to support our learning and personal development.

The IB learner profile represents 10 attributes valued by IB World Schools. We believe these attributes, and others like them, can help individuals and groups become responsible members of local, national and global communities.



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## Purpose of this document

This publication is intended to guide the planning, teaching and assessment of the subject in schools. Subject teachers are the primary audience, although it is expected that teachers will use the guide to inform students and parents about the subject.

This guide can be found on the subject page of the online curriculum centre (OCC) at [www.occ.ibo.org](http://www.occ.ibo.org), a password-protected IB website designed to support IB teachers. It can also be purchased from the IB store at [www.store.ibo.org](http://www.store.ibo.org).

## Additional resources

Additional publications such as specimen papers and markschemes, teacher support materials, subject reports and grade descriptors can also be found on the OCC. Past examination papers as well as markschemes can be purchased from the IB store.

Teachers are encouraged to check the OCC for additional resources created or used by other teachers. Teachers can provide details of useful resources, for example, websites, books, videos, journals or teaching ideas.

## Acknowledgment

The IB wishes to thank the educators and associated schools for generously contributing time and resources to the production of this guide.

**First assessment 2017**

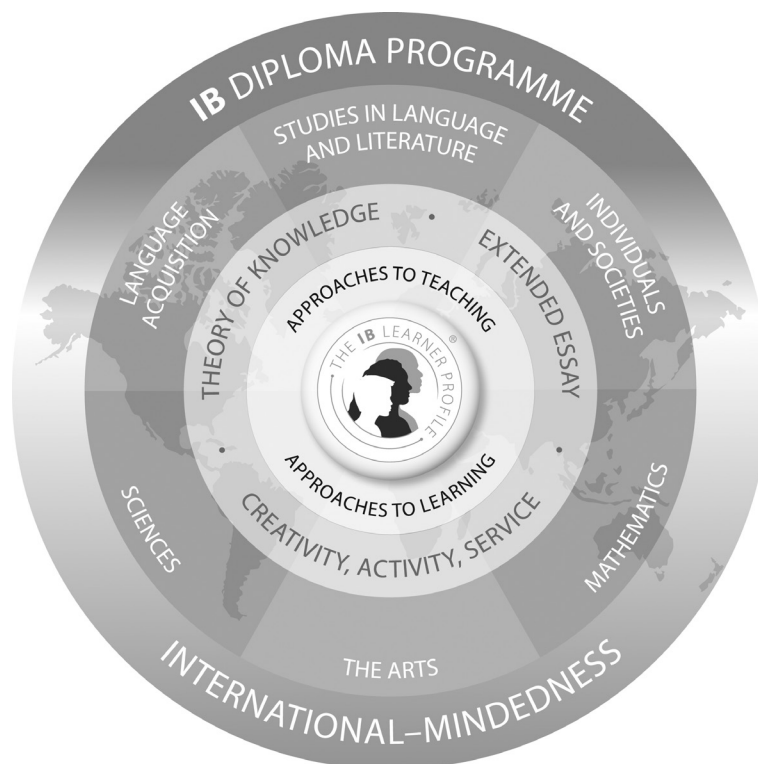


# The Diploma Programme

The Diploma Programme (DP) is a rigorous pre-university programme designed for students in the 16 to 19 age range. It is a broad-based two-year programme that aims to encourage students to be knowledgeable and inquiring, but also caring and compassionate. There is a strong emphasis on encouraging students to develop intercultural understanding, open-mindedness, and the attitudes necessary for them to respect and evaluate a range of points of view.

## Programme model

The course is presented as six academic areas enclosing a central core (see figure 1). It encourages the concurrent study of a broad range of academic areas. Students study two modern languages (or a modern language and a classical language), a humanities or social science subject, a science subject, mathematics and one of the creative arts. It is this comprehensive range of subjects that makes the DP a demanding course of study designed to prepare students effectively for university entrance. In each of the academic areas students have flexibility in making their choices, which means they can choose subjects that particularly interest them and that they may wish to study further at university.



**Figure 1**  
*Diploma Programme model*

## Choosing the right combination

Students are required to choose one subject from each of the six academic areas, although they can, instead of an arts subject, choose two subjects from another area. Normally, three subjects (and not more than four) are taken at higher level (HL), and the others are taken at standard level (SL). The IB recommends 240 teaching hours for HL subjects and 150 hours for SL. Subjects at HL are studied in greater depth and breadth than at SL.

At both levels, many skills are developed, especially those of critical thinking and analysis. At the end of the course, students' abilities are measured by means of external assessment. Many subjects contain some element of coursework assessed by teachers.

## The core of the Diploma Programme model

All DP students participate in the three course elements that make up the core of the model.

Theory of knowledge (TOK) is a course that is fundamentally about critical thinking and inquiry into the process of knowing rather than about learning a specific body of knowledge. The TOK course examines the nature of knowledge and how we know what we claim to know. It does this by encouraging students to analyse knowledge claims and explore questions about the construction of knowledge. The task of TOK is to emphasize connections between areas of shared knowledge and link them to personal knowledge in such a way that an individual becomes more aware of his or her own perspectives and how they might differ from others.

Creativity, activity, service (CAS) is at the heart of the DP. CAS enables students to live out the IB learner profile in real and practical ways, to grow as unique individuals and to recognize their role in relation to others. Students develop skills, attitudes and dispositions through a variety of individual and group experiences that provides students with opportunities to explore their interests and express their passions, personalities and perspectives. CAS complements a challenging academic programme in a holistic way, providing opportunities for self-determination, collaboration, accomplishment and enjoyment. The three strands of CAS are given below.

Creativity—exploring and extending ideas leading to an original or interpretive product or performance

Activity—physical exertion contributing to a healthy lifestyle

Service—collaborative and reciprocal engagement with the community in response to an authentic need

The extended essay, including the world studies extended essay, offers the opportunity for IB students to investigate a topic of special interest, in the form of a 4,000-word piece of independent research. The area of research undertaken is chosen from one of the students' six DP subjects, or in the case of the interdisciplinary world studies essay, two subjects, and acquaints them with the independent research and writing skills expected at university. This leads to a major piece of formally presented, structured writing, in which ideas and findings are communicated in a reasoned and coherent manner, appropriate to the subject or subjects chosen. It is intended to promote high-level research and writing skills, intellectual discovery and creativity. An authentic learning experience, it provides students with an opportunity to engage in personal research on a topic of choice, under the guidance of a supervisor.

## Approaches to teaching and learning

Approaches to teaching and learning across the DP refers to deliberate strategies, skills and attitudes that permeate the teaching and learning environment. These approaches and tools, intrinsically linked with the learner profile attributes, enhance student learning and assist student preparation for the DP assessment and beyond. The aims of approaches to teaching and learning in the DP are to:

- empower teachers as teachers of learners as well as teachers of content
- empower teachers to create clearer strategies for facilitating learning experiences in which students are more meaningfully engaged in structured inquiry and greater critical and creative thinking
- promote both the aims of individual subjects (making them more than course aspirations) and linking previously isolated knowledge (concurrency of learning)
- encourage students to develop an explicit variety of skills that will equip them to continue to be actively engaged in learning after they leave school, and to help them not only obtain university admission through better grades but also prepare for success during tertiary education and beyond
- enhance further the coherence and relevance of the students' DP experience
- allow schools to identify the distinctive nature of a DP education, with its blend of idealism and practicality.

The five approaches to learning (developing thinking skills, social skills, communication skills, self-management skills and research skills) along with the six approaches to teaching (teaching that is inquiry-based, conceptually focused, contextualized, collaborative, differentiated and informed by assessment) encompass the key values and principles that underpin IB pedagogy.

## Academic honesty

Academic honesty in the DP is a set of values and behaviours informed by the attributes of the learner profile. In teaching, learning and assessment, academic honesty serves to promote personal integrity, engender respect for the integrity of others and their work, and ensure that all students have an equal opportunity to demonstrate the knowledge and skills they acquire during their studies.

All coursework—including work submitted for assessment—is to be authentic, based on the student's individual and original ideas with the ideas and work of others fully acknowledged. Assessment tasks that require teachers to provide guidance to students or that require students to work collaboratively must be completed in full compliance with the detailed guidelines provided by the IB for the relevant subjects.

For further information on academic honesty in the IB and the DP, please consult the IB publications *Academic honesty in the IB educational context*, *The Diploma Programme: From principles into practice* and *General regulations: Diploma Programme*. Specific information regarding academic honesty as it pertains to external and internal assessment components of the DP history course can be found in this guide.

## Learning diversity and learning support requirements

Schools must ensure that equal access arrangements and reasonable adjustments are provided to candidates with learning support requirements that are in line with the IB documents *Candidates with assessment access requirements* and *Learning diversity in the International Baccalaureate programmes: Special educational needs within the International Baccalaureate programmes*.

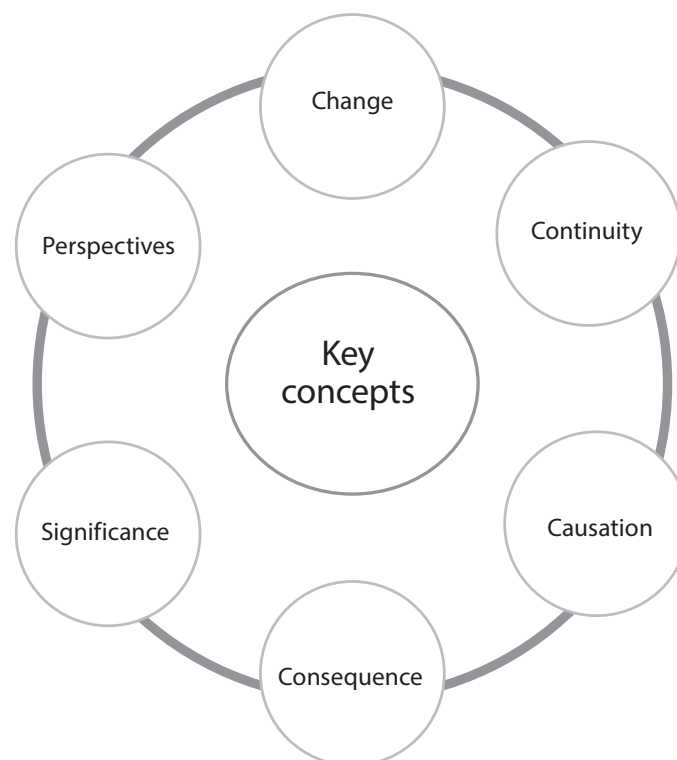
## Nature of the subject

History is a dynamic, contested, evidence-based discipline that involves an exciting engagement with the past. It is a rigorous intellectual discipline, focused around key historical concepts such as change, causation and significance.

History is an exploratory subject that fosters a sense of inquiry. It is also an interpretive discipline, allowing opportunity for engagement with multiple perspectives and a plurality of opinions. Studying history develops an understanding of the past, which leads to a deeper understanding of the nature of humans and of the world today.

The IB Diploma Programme (DP) history course is a world history course based on a comparative and multi-perspective approach to history. It involves the study of a variety of types of history, including political, economic, social and cultural, and provides a balance of structure and flexibility. The course emphasizes the importance of encouraging students to think historically and to develop historical skills as well as gaining factual knowledge. It puts a premium on developing the skills of critical thinking, and on developing an understanding of multiple interpretations of history. In this way, the course involves a challenging and demanding critical exploration of the past.

There are six key concepts that have particular prominence throughout the DP history course.



**Figure 2**  
*Key concepts for DP history*

More information and guidance on these six concepts can be found in the “Key concepts for DP history unpacked” section of this guide, and also in the *History teacher support material*.

## History and international-mindedness

... an education for international-mindedness; an education designed to break down the barriers of race, religion and class; an education that extolled the benefits of cultural diversity; above all else, an education for peace.

(George Walker 2011: 19)

International-mindedness is an umbrella term through which the IB defines the goal of international education, and which is exemplified by the emphasis in all IB programmes on promoting global engagement, multilingualism and intercultural understanding.

The DP history course is designed in such a way as to explicitly reinforce the emphasis on the development of international-mindedness. For example, one of the key concepts that weaves throughout the course is perspectives, and, more specifically, an emphasis on encouraging students to appreciate multiple perspectives. In addition, all students are required to study case studies and examples from different regions of the world, with comparison of such examples helping to ensure that the course adopts a transnational perspective. Teachers also have a great deal of freedom to choose relevant examples to explore with their students, helping to ensure that the course appropriately meets their students' needs and interests regardless of their location or context.

Throughout the DP history course, students have the opportunity to explore historical events that have played a key role in shaping the world today, deepening their understanding of the complex and interconnected nature of past and present events. For example, students explore historical examples of many of the global challenges facing the world today, such as conflict, rights and governance. This helps to meet one of the central aims of the course—to increase students' understanding of themselves and of contemporary society by encouraging reflection on the past.

## Distinction between SL and HL

Students at standard level (SL) and higher level (HL) are presented with a syllabus that has a common core consisting of prescribed subjects and topics in world history. In addition, students at HL are also required to undertake an in-depth study of three sections from one of the HL regional options. While many of the skills of studying history are common to both SL and HL, the difference in recommended teaching hours at SL and HL signals a clear distinction between the demands made on students, with the greater depth of study required for HL.

The difference between the history course at SL and the course at HL can be summarized as follows.

	SL	HL
<b>Syllabus</b>	<ul style="list-style-type: none"> <li>• The study of one prescribed subject from a choice of five</li> <li>• The study of two world history topics from a choice of twelve</li> <li>• A historical investigation</li> </ul>	<ul style="list-style-type: none"> <li>• The study of one prescribed subject from a choice of five</li> <li>• The study of two world history topics from a choice of twelve</li> <li>• The study of three sections from one HL regional option</li> <li>• A historical investigation</li> </ul>

	SL	HL
<b>Assessment</b>	<ul style="list-style-type: none"> <li>• Paper 1: A source-based paper set on the prescribed subjects</li> <li>• Paper 2: An essay paper based on the world history topics</li> <li>• Internal assessment (IA): A historical investigation</li> </ul>	<ul style="list-style-type: none"> <li>• Paper 1: A source-based paper set on the prescribed subjects</li> <li>• Paper 2: An essay paper based on the world history topics</li> <li>• Paper 3: An essay paper on one of the four HL regional options</li> <li>• Internal assessment (IA): A historical investigation</li> </ul>

## History and the core

As with all DP courses, the history course should both support, and be supported by, the three elements of the DP core.

### History and the extended essay

History is one of the most popular subject choices for DP students' extended essays. The research skills developed by completing an extended essay in history benefit students not only in their history course and other DP subjects, but are also excellent preparation for study beyond the DP. Examples of topics for extended essays recently submitted in history include the following.

- To what extent was the American Phoenix Programme a failure in Vietnam between 1965 and 1972?
- How important a factor was topography in the Northern victory at the Battle of Gettysburg?
- How significant was the contribution of urban resistance to the success of the Cuban Revolution?

More information for teachers who are acting as supervisors for students completing extended essays in history can be found in the *Extended essay guide*.

### History and CAS

CAS plays a crucial role in the DP in areas such as the development of personal and interpersonal skills. It also provides an important counterbalance to the academic pressures of the rest of the DP.

Examples of CAS experiences that have links to history include the following.

- A creativity experience creating artwork to accompany a school magazine article commemorating a historical event or figure
- A service experience volunteering at a care home for elderly patients and talking to the residents about their experiences of living through historical events
- A combined activity and service experience organizing and participating in a fun run to raise funds for a veterans charity

More information on CAS can be found in the *Creativity, activity, service guide*.

### History and TOK

History is one of the eight areas of knowledge that are at the centre of the TOK course. It is an interesting area of knowledge because it raises questions such as how far we can speak with certainty about anything



in the past, and whether historians' accounts are necessarily subjective. All of the elements of the history course provide excellent scope for making links to TOK. However, the most explicit link to TOK comes in the internal assessment task (see the "Internal assessment" section of this guide). Students are required to reflect on what completing their historical investigation taught them about the role of methods used by, and challenges facing, the historian. This provides excellent links to TOK, where students will, for example, compare the methods used to gain knowledge in history with the methods used to gain knowledge in other areas of knowledge.

Examples of discussion questions that can be used to make links to TOK include the following.

- What is the role of the historian?
- What methods do historians use to gain knowledge?
- Is it possible to describe historical events in an unbiased way?
- Do we learn from history?
- What is the difference between bias and selection?
- Who decides which events are historically significant?
- To what extent does studying history help us to better understand ourselves in the present?
- What is the role of individuals in history?
- How does the context within which historians live affect historical knowledge?

More information on TOK can be found in the *Theory of knowledge guide*.

## Prior learning

Students need not have studied history prior to starting the DP history course. In particular, it is neither expected nor required that specific subjects have been studied for national or international qualifications in preparation for this course. The specific skills and knowledge required are developed throughout the course itself.

## Links to the Middle Years Programme

History is often offered explicitly as one of the disciplines within the individuals and societies subject group of the IB Middle Years Programme (MYP). Regardless of whether it is history or another discipline from the subject group that is offered, the fundamental concepts of MYP individuals and societies provide a very useful foundation for students who go on to study the DP history course.

MYP individuals and societies is a concept-driven curriculum aimed at helping the learner construct meaning through improved critical thinking and the transfer of knowledge. At the top level are key concepts, which are broad, organizing, powerful ideas that have relevance within the subject but also transcend it, having relevance in other subject groups. These key concepts facilitate both disciplinary and interdisciplinary learning as well as making connections with other subjects.

Across the MYP there are 16 key concepts with the four in **bold** below being the focus for MYP individuals and societies.

The key concepts across the MYP subjects			
Aesthetics	Form	<b>Systems</b>	Communities
Connections	Creativity	Culture	Development
<b>Change</b>	Relationships	Identity	<b>Time, place and space</b>
Perspective	<b>Global interactions</b>	Communication	Logic

# Aims

## Group 3 aims

The aims of all subjects in group 3, individuals and societies, are to:

1. encourage the systematic and critical study of: human experience and behaviour; physical, economic and social environments; the history and development of social and cultural institutions
2. develop in the student the capacity to identify, to analyse critically and to evaluate theories, concepts and arguments about the nature and activities of the individual and society
3. enable the student to collect, describe and analyse data used in studies of society, to test hypotheses and interpret complex data and source material
4. promote the appreciation of the way in which learning is relevant to both the culture in which the student lives and the culture of other societies
5. develop an awareness in the student that human attitudes and opinions are widely diverse and that a study of society requires an appreciation of such diversity
6. enable the student to recognize that the content and methodologies of the subjects in group 3 are contestable and that their study requires the toleration of uncertainty.

## History aims

The aims of the history course at SL and HL are to:

7. develop an understanding of, and continuing interest in, the past
8. encourage students to engage with multiple perspectives and to appreciate the complex nature of historical concepts, issues, events and developments
9. promote international-mindedness through the study of history from more than one region of the world
10. develop an understanding of history as a discipline and to develop historical consciousness including a sense of chronology and context, and an understanding of different historical perspectives
11. develop key historical skills, including engaging effectively with sources
12. increase students' understanding of themselves and of contemporary society by encouraging reflection on the past.

# Assessment objectives

## Assessment objective 1: Knowledge and understanding

- Demonstrate detailed, relevant and accurate historical knowledge.
- Demonstrate understanding of historical concepts and context.
- Demonstrate understanding of historical sources. (Internal assessment and paper 1)

## Assessment objective 2: Application and analysis

- Formulate clear and coherent arguments.
- Use relevant historical knowledge to effectively support analysis.
- Analyse and interpret a variety of sources. (Internal assessment and paper 1)

## Assessment objective 3: Synthesis and evaluation

- Integrate evidence and analysis to produce a coherent response.
- Evaluate different perspectives on historical issues and events, and integrate this evaluation effectively into a response.
- Evaluate sources as historical evidence, recognizing their value and limitations. (Internal assessment and paper 1)
- Synthesize information from a selection of relevant sources. (Internal assessment and paper 1)

## Assessment objective 4: Use and application of appropriate skills

- Structure and develop focused essays that respond effectively to the demands of a question.
- Reflect on the methods used by, and challenges facing, the historian. (Internal assessment)
- Formulate an appropriate, focused question to guide a historical inquiry. (Internal assessment)
- Demonstrate evidence of research skills, organization, referencing and selection of appropriate sources. (Internal assessment)

## Syllabus outline

Syllabus component	Teaching hours	
	SL	HL
<b>Prescribed subjects</b>	40	40
<ol style="list-style-type: none"> <li>Military leaders</li> <li>Conquest and its impact</li> <li>The move to global war</li> <li>Rights and protest</li> <li>Conflict and intervention</li> </ol>		
<b>World history topics</b>	90	90
<ol style="list-style-type: none"> <li>Society and economy (750–1400)</li> <li>Causes and effects of medieval wars (750–1500)</li> <li>Dynasties and rulers (750–1500)</li> <li>Societies in transition (1400–1700)</li> <li>Early Modern states (1450–1789)</li> <li>Causes and effects of Early Modern wars (1500–1750)</li> <li>Origins, development and impact of industrialization (1750–2005)</li> <li>Independence movements (1800–2000)</li> <li>Evolution and development of democratic states (1848–2000)</li> <li>Authoritarian states (20th century)</li> <li>Causes and effects of 20th-century wars</li> <li>The Cold War: Superpower tensions and rivalries (20th century)</li> </ol>		
<b>HL options: Depth studies</b>		90
<ol style="list-style-type: none"> <li>History of Africa and the Middle East</li> <li>History of the Americas</li> <li>History of Asia and Oceania</li> <li>History of Europe</li> </ol>		
<b>Internal assessment</b>	20	20
Historical investigation		
<b>Total teaching hours</b>	<b>150</b>	<b>240</b>

The recommended teaching time is 240 hours to complete HL courses and 150 hours to complete SL courses as stated in the document *General regulations: Diploma Programme*.

## Designing your DP history course

The DP history course offers teachers a great deal of flexibility over the topics they select to teach, allowing teachers to adapt the course to best meet the particular needs and interests of their students. The following pages are intended to help teachers in designing their history course. Additional guidance on putting a DP history course together can also be found in the *History teacher support material*.

### Step 1: Select one prescribed subject

Select one prescribed subject from the list of five (see the “Syllabus outline” section). Each prescribed subject consists of two case studies, each taken from a different region of the world. Both of the case studies specified for the chosen prescribed subject must be studied.



### Step 2: Select two world history topics

Select two topics in world history from the list of twelve (see the “Syllabus outline” section). Each topic provides teachers with a great deal of flexibility in choosing their own examples. However, it should be noted that for each one, topic examples must be studied from more than one region of the world.



### Step 3: For HL only, select one HL regional option

For HL only, select one HL regional option from the list of four (see the “Syllabus outline” section). Three sections must be studied for the chosen regional option, from a choice of eighteen sections per regional option.



### Internal assessment

For both SL and HL, students must complete a historical investigation for their internal assessment task. Students can investigate any historical topic of their choice (see the “Internal assessment” section).

## Example pathways through the course

The following pages contain examples of possible pathways through the course. It should be noted that these are **suggestions only**, intended simply to indicate some of the wide variety of possible pathways through the course. Teachers are encouraged to exercise flexibility, creativity and innovation in the design and delivery of their history course.

### Example pathway A: An HL course with an emphasis on medieval Islamic history

Prescribed subject	World history topics	HL option	Internal assessment
Military leaders	Society and economy (750–1400) Dynasties and rulers (750–1500)	History of Africa and the Middle East: <ul style="list-style-type: none"> <li>The 'Abbasid dynasty (750–1258)</li> <li>The Fatimids (909–1171)</li> <li>The Crusades (1095–1291)</li> </ul>	Student chooses any historical topic to investigate, for example, economic change under the Umayyad Caliphate.

### Example pathway B: An HL course with an emphasis on Early Modern European history

Prescribed subject	World history topics	HL option	Internal assessment
Conquest and its impact	Societies in transition (1400–1700) Causes and effects of Early Modern wars (1500–1750)	History of Europe: <ul style="list-style-type: none"> <li>The Age of Exploration and its impact (1400–1550)</li> <li>The Reformation (1517–1572)</li> <li>Absolutism and Enlightenment (1650–1800)</li> </ul>	Student chooses any historical topic to investigate, for example, the significance of the spread of the printing press in 15th-century Europe.

### Example pathway C: An HL course with an emphasis on 20th-century world history

Prescribed subject	World history topics	HL option	Internal assessment
The move to global war	Authoritarian states (20th century) The Cold War: Superpower tensions and rivalries (20th century)	History of the Americas: <ul style="list-style-type: none"> <li>The Great Depression and the Americas (mid-1920s–1939)</li> <li>The Second World War and the Americas (1933–1945)</li> <li>The Cold War and the Americas (1945–1981)</li> </ul>	Student chooses any historical topic to investigate, for example, the significance of American use of atomic weapons against Japan.



**Example pathway D: An HL course with an emphasis on modern African history**

<b>Prescribed subject</b>	<b>World history topics</b>	<b>HL option</b>	<b>Internal assessment</b>
Rights and protest	Independence movements (1800–2000)  Evolution and development of democratic states (1848–2000)	History of Africa and the Middle East: <ul style="list-style-type: none"> <li>• Africa under colonialism</li> <li>• Nationalist and independence movements in Africa</li> <li>• Developments in South Africa (1880–1994)</li> </ul>	Student chooses any historical topic to investigate, for example, the UN contribution to the stabilization of Mozambique.

**Example pathway E: An HL course with an emphasis on exploration and colonialism**

<b>Prescribed subject</b>	<b>World history topics</b>	<b>HL option</b>	<b>Internal assessment</b>
Conquest and its impact	Societies in transition (1400–1700)  Early Modern states (1450–1789)	History of Asia and Oceania: <ul style="list-style-type: none"> <li>• Exploration, trade and interaction in East Asia and South-East Asia (1405–1700)</li> <li>• Colonialism and the development of nationalism in South-East Asia (c1750–1914)</li> <li>• British colonialism and emerging national identities in Oceania (1788–1919)</li> </ul>	Student chooses any historical topic to investigate, for example, the political and economic impact of the Treaty of Tordesillas.

**Example pathway F: An SL course with an emphasis on the concept of identity**

<b>Prescribed subject</b>	<b>World history topics</b>	<b>Internal assessment</b>
Conflict and intervention	Independence movements (1800–2000)  Causes and effects of 20th-century wars	Student chooses any historical topic to investigate, for example, the social impact of the 1995 Srebrenica massacre.

**Example pathway G: An SL course with an emphasis on 20th-century history**

<b>Prescribed subject</b>	<b>World history topics</b>	<b>Internal assessment</b>
Rights and protest	Authoritarian states (20th century)  Causes and effects of 20th-century wars	Student chooses any historical topic to investigate, for example, the role and significance of Emmeline Pankhurst in the British suffragette movement.

# Syllabus content

## Prescribed subjects

**One** prescribed subject must be chosen for study from the following list.

1. Military leaders
2. Conquest and its impact
3. The move to global war
4. Rights and protest
5. Conflict and intervention

The following pages detail the content that must be studied for each prescribed subject. For each prescribed subject two case studies, from different regions of the world, are identified. **Both** of the case studies for the prescribed subject selected must be studied. Each of the case studies has quite a narrow focus, so it is therefore important that teachers also help students to understand the wider context in which the case study takes place.

The prescribed subjects are assessed on paper 1, which is a source-based examination paper (see the “External assessment” section for more details). It is therefore important that the content for the chosen prescribed subject be explored using a range of original evidence and secondary works, so that students develop the skills required for this component.

## Prescribed subject 1: Military leaders

This prescribed subject focuses on two well-known medieval military leaders, the Mongol leader Genghis Khan and Richard I of England, and on their impact. Two case studies are prescribed, from different regions of the world, and **both** of these case studies must be studied. The first case study focuses on Genghis Khan and the expansion of the Mongol Empire in the early 13th century. The second case study focuses on Richard I of England, from his revolt against his father, Henry II, in 1173 until his death in 1199.

Case studies	Material for detailed study
Case study 1: Genghis Khan c1200–1227	<p>Leadership</p> <ul style="list-style-type: none"> <li>• Rise to power; uniting of rival tribes</li> <li>• Motives and objectives; success in achieving those objectives</li> <li>• Reputation: military prowess; naming as Genghis Khan (1206)</li> <li>• Importance of Genghis Khan's leadership to Mongol success</li> </ul> <p>Campaigns</p> <ul style="list-style-type: none"> <li>• Mongol invasion of China: attacks on the Jin dynasty; capture of Beijing (1215)</li> <li>• Mongol invasion of Central Asia and Iran; Mongol invasion of Khwarezmia (1219–1221)</li> <li>• Mongol military technology, organization, strategy and tactics</li> </ul> <p>Impact</p> <ul style="list-style-type: none"> <li>• Political impact: administration; overthrowing of existing ruling systems; establishment of Mongol law/Yassa; move towards meritocracy</li> <li>• Economic impact: establishment, enhancement and protection of trade routes</li> <li>• Social, cultural and religious impact: population displacement; terror, looting and murdering; raiding and destruction of settlements; religious, cultural and technological exchange; religious freedom under the Mongols</li> </ul>
Case study 2: Richard I of England (1173–1199)	<p>Leadership</p> <ul style="list-style-type: none"> <li>• Rise to power: revolt of Richard I and his brothers against Henry II (1173–1174)</li> <li>• Reputation: military prowess; chivalry; "Richard the Lionheart"</li> <li>• Motives and objectives: defence and recovery of the French lands; defence of the crusader states and recovery of lost territory; success in achieving those objectives</li> </ul> <p>Campaigns</p> <ul style="list-style-type: none"> <li>• Occupation of Sicily (1190–1191); conquest of Cyprus (1191)</li> <li>• Involvement in the Third Crusade (1191–1192)</li> <li>• The course, outcome and effects of Richard I's campaigns in France, the Mediterranean and the Middle East</li> </ul> <p>Impact</p> <ul style="list-style-type: none"> <li>• Political impact in England: absence of the king; political instability; revolt of John and Philip in Richard's absence</li> <li>• Political impact in France: growth in prestige and strength of the Capetian monarchy; expansion of royal control</li> <li>• Economic impact: raising money for campaigns; taxation of clergy; raising of the ransom after his capture and imprisonment by Leopold V, Duke of Austria and Henry VI, Holy Roman Emperor (1193)</li> <li>• Social, cultural and religious impact: anti-Jewish violence; treatment of Muslim prisoners during the Third Crusade</li> </ul>

## Prescribed subject 2: Conquest and its impact

This prescribed subject focuses on Spanish conquest. Two case studies are prescribed, from two different regions of the world, and **both** of these case studies must be studied. The first case study explores the final stages of Muslim rule in the Iberian peninsula. It focuses on the fall of Granada in 1492—the last Islamic state on the peninsula. The second case study focuses on the creation of Spain’s Empire in Latin America through the conquest of Mexico and Peru.

Case studies	Material for detailed study
Case study 1: The final stages of Muslim rule in Spain	<p>Context and motives</p> <ul style="list-style-type: none"> <li>Political context in Iberia and Al-Andalus in the late 15th century; internal conflicts and alliances in Granada in the late 15th century</li> <li>Social and economic context in Iberia and Al-Andalus in the late 15th century; coexistence of population; intercultural exchange; economic decline; heavy taxation</li> <li>Motives: political motives; religious motives and the role of the church</li> </ul> <p>Key events and actors</p> <ul style="list-style-type: none"> <li>The Granada War and the conquest of Granada (1482–1492)</li> <li>Treaty of Granada (1491); Alhambra decree (1492)</li> <li>Key actors: Fernando de Aragón and Isabel de Castilla; Abu Abdallah, last king of Granada</li> </ul> <p>Impact</p> <ul style="list-style-type: none"> <li>Social and demographic changes; persecution, enslavement and emigration; new institutions: <i>encomienda</i>, <i>fueros</i></li> <li>Forced conversions and expulsions; Marranos, Mudéjars</li> <li>The Spanish Inquisition</li> </ul>
Case study 2: The conquest of Mexico and Peru (1519–1551)	<p>Context and motives</p> <ul style="list-style-type: none"> <li>Political and economic motives for exploration and conquest</li> <li>Religious arguments for the conquest</li> </ul> <p>Key events and actors</p> <ul style="list-style-type: none"> <li>Hernán Cortés and the campaign against the Aztec Empire; alliances with indigenous populations</li> <li>Francisco Pizarro and the campaign against the Incas; alliances with indigenous populations</li> <li>Key actors: Diego de Almagro, Malinche, Atahualpa, Moctezuma II; Las Casas against Sepúlveda</li> </ul> <p>Impact</p> <ul style="list-style-type: none"> <li>Social and economic impact on indigenous populations; the <i>encomienda</i> and Mita systems</li> <li>Causes and effects of demographic change; spread of disease</li> <li>Cultural interaction and exchange</li> </ul>

### Prescribed subject 3: The move to global war

This prescribed subject focuses on military expansion from 1931 to 1941. Two case studies are prescribed, from different regions of the world, and **both** of these case studies must be studied. The first case study explores Japanese expansionism from 1931 to 1941, and the second case study explores German and Italian expansionism from 1933 to 1940. The focus of this prescribed subject is on the causes of expansion, key events, and international responses to that expansion. Discussion of domestic and ideological issues should therefore be considered in terms of the extent to which they contributed to this expansion, for example, economic issues, such as the long-term impact of the Great Depression, should be assessed in terms of their role in shaping more aggressive foreign policy.

Case studies	Material for detailed study
Case study 1: Japanese expansion in East Asia (1931–1941)	<p>Causes of expansion</p> <ul style="list-style-type: none"> <li>• The impact of Japanese nationalism and militarism on foreign policy</li> <li>• Japanese domestic issues: political and economic issues, and their impact on foreign relations</li> <li>• Political instability in China</li> </ul> <p>Events</p> <ul style="list-style-type: none"> <li>• Japanese invasion of Manchuria and northern China (1931)</li> <li>• Sino-Japanese War (1937–1941)</li> <li>• The Three Power/Tripartite Pact; the outbreak of war; Pearl Harbor (1941)</li> </ul> <p>Responses</p> <ul style="list-style-type: none"> <li>• League of Nations and the Lytton report</li> <li>• Political developments within China—the Second United Front</li> <li>• International response, including US initiatives and increasing tensions between the US and Japan</li> </ul>
Case study 2: German and Italian expansion (1933–1940)	<p>Causes of expansion</p> <ul style="list-style-type: none"> <li>• Impact of fascism and Nazism on the foreign policies of Italy and Germany</li> <li>• Impact of domestic economic issues on the foreign policies of Italy and Germany</li> <li>• Changing diplomatic alignments in Europe; the end of collective security; appeasement</li> </ul> <p>Events</p> <ul style="list-style-type: none"> <li>• German challenges to the post-war settlements (1933–1938)</li> <li>• Italian expansion: Abyssinia (1935–1936); Albania; entry into the Second World War</li> <li>• German expansion (1938–1939); Pact of Steel, Nazi–Soviet Pact and the outbreak of war</li> </ul> <p>Responses</p> <ul style="list-style-type: none"> <li>• International response to German aggression (1933–1938)</li> <li>• International response to Italian aggression (1935–1936)</li> <li>• International response to German and Italian aggression (1940)</li> </ul>

## Prescribed subject 4: Rights and protest

This prescribed subject focuses on struggles for rights and freedoms in the mid-20th century. Two case studies are prescribed, from two different regions of the world, and **both** of these case studies must be studied. The first case study explores the civil rights movement in the US between 1954 and the passing of the Voting Rights Act in 1965. The second case study explores protests against apartheid in South Africa. It focuses specifically on the years 1948–1964, beginning with the election of the National Party in 1948 and ending with the imprisonment of Nelson Mandela and his co-defendants following the Rivonia trial in 1964.

Case studies	Material for detailed study
Case study 1: Civil rights movement in the United States (1954–1965)	<p>Nature and characteristics of discrimination</p> <ul style="list-style-type: none"> <li>• Racism and violence against African Americans; the Ku Klux Klan; disenfranchisement</li> <li>• Segregation and education; Brown versus Board of Education decision (1954); Little Rock (1957)</li> <li>• Economic and social discrimination; legacy of the Jim Crow laws; impact on individuals</li> </ul> <p>Protests and action</p> <ul style="list-style-type: none"> <li>• Non-violent protests; Montgomery bus boycott (1955–1956); Freedom Rides (1961); Freedom Summer (1964)</li> <li>• Legislative changes: Civil Rights Act (1964); Voting Rights Act (1965)</li> </ul> <p>The role and significance of key actors/groups</p> <ul style="list-style-type: none"> <li>• Key actors: Martin Luther King Jr; Malcolm X; Lyndon B Johnson</li> <li>• Key groups: National Association for the Advancement of Colored People (NAACP); Southern Christian Leadership Conference (SCLC) and Student Non-violent Coordinating Committee (SNCC); the Nation of Islam (Black Muslims)</li> </ul>
Case study 2: Apartheid South Africa (1948–1964)	<p>Nature and characteristics of discrimination</p> <ul style="list-style-type: none"> <li>• “Petty Apartheid” and “Grand Apartheid” legislation</li> <li>• Division and “classification”; segregation of populations and amenities; creation of townships/forced removals; segregation of education; Bantustan system; impact on individuals</li> </ul> <p>Protests and action</p> <ul style="list-style-type: none"> <li>• Non-violent protests: bus boycotts; defiance campaign, Freedom Charter</li> <li>• Increasing violence: the Sharpeville massacre (1960) and the decision to adopt the armed struggle</li> <li>• Official response: the Rivonia trial (1963–1964) and the imprisonment of the ANC leadership</li> </ul> <p>The role and significance of key actors/groups</p> <ul style="list-style-type: none"> <li>• Key individuals: Nelson Mandela; Albert Luthuli</li> <li>• Key groups: the African National Congress (ANC); the South African Communist Party (SACP) and the MK (Umkhonto we Sizwe—“Spear of the Nation”)</li> </ul>

## Prescribed subject 5: Conflict and intervention

This prescribed subject focuses on conflict and intervention in the late 20th century. Two case studies are prescribed, from two different regions of the world, and **both** of these case studies must be studied. The first case study focuses on the genocide in Rwanda in 1994, beginning with the outbreak of civil war in Rwanda in 1990 and ending with the establishment of the International Criminal Court in 1998. The second case study focuses on events surrounding the war in Kosovo from 1998–1999, beginning with the escalating ethnic tensions in Kosovo from 1989 onwards, through to the elections of 2002.

Case studies	Material for detailed study
Case study 1: Rwanda (1990–1998)	<p>Causes of the conflict</p> <ul style="list-style-type: none"> <li>Ethnic tensions in Rwanda; the creation of the Hutu power movement and the Interahamwe; role of the media</li> <li>Other causes: economic situation; colonial legacy</li> <li>Rwandan Civil War (1990–1993); assassination of Habyarimana and Ntaryamira (1994)</li> </ul> <p>Course and interventions</p> <ul style="list-style-type: none"> <li>Actions of the Rwandan Patriotic Front (RPF) and Rwandan government; role of the media</li> <li>Nature of the genocide and other crimes against humanity; war rape</li> <li>Response of the international community; the United Nations Assistance Mission for Rwanda (UNAMIR); reasons for inaction; role of France, Belgium and the US</li> </ul> <p>Impact</p> <ul style="list-style-type: none"> <li>Social impact; refugee crisis; justice and reconciliation</li> <li>International impact; establishment of the International Criminal Tribunal for Rwanda (1994)</li> <li>Political and economic impact; RPF-led governments; continued warfare in the Democratic Republic of Congo (Zaire)</li> </ul>
Case study 2: Kosovo (1989–2002)	<p>Causes of the conflict</p> <ul style="list-style-type: none"> <li>Ethnic tensions between Serbs and Kosovar Albanians; rising Albanian nationalism</li> <li>Political causes: constitutional reforms (1989–1994); repression of the Albanian independence campaign</li> <li>Role and significance of Slobodan Milosevic and Ibrahim Rugova</li> </ul> <p>Course and interventions</p> <ul style="list-style-type: none"> <li>Actions of Kosovo Liberation Army, Serbian government police and military</li> <li>Ethnic cleansing and crimes against humanity; significance of the Račak massacre</li> <li>Response of the international community; response of the UN; NATO bombing campaign; Kosovo Force (KFOR)</li> </ul> <p>Impact</p> <ul style="list-style-type: none"> <li>Social and economic consequences; refugee crisis; damage to infrastructure</li> <li>Political impact in Kosovo; election of Ibrahim Rugova as president (2002)</li> <li>International reaction and impact; International Criminal Tribunal for the Former Yugoslavia (ICTY); indictment of Milosevic</li> </ul>

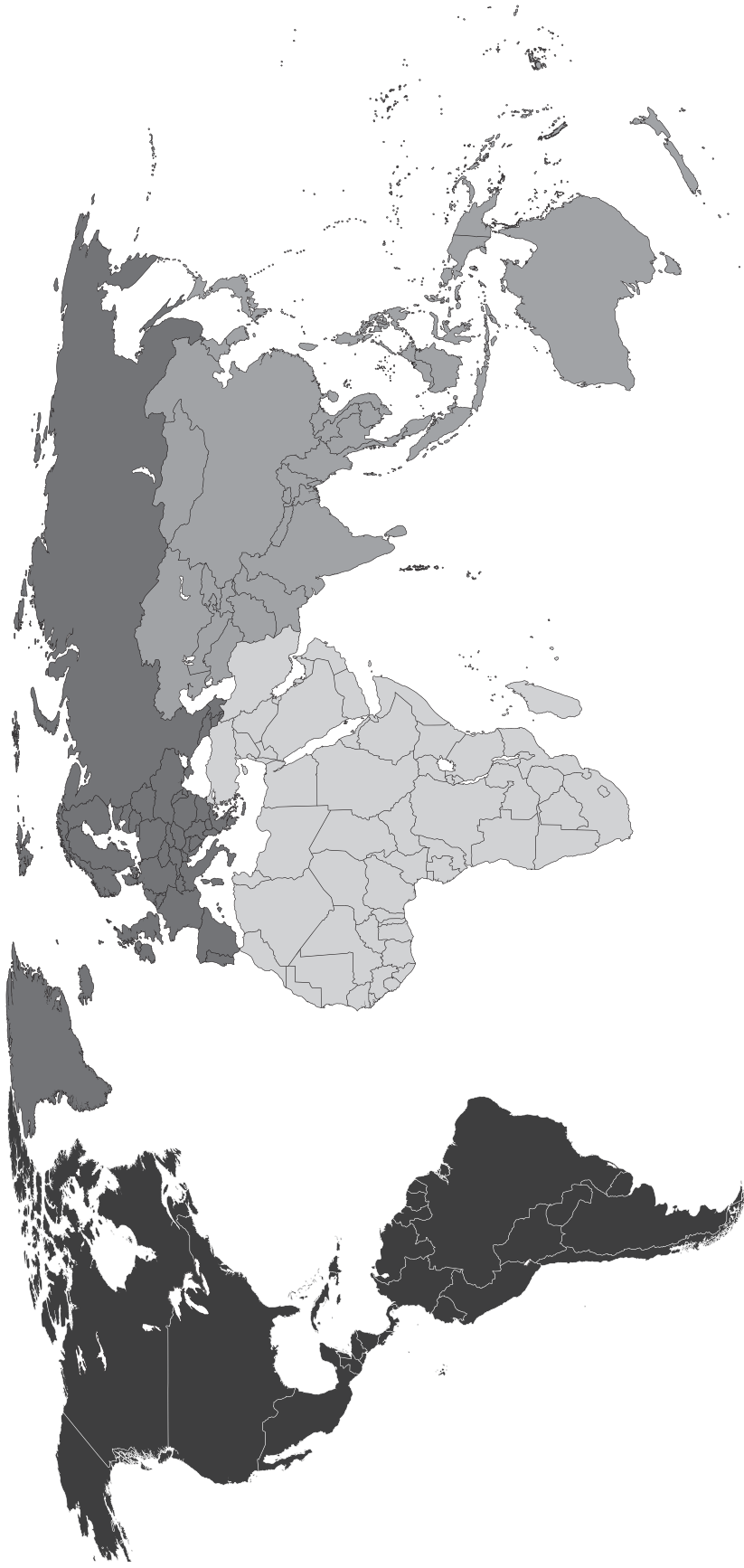


## World history topics

This element of the course explores key topics in world history. Teachers should select **two** topics from the following 12 options.

1. Society and economy (750–1400)
2. Causes and effects of medieval wars (750–1500)
3. Dynasties and rulers (750–1500)
4. Societies in transition (1400–1700)
5. Early Modern states (1450–1789)
6. Causes and effects of Early Modern wars (1500–1750)
7. Origins, development and impact of industrialization (1750–2005)
8. Independence movements (1800–2000)
9. Evolution and development of democratic states (1848–2000)
10. Authoritarian states (20th century)
11. Causes and effects of 20th-century wars
12. The Cold War: Superpower tensions and rivalries (20th century)

The following pages contain tables for each world history topic outlining the topics for study and the prescribed content. Suggested examples are also provided for each topic. It should be noted that for this syllabus component the examples provided are **suggestions only** and should not be taken as prescriptive. Teachers are free to use these examples or to replace them with others that more closely meet the needs and interests of their students. For each topic examples must be studied from more than one region of the world. For the purposes of the DP history course the world has been divided into four regions. They are Asia and Oceania, Africa and the Middle East, Europe, and the Americas.



**Figure 3**  
*Outline map indicating the four regions for DP history*

## World history topic 1: Society and economy (750–1400)

This topic focuses on social and economic change and continuity in the medieval world. It allows the opportunity for students to examine the social and economic impact of dramatic events of the period such as the spread of the Black Death, as well as the contribution of significant individuals such as Marco Polo or Ibn Battuta. The topic focuses on exploring both the causes and the consequences of these social and economic changes, as well as on exploring key cultural and intellectual developments during the period. Some examination questions will require students to compare examples from more than one region of the world.

Topic	Prescribed content
Society and economy	<ul style="list-style-type: none"> <li>• Changes in social structures and systems</li> <li>• Impact of population change; impact of famines and disease</li> <li>• Role of women in society: economic and non-economic roles</li> <li>• Nature and development of trade; changes in economic systems; taxation</li> <li>• Changes in travel and transportation</li> </ul>
Cultural and intellectual developments	<ul style="list-style-type: none"> <li>• Role and significance of key individuals</li> <li>• Factors affecting the transmission of ideas and cultures</li> <li>• Significance and impact of artistic and cultural developments; developments in architecture</li> <li>• Developments in science and technology</li> </ul>
Religion and society	<ul style="list-style-type: none"> <li>• Religious institutions: religious institutions and the economy; influence of religious institutions on society</li> <li>• Religious leaders: role of religious leaders in government and administration; disputes between rulers and religious leaders</li> <li>• Treatment of religious minorities; religious persecution</li> <li>• Spread of religion</li> </ul>

### Suggested examples

Please note that the examples provided here are **suggestions only**. Teachers are free to use examples from this list or any other appropriate examples, depending on the particular needs and interests of the teacher and students.

Africa and the Middle East: spread of Islam in Africa; individuals such as al-Ghazali (1058–1111) and Maimonides (1135 or 1138–1204); high taxation of peasant farmers in Egypt; Ghanaian Empire's taxation of trans-Saharan trade; the effect of the Black Death and other diseases on Mamluk Egypt

The Americas: Mayan decline in the 8th and 9th centuries; Purépecha architecture; movement of Athabaskan speakers into Pueblo Native American territories; Woodland and Mississippian cultures

Asia and Oceania: the spread of Buddhism; cultural developments during the Song dynasty (960–1279); architecture of Angkor Wat; trade along the Silk Road; the rise of the Samurai in Japan

Europe: individuals such as Dante Alighieri (1265–1321); the effect of the Black Death; manorialism in Europe; role of Venice, Genoa and other city states in European economies; transition from Romanesque to Gothic architecture in western Europe

## World history topic 2: Causes and effects of medieval wars (750–1500)

Wars and conflicts, either among or between communities, and military expansion played a crucial role in shaping the medieval world. This topic explores the causes and consequences of conflicts, as well as the practices of warfare in this period. Students will be expected to make reference to specific conflicts in their responses. Some examination questions will require them to make reference to conflicts from two different regions, so examples of dynastic, territorial and religious conflicts from different regions of the world must be studied. Please note that the suggested examples for this topic include “cross-regional” wars such as the Crusades. In examination questions that ask students to discuss examples of wars from different regions, students may use these wars in a regional context (for example, the impact of the Crusades in the Middle East) but may not then use these same wars in a different region (for example, the impact of the Crusades in Europe) in the same response.

Topic	Prescribed content
Types and causes of conflicts	<ul style="list-style-type: none"> <li>• Dynastic, territorial and religious disputes</li> <li>• Economic causes, competition for resources</li> <li>• Ideological and political causes</li> <li>• Religious causes</li> <li>• Long-term, short-term and immediate causes</li> </ul>
Course/practices	<ul style="list-style-type: none"> <li>• Role and significance of leaders</li> <li>• Raising armies: knighthood, military service and mercenaries; taxation</li> <li>• Logistics, tactics and organization of warfare</li> <li>• Women and war</li> </ul>
Effects	<ul style="list-style-type: none"> <li>• Conquest, boundary and dynastic changes</li> <li>• Treaties and truces</li> <li>• Political repercussions</li> <li>• Economic, social, religious and cultural changes</li> <li>• Demographic changes and population movements</li> </ul>

### Suggested examples

Please note that the examples provided here are **suggestions only**. Teachers are free to use examples from this list or any other appropriate examples, depending on the particular needs and interests of the teacher and students.

Examples of wars: Norman conquest of England (1066); England and France at war (1154–1204); The Hundred Years’ War (1337–1453); the Wars of the Roses (1455–1487); the Crusades (1095–1291); Toluid Civil War 1260–1264; Great ‘Abbasid Civil War (809–813); Byzantine–Seljuq Wars (1048–1308); Byzantinian–Bulgarian Wars under Khan Krum (807–814); the Tepanec War with the Aztecs (1428–1430)

Examples of leaders: Nur al-Din (1118–1174); Saladin (1137/1138–1193); Richard I of England (1157–1199); Edward III of England (1312–1377); Louis VII of France (1120–1180); Charles V of France (1338–1380); Genghis Khan (c1162–1227); Kublai Khan (1215–1294); Tamerlane (1336–1405)

### World history topic 3: Dynasties and rulers (750–1500)

This topic focuses on dynasties and kingdoms, and their rulers. It explores the status, power and position of these rulers, and on how they came to govern and sustain their rule. The question of how dynastic states emerged will be a central focus of this topic. What powers did individual rulers hold and lay claim to? How did they govern their states and legitimize their rule? What institutions emerged? Students will be expected to make reference to specific dynasties in their responses, and some examination questions will require them to make reference to dynasties from different regions of the world.

Topic	Prescribed content
Dynasties and rulers	<ul style="list-style-type: none"> <li>Individual rulers: nature of power and rule; aims and achievements</li> <li>Methods used to legitimize, consolidate and maintain rule</li> <li>Expansion of dynasties/kingdoms: reasons for expansion; methods used to expand power; invasion and settlement</li> </ul>
Law, governing institutions and administration	<ul style="list-style-type: none"> <li>Models and methods of government and administration</li> <li>Sources of religious and secular law</li> <li>Administration and interpretation of law</li> <li>Role and duties of officials; role of nobility and the elite</li> </ul>
Challenges	<ul style="list-style-type: none"> <li>Successes and failures of dynasties and rulers</li> <li>Internal and external challenges to power; the success with which these challenges were overcome</li> <li>Rebellion and/or political opposition; rivalries and issues of succession</li> </ul>

#### Suggested examples

Please note that the examples provided here are **suggestions only**. Teachers are free to use examples from this list or any other appropriate examples, depending on the particular needs and interests of the teacher and students.

Examples of dynasties: 'Abbasid Caliphate (750–1258); Fatimid Caliphate (909–1171); Zagwe dynasty (900–1270); Carolingian Empire (800–888); Song dynasty (900–1279); Jin dynasty (1115–1234); Mongol Empire (1206–1368); Almohad dynasty (c1120–1269); Second Bulgarian Empire (1185–1396); dynasty of Kievan Rus (882–1283); Kingdom of Cusco (1197–1438); Trần dynasty of Vietnam (1225–1400); Tulunid dynasty (868–905); Ayyubid dynasty (1171–1341); Comnenian dynasty (1081–1204)

Examples of rulers: Charlemagne (768–814); Tamerlane (1370–1405); Matilda (1141); Louis VI of France (1108–1137); Harun al-Rashid (786–809); 'Abd al-Rahman III of Spain (912–961); Frederick I (Barbarossa) (Holy Roman Emperor 1155–1190); Empress Theodora (1042–1056); Itzcoatl (1427–1440); Hongwu (1368–1398); Basil II (976–1025); Baibars (1260–1277)

## World history topic 4: Societies in transition (1400–1700)

This topic focuses on exploring societal change. It centres on the transition from the medieval to the modern world; a period of dramatic economic, social and cultural change. Students will be expected to make reference to specific examples in their responses, and some examination questions will require students to make reference to examples from two different regions of the world.

Topic	Prescribed content
Social and economic change	<ul style="list-style-type: none"> <li>• Changing social structures and systems; role of women in society</li> <li>• Population expansion and movements</li> <li>• Treatment of minorities</li> <li>• Economic change: development of, and changing patterns of, trade; role and impact of merchants and travellers</li> </ul>
Cultural and intellectual change	<ul style="list-style-type: none"> <li>• Artistic, cultural and intellectual movements</li> <li>• Cross-cultural exchange</li> <li>• Scientific and technological developments; social and cultural impact of those developments</li> <li>• Role and significance of key intellectual/scientific figures</li> </ul>
Religious change	<ul style="list-style-type: none"> <li>• Religion and the state: interactions and relationships; religion as a support or a challenge to the state</li> <li>• Religious expansion and conversion</li> <li>• Religious division, conflict, discrimination and persecution</li> </ul>

### Suggested examples

Please note that the examples provided here are **suggestions only**. Teachers are free to use examples from this list or any other appropriate examples, depending on the particular needs and interests of the teacher and students.

Africa and the Middle East: the impact of trade in salt and gold on the rise and decline of African empires; Christian art and architecture in Ethiopia; Bantu migration; impact of slavery on the economy and society in Africa; spread of Islam in western Africa and the Swahili Coast

Asia and Oceania: Indian Ocean trade; collapse of the Ming dynasty; the Azuchi-Momoyama period in Japan (1568–1600)

The Americas: treatment of indigenous peoples in the Americas; transatlantic trade; impact of slavery on economy and society in the Americas

Europe: the Renaissance; the Enlightenment; Gutenberg printing press (1450); decline of feudalism; the Spanish Inquisition; the Reformation and Catholic Reformation; impact of inventions such as new navigational instruments; impact of scientific pioneers such as Copernicus, Kepler, Newton or Galileo

## World history topic 5: Early Modern states (1450–1789)

This topic focuses on political change in the Early Modern period. It examines the establishment and expansion of colonial empires, as well as the social, economic and cultural impact of this expansion upon the colonial states. Students will be expected to make reference to specific examples in their responses, and some examination questions will require students to make reference to examples from two different regions of the world.

Topic	Prescribed content
Nature of power and rule	<ul style="list-style-type: none"> <li>Established and new states; states in ascendancy and states in decline</li> <li>Methods and models of government; reasons for changes in political structures/political organization; domestic policies; treatment of subjects</li> <li>Individual rulers: ideology; nature of rule; ambition and achievements; legitimacy; successes and failures</li> </ul>
Expansion	<ul style="list-style-type: none"> <li>Expansion of established states; political and economic reasons for expansion</li> <li>Political organization in established states: structures of government and political structure; models and methods of government; relationship between religion and the state</li> <li>Establishment and expansion of colonial empires; political and economic reasons for expansion and acquisition of territory</li> <li>Political organization in colonial states: structures of government and political structure in the colonial world; models and methods of government; relationship between religion and the state</li> </ul>
Conflicts and challenges	<ul style="list-style-type: none"> <li>Methods of maintaining power; treatment of opposition</li> <li>Support and opposition; challenges to power and how successfully those challenges were overcome</li> <li>Challenges to colonial rule: resistance, rebellions and their impact; the colonial race—competition and conflict</li> <li>Rivalries and tensions; issues of succession</li> </ul>

### Suggested examples

Please note that the examples provided here are **suggestions only**. Teachers are free to use examples from this list or any other appropriate examples, depending on the particular needs and interests of the teacher and students.

Africa and the Middle East: expansion of the Ottoman Empire into the Middle East and North Africa; Safavid Persia; Songhai Empire (c1464–1591); the Benin Empire; the Ajuran Sultanate

The Americas: New Spain; British colonies in North America; colonial conflicts between the British and French; the Iroquois confederation; Spanish conquest of the Incan Empire; challenges to Spanish Empire and the Pueblo Revolt of 1680

Asia and Oceania: the Tokugawa Shogunate; early Qing dynasty; Mughal India; the expansion and contraction of the Ayutthaya Kingdom in Thailand

Europe: expansion of the Ottoman Empire into Europe; expansion and reorganization of the Russian Empire under Peter the Great; Kingdom of Granada from 1492; France under Louis XIV

## World history topic 6: Causes and effects of Early Modern wars (1500–1750)

The Early Modern period saw dramatic increases in the size and scope of wars, as well as major changes to the nature of warfare because of developments such as the widespread use of gunpowder. This topic explores the causes and consequences of conflicts, as well as the practices of warfare in this period. Students will be expected to make reference to specific conflicts in their responses. Some examination questions will require students to make reference to examples of conflicts from two different regions. Please note that in examination questions that ask students to discuss examples of wars from different regions, students may use a cross-regional war in a regional context as one of their examples, but may not then use the same war in a different region in the same response.

Topic	Prescribed content
Causes of conflicts	<ul style="list-style-type: none"> <li>• Ideological and political causes</li> <li>• Economic causes; competition for resources</li> <li>• Religious causes</li> <li>• Short- and long-term causes</li> </ul>
Practices and impact on outcome	<ul style="list-style-type: none"> <li>• Role and significance of leaders</li> <li>• Raising armies: military service and mercenaries; taxation</li> <li>• Organization of warfare; strategies: land and/or sea</li> <li>• Significance of technological developments</li> <li>• Influence and/or involvement of foreign powers</li> </ul>
Effects	<ul style="list-style-type: none"> <li>• The successes and/or failures of peacemaking</li> <li>• Economic, political and territorial impact</li> <li>• Social and religious impact</li> <li>• Demographic changes and population movements</li> </ul>

### Suggested examples

Please note that the examples provided here are **suggestions only**. Teachers are free to use examples from this list or any other appropriate examples, depending on the particular needs and interests of the teacher and students.

Africa and the Middle East: Ethiopian–Adal War (1529–1543); Ottoman–Mamluk War (1516–1517); Moroccan invasion of the Songhai Empire (1591)

The Americas: the Acadian Civil War (1640–1645); the “Beaver Wars” (mid-17th century); Spanish conquest of the Aztec and Incan Empires; Pueblo Revolt (1680)

Asia and Oceania: Mughal conquests; Burmese–Siamese War (1547–1549); Japanese invasions of Korea (1592–1598); Qing conquest of Ming China

Europe: Dutch War of Independence (1568–1648); the Thirty Years War (1618–1648); Russo-Swedish War (1554–1557); the Great Northern War (1700–1721); the English Civil War (1642–1651)



## World history topic 7: Origins, development and impact of industrialization (1750–2005)

This topic focuses on the huge social and economic changes associated with industrialization. As industrialization occurred at different times in different countries, the specific time frame focused on within the overall period (1750–2005) will depend on the examples chosen for study. The topic focuses on exploring the origins, development and impact of industrialization. Some examination questions will require students to make reference to examples of industrialization in two countries, each chosen from a different region.

Topic	Prescribed content
The origins of industrialization	<ul style="list-style-type: none"> <li>• The causes and enablers of industrialization; the availability of human and natural resources; political stability; infrastructure</li> <li>• Role and significance of technological developments</li> <li>• Role and significance of individuals</li> </ul>
The impact and significance of key developments	<ul style="list-style-type: none"> <li>• Developments in transportation</li> <li>• Developments in energy and power</li> <li>• Industrial infrastructure; iron and steel</li> <li>• Mass production</li> <li>• Developments in communications</li> </ul>
The social and political impact of industrialization	<ul style="list-style-type: none"> <li>• Urbanization and the growth of cities and factories</li> <li>• Labour conditions; organization of labour</li> <li>• Political representation; opposition to industrialization</li> <li>• Impact on standards of living; disease and life expectancy; leisure; literacy and media</li> </ul>

### Suggested examples

Please note that the examples provided here are **suggestions only**. Teachers are free to use examples from this list or any other appropriate examples, depending on the particular needs and interests of the teacher and students.

#### Examples of countries:

- Africa and the Middle East: Egypt, South Africa
- The Americas: Argentina, US, Canada
- Asia and Oceania: Japan, India, Australia
- Europe: Great Britain, Germany, Russia/USSR

Examples of technological developments: the combustion engine; steam power/the steam engine; gas lighting; generation of electricity; iron production; mechanized cotton spinning; production of sulphuric acid; production of steel and the Bessemer process; nuclear power; growth in information technology

Examples of significant individuals: Thomas Edison; the Wright brothers; Charles Babbage; Andrew Carnegie; Cornelius Vanderbilt; Alexander Graham Bell; Henry Ford; Richard Arkwright; Michael Faraday; James Watt; Jean Lenoir; Tim Berners-Lee

## World history topic 8: Independence movements (1800–2000)

This theme focuses on the emergence of new states in the 19th and 20th centuries. It explores the origins and rise of independence movements, the reasons for their success, the challenges that new states faced in their first 10 years, and the responses to those challenges. Some examination questions will require students to make reference to two movements, each chosen from a different region. In order for students to be able to make meaningful comparisons across all aspects of the prescribed content, it is recommended that a minimum of three independence movements should be studied. Please note that the focus of this topic is specifically on movements seeking independence from a foreign power, so topics such as solidarity in Poland would not be an appropriate example.

Topic	Prescribed content
Origins and rise of independence movements, up to the point of independence	<ul style="list-style-type: none"> <li>• Development of movements: role and relative importance of nationalism and political ideology</li> <li>• Development of movements: role and relative importance of religion, race, social and economic factors</li> <li>• Wars as a cause and/or catalyst for independence movements</li> <li>• Other internal and external factors fostering growth of independence movements</li> </ul>
Methods used and reasons for success	<ul style="list-style-type: none"> <li>• Methods of achieving independence (including violent and non-violent methods)</li> <li>• Role and importance of leaders of independence movements</li> <li>• The role and relative importance of other factors in the success of independence movements</li> </ul>
Challenges faced in the first 10 years, and responses to the challenges	<ul style="list-style-type: none"> <li>• Challenges: political problems; ethnic, racial and separatist movements</li> <li>• Social, cultural and economic challenges</li> <li>• Responses to those challenges, and the effectiveness of those responses</li> </ul>

### Suggested examples

Please note that the examples provided here are **suggestions only**. Teachers are free to use examples from this list or any other appropriate examples, depending on the particular needs and interests of the teacher and students.

Africa and the Middle East: Ben Bella and Algeria; Nkrumah and Ghana; Kenyatta and Kenya; Mugabe and Rhodesia/Zimbabwe

The Americas: José Martí and Cuba; San Martín and the former Viceroyalty of the River Plate; Bolívar and Gran Columbia; Dessalines and Haiti

Asia and Oceania: Nehru, Gandhi and India; Jinnah and Pakistan; Somare and Papua New Guinea; Ho Chi Minh and Vietnam

Europe: Kolokotronis and Greece; Kossuth and the establishment of dual monarchy in Hungary (1867); Collins, de Valera and Ireland

## World history topic 9: Evolution and development of democratic states (1848–2000)

This topic covers the evolution and development of democratic multi-party states in a global context from the mid-19th century through to the end of the 20th century. The topic focuses on exploring the emergence of democratic states, the challenges they faced in maintaining and extending democratic practices (sometimes unsuccessfully), responses to social, economic and political issues, and the extension of constitutional rights. Examination questions for this topic will expect students to make reference to specific democratic states in their responses, and some examination questions will require discussion of states from more than one region of the world. In order for students to be able to make meaningful comparisons across all aspects of the prescribed content, it is recommended that a minimum of three democratic states should be studied.

Topic	Prescribed content
Emergence of democratic states	<ul style="list-style-type: none"> <li>• Conditions that encouraged the demand for democratic reform: aftermath of war and/or political upheaval; political, social and economic factors; external influences</li> <li>• The role and significance of leaders</li> <li>• Development of political parties, constitutions and electoral systems; the significance/impact of those developments</li> </ul>
The development of democratic states	<ul style="list-style-type: none"> <li>• Factors influencing the evolution of democratic states: immigration; ideology; economic forces; foreign influences</li> <li>• Responses to, and impact of, domestic crises</li> <li>• Struggle for equality: suffrage movements; civil protests</li> </ul>
Impact of democracy on society	<ul style="list-style-type: none"> <li>• Social and economic policies and reforms: education; social welfare; policies towards women and minorities; the distribution of wealth</li> <li>• The extent to which citizens benefit from those policies</li> <li>• Cultural impact; freedom of expression in the arts and media</li> </ul>

### Suggested examples

Please note that the examples provided here are **suggestions only**. Teachers are free to use examples from this list or any other appropriate examples, depending on the particular needs and interests of the teacher and students.

Africa and the Middle East: South Africa, Israel, Lebanon, Ghana

The Americas: Argentina, Mexico, Venezuela, Chile

Asia and Oceania: India, Japan, Malaysia, Australia

Europe: Spain, Italy, Germany, Czech Republic, Poland

## World history topic 10: Authoritarian states (20th century)

This topic focuses on exploring the conditions that facilitated the rise of authoritarian states in the 20th century, as well as the methods used by parties and leaders to take and maintain power. The topic explores the emergence, consolidation and maintenance of power, including the impact of the leaders' policies, both domestic and foreign, upon the maintenance of power. Examination questions for this topic will expect students to make reference to specific authoritarian states in their responses, and some examination questions will require discussion of states from more than one region of the world. In order for students to be able to make meaningful comparisons across all aspects of the prescribed content, it is recommended that a minimum of three authoritarian states should be studied.

Topic	Prescribed content
Emergence of authoritarian states	<ul style="list-style-type: none"> <li>• Conditions in which authoritarian states emerged: economic factors; social division; impact of war; weakness of political system</li> <li>• Methods used to establish authoritarian states: persuasion and coercion; the role of leaders; ideology; the use of force; propaganda</li> </ul>
Consolidation and maintenance of power	<ul style="list-style-type: none"> <li>• Use of legal methods; use of force; charismatic leadership; dissemination of propaganda</li> <li>• Nature, extent and treatment of opposition</li> <li>• The impact of the success and/or failure of foreign policy on the maintenance of power</li> </ul>
Aims and results of policies	<ul style="list-style-type: none"> <li>• Aims and impact of domestic economic, political, cultural and social policies</li> <li>• The impact of policies on women and minorities</li> <li>• Authoritarian control and the extent to which it was achieved</li> </ul>

### Suggested examples

Please note that the examples provided here are **suggestions only**. Teachers are free to use examples from this list or any other appropriate examples, depending on the particular needs and interests of the teacher and students.

Africa and the Middle East: Tanzania—Nyerere; Egypt—Nasser; Iraq—Saddam Hussein; Kenya—Kenyatta; Uganda—Amin

The Americas: Argentina—Perón; Cuba—Castro; Chile—Pinochet; Haiti—Duvalier; Nicaragua—Somoza

Asia and Oceania: China—Mao; Indonesia—Sukarno; Pakistan—Zia ul Haq; Cambodia—Pol Pot

Europe: Germany—Hitler; USSR—Stalin; Italy—Mussolini; Spain—Franco; Poland—Pilsudski

## World history topic 11: Causes and effects of 20th century wars

This topic focuses on the causes, practice and effects of war in the 20th century. The topic explores the causes of wars, as well as the way in which warfare was conducted, including types of war, the use of technology, and the impact these factors had upon the outcome. Examination questions for this topic will require students to make reference to specific 20th-century wars in their responses, and some examination questions will require discussion of wars from more than one region of the world. Please note that the suggested examples for this topic include “cross-regional” wars such as the First and Second World Wars. In examination questions that ask students to discuss examples of wars from different regions, students may use these wars in a regional context (for example, the Second World War in the Pacific) but may not then use the same war in a different region (for example, the Second World War in Europe) in the same response.

Topic	Prescribed content
Causes of war	<ul style="list-style-type: none"> <li>Economic, ideological, political, territorial and other causes</li> <li>Short- and long-term causes</li> </ul>
Practices of war and their impact on the outcome	<ul style="list-style-type: none"> <li>Types of war: civil wars; wars between states; guerrilla wars</li> <li>Technological developments; theatres of war—air, land and sea</li> <li>The extent of the mobilization of human and economic resources</li> <li>The influence and/or involvement of foreign powers</li> </ul>
Effects of war	<ul style="list-style-type: none"> <li>The successes and failures of peacemaking</li> <li>Territorial changes</li> <li>Political repercussions</li> <li>Economic, social and demographic impact; changes in the role and status of women</li> </ul>

### Suggested examples

Please note that the examples provided here are **suggestions only**. Teachers are free to use examples from this list or any other appropriate examples, depending on the particular needs and interests of the teacher and students.

Africa and the Middle East: Algerian War (1954–1962); Nigerian Civil War (1967–1970); Iran–Iraq War (1980–1988); North Yemen Civil War (1962–1970); First Gulf War (1990–1991)

The Americas: Chaco War (1932–1935); Falklands/Malvinas War (1982); Mexican Revolution (1910–1920); Contra War (1981–1990)

Asia and Oceania: Chinese Civil War (1927–1937 and/or 1946–1949); Vietnam (1946–1954 and/or 1964–1975); Indo-Pakistan Wars (1947–1949 and/or 1965 and/or 1971)

Europe: Spanish Civil War (1936–1939); the Balkan Wars (1990s); Russian Civil War (1917–1922); Irish War of Independence (1919–1921)

Cross-regional wars: First World War (1914–1918); Second World War (1939–1945); Russo-Japanese War (1904–1905)

## World history topic 12: The Cold War: Superpower tensions and rivalries (20th century)

The Cold War dominated global affairs from the end of the Second World War to the early 1990s. This topic focuses on how superpower rivalries did not remain static but changed according to styles of leadership, strength of ideological beliefs, economic factors and crises involving client states. The topic aims to promote an international perspective on the Cold War by requiring the study of Cold War leaders, countries and crises from more than one region of the world.

Topic	Prescribed content
Rivalry, mistrust and accord	<ul style="list-style-type: none"> <li>The breakdown of the grand alliance and the emergence of superpower rivalry in Europe and Asia (1943–1949): role of ideology; fear and aggression; economic interests; a comparison of the roles of the US and the USSR</li> <li>The US, USSR and China—superpower relations (1947–1979): containment; peaceful co-existence; Sino-Soviet and Sino-US relations; detente</li> <li>Confrontation and reconciliation; reasons for the end of the Cold War (1980–1991): ideological challenges and dissent; economic problems; arms race</li> </ul>
Leaders and nations	<ul style="list-style-type: none"> <li>The impact of two leaders, each chosen from a different region, on the course and development of the Cold War</li> <li>The impact of Cold War tensions on two countries (excluding the USSR and the US)</li> </ul>
Cold War crises	<ul style="list-style-type: none"> <li>Cold War crises case studies: detailed study of any two Cold War crises from different regions: examination and comparison of the causes, impact and significance of the two crises</li> </ul>

### Suggested examples

Please note that the examples provided here are **suggestions only**. Teachers are free to use examples from this list or any other appropriate examples, depending on the particular needs and interests of the teacher and students.

#### Examples of leaders

Truman, Stalin, Khrushchev, Nixon, Mao, Castro, Brezhnev, Reagan, Gorbachev, Nasser, Brandt

#### Examples of Cold War crises

Africa and the Middle East: Suez Crisis (1956); Congo (1960–1961); outbreak of Angolan Civil War (1975)

The Americas: Cuban Missile Crisis (1962); US intervention in Chile (1973); Contra War (1981–1990)

Asia and Oceania: Chinese Offshore Island Crises (1954/1958); North Korean invasion of South Korea (1950); Soviet invasion of Afghanistan (1979)

Europe: Berlin blockade (1948–1949), Berlin Wall (1958–1961); Hungary (1956); the Prague spring (1968); the USSR and eastern Europe (1981–1989)

## HL options

The HL options provide an opportunity for in-depth study of the history of a particular region. Teachers should select **one** of the following four HL regional options.

- History of Africa and the Middle East
- History of the Americas
- History of Asia and Oceania
- History of Europe

For whichever region is selected, **three** sections must be studied from a choice of 18 sections for each region.

## HL option 1: History of Africa and the Middle East

**Three** sections must be selected for study. Only people and events named in the guide will be named in examination questions.



**Figure 4**  
*Africa and the Middle East map*



### 1: The 'Abbasid dynasty (750–1258)

The fall of the Umayyad dynasty in 749 is significant for the shift of the centre of the Islamic world from Damascus to Baghdad, and the establishment of a flourishing civilization that was officially destroyed only in the middle of the 13th century. This section explores the first century of the 'Abbasid period, when the system was still effective and centralized, through the centuries where Baghdad was at the centre of the Golden Age of Islam, through to the siege of Baghdad by the Mongols in 1258.

- The fall of the Umayyads and the 'Abbasid Revolution; reasons for 'Abbasid defeat of the Umayyads, including the role of 'Abbasid military power; the consequences of the revolution; the shift of power from Syria to Iraq
- Political, social and economic aspects of the first century of 'Abbasid rule
- Religious aspects of 'Abbasid rule, the role of the Ulama
- The impact of other civilizations on the 'Abbasids; the Sassanian heritage
- Case studies: al-Mansur; Harun al-Rashid; al-Ma'mun
- Science, culture, philosophy and invention during the Golden Age of Islam
- Decline of the empire; breakdown of 'Abbasid authority; rifts and divisions; Mongol invasion

### 2: The Fatimids (909–1171)

This section focuses on the Ismaili branch of Shiism, which has its own distinct ideology. After their revolutionary rise to power in North Africa in 909, the Fatimids conquered Egypt and established an alternative Muslim capital in Cairo from 969. They exerted considerable influence in the Muslim world as the 'Abbasid Empire fragmented, while also being a catalyst for economic and commercial development in the broader Mediterranean and Red Sea areas.

- Foundation of the dynasty; political, economic and social factors
- Conquest of Egypt and the foundation of Cairo; reasons for, and impact of, the conquest
- Fatimid claims to the caliphate: the 'Abbasids and Umayyads of Spain
- Fatimid ideology and its historical impact; religious relations (Muslims, Coptic Christians, Jews)
- Economic developments including trade within the Fatimid realm of influence
- Height of the Fatimid Empire; government institutions; institutions of learning (Dar al-'Ilm)
- Decline of the Fatimids: internal dissolution; external challenges
- Case studies of **two** of the following: al-Mu'izz (953–975); al-Hakim (996–1021); al-Mustansir (1036–1094)

### 3: The Crusades (1095–1291)

This section deals with the crusading movement, and reaction to it, from the Islamic world between the calling of the First Crusade and the collapse of the crusader states. The leadership, tactics and strategies of both sides should be examined in order to explain both the outcome of the crusading period as well as its impact on the western and Islamic worlds.

- Origins of, and motives for, the Crusades: religious and secular; the holy places; pilgrimage and preaching; theory and practice of jihad
- The First Crusade (1096–1099); the Second Crusade (1145–1149), Third Crusade (1189–1192) and Fourth Crusade (1202–1204): causes; extent of success; consequences
- Foundation of the crusader states: Jerusalem, Antioch, Edessa and Tripoli
- Role and significance of key individuals: Godfrey de Bouillon, Richard I of England, Nur al-Din, Salah al-Din (Saladin) and Baibars

- Military aspects of the Crusades: tactics, major battles and weapons; Templars, Hospitallers, Assassins
- Reasons for successes and failures of both sides throughout the period of the Crusades
- Impact and importance of the Crusades in the Middle East and in the Byzantine Empire

#### **4: The Ottomans (1281–1566)**

This section explores the conquest of Constantinople by the Ottomans, which represents a turning point in both western and Islamic history. The Ottoman conquests of parts of the Islamic world, and their expansion into the Balkans, are key topics for study. The study of Ottoman leaders is important for an understanding of the evolution of Muslim government, administration and law.

- Rise of the Ottomans: Anatolia and the Balkans
- Effects of the foundation of the Ottoman Empire on Europe and Muslim lands
- Rise of the Safavids and contest with the Ottomans
- Ottoman expansion: reasons for; the conquests of Egypt and Syria; fall of the Mamluks—impact and significance
- Military and administrative nature of the Ottoman Empire; changes to the Islamic world; Ottoman contribution to Islamic culture
- Ottoman invasion and capture of Byzantium; reasons for, and consequences of, the fall of Constantinople (1453); its effect on transforming the Ottoman state
- Case studies of **two** of the following: Mehmet II (1451–1481); Selim I (1512–1520); Suleiman the Magnificent (1520–1566)

#### **5: Trade and the rise and decline of African states and empires (800–1600)**

This section focuses specifically on the importance of trade in the rise and decline of African states and empires between 800 and 1600. It explores the importance of commodities and exchange in trade, and the ways in which wealth generated by trade facilitated the emergence of new states and empires in Africa. It also examines the ways in which trade acted as a vehicle for the exchange of ideas, religion and culture.

- Types of trade: trans-Saharan trade in gold and salt—importance of different routes and control over these; impact of trade on the rise and decline of empires; Indian Ocean trade in slaves, ivory, spices and textiles
- Impact of trade on the spread of religion and culture: the Islamization of East and West Africa; influence of Catholicism in the Kingdom of the Kongo
- Ghana Empire (c830–1235): causes of the rise and decline of the Ghana Empire; system of government; social and economic organization; importance of trade; the Almoravid jihad
- Mali Empire (c1230–1600): causes of the rise and decline of the Mali Empire; social, economic and administrative reforms; military organization; importance of Islam; trade
- Rise and expansion of the Kingdom of the Kongo to 1600: political, social and economic organization
- Swahili city states: importance of the Indian Ocean trade in the rise and growth of the city states; emergence of a cosmopolitan Swahili culture

#### **6: Pre-colonial African states (1800–1900)**

This section focuses on the factors influencing the rise of states/kingdoms in Africa in the pre-colonial period. It explores the effects of the emergence of these states/kingdoms in their respective regions as well as the importance of the role of leaders and their responses to the intrusions of outsiders. It examines the role of social, political and economic organization in state building and expansion.

As well as the named states/kingdoms, candidates are required to examine **two** case studies of their choice from the options listed.

- Rise of the Zulu under Shaka; the Mfecane/Difaqane—social, political and economic causes and effects; rise of the Sotho under Moshoeshoe
- Rise of the Sokoto Caliphate under Usman Dan Fodio, and its effects
- Rise of the Niger Delta trading states: Nana and Jaja
- Ethiopian unification and expansion under Tewodros II, Yohannes IV, Menelik II
- Rise of the Mahdist state in Sudan
- Case studies of the rise of **two** of the following: the Mandinka Empire under Samori Toure; the Lozi kingdom under Lewanika; the Ndebele kingdom under Mziklikazi and Lobengula; the Asante empire under Osei Tutu; the Unyamwezi under Mirambo; the Hehe state under Mkwawa

### **7: The slave trade in Africa and the Middle East (1500–1900)**

This section focuses on slavery in Africa and the Middle East during the 16th to 19th centuries. It examines the East African and Atlantic slave trades during this period, as well as examining the decline of, and impact of movements for the abolition of, the slave trade.

- Reasons for the expansion of the Atlantic slave trade from the 16th century: technological factors and the growth of maritime commerce; impact on the slave trade of plantation agriculture; existing practice of slavery in African societies; rivalries and warfare between African states
- Reasons for the expansion of the East African slave trade from the late 18th century: existing slave trade between Arabia and the Swahili coast; expansion of the Sultanate of Oman into East Africa; rising international demand resulting from the ban on the Atlantic trade
- Nature of the slave trade: its social and economic impact in Africa and the Middle East; role and significance of individuals
- Causes of the decline of the Atlantic slave trade: industrialization and economic changes; role of the abolitionist movement; rise of legitimate commerce
- Causes of the decline of the East African slave trade: humanitarian factors and the influence of missionaries; colonial expansion and the closing of the markets; decline of slavery in the Ottoman Empire
- Impact and significance of anti-slavery Acts in the 19th century; including 1807 Slave Trade Act, 1833 Abolition of Slavery Act, 1885 Berlin Act

### **8: European imperialism and the partition of Africa (1850–1900)**

This section deals with the reasons for the growth of European interest in Africa in the 19th century, beginning with the activities of traders, explorers and missionaries. It examines both the European and the African background to partition, and analyses how the military and political weakness of African states facilitated the European annexation of Africa. It also assesses the relative importance of economic and political factors in European imperialism in Africa.

- Growth of European activity in Africa: opportunities presented by the decline of the Ottoman Empire; traders, missionaries and explorers; creeping colonization
- Economic causes of partition: economic weaknesses in Europe; raw materials; search for new markets; role of chartered companies
- Strategic causes of the partition: the sea route to the east; British actions in Egypt and South Africa, and the responses of other European powers
- Other causes: national rivalry; humanitarian factors

- African background to partition: military, technological and administrative weaknesses; political and cultural disunity; collaboration
- German annexation: factors facilitating the annexation; the Berlin West Africa Conference and its impact
- Activities of King Leopold II of Belgium and De Brazza in the Congo region

### **9: Response to European imperialism (1870–1920)**

This section focuses on the responses of communities and states to challenges to their independence. Students are expected to study in depth a variety of responses, and compare and contrast the reasons for, and results of, resistance and collaboration in a very diverse region in which economic, political, social and religious factors made varying contributions to the nature of the responses.

- Factors influencing decisions to resist: determination to preserve independence; brutality and inflexibility of the colonizing power; political structures; military strength; access to firearms
- Ethiopian resistance under Menelik II: reasons for success
- Mandinka resistance to French rule: reasons for success and failure
- Herero and Nama resistance in Namibia: reasons for failure
- Cetshwayo and the conquest and destruction of the Zulu kingdom
- The Asante Wars (1873, 1896, 1900): reasons for Asante resistance and British intervention
- Factors influencing decisions to collaborate: pragmatism; willingness of the colonial power to negotiate; social, political and economic gains including protection; lack of alternative
- Collaboration: Lewanika and Khama with the British
- Resistance and collaboration in Buganda: Kabaka Mwanga and Apolo Kagwa, reasons for failure and success

### **10: Africa under colonialism (1890–1980)**

This section focuses on the establishment of colonial administrative systems in East, Central and West Africa between 1890 and the establishment of independence. It requires an in-depth comparative study of British, French, German and Portuguese systems of administration, their impact, and the economic and social developments during the colonial period. Students should study how political developments were affected by the presence of colonial settlers in Kenya, Angola, Mozambique and Southern Rhodesia.

- British rule in Kenya: colonial administration; economic and social development to 1963
- Tanganyika under German and British rule to 1961
- Nyasaland, Northern Rhodesia and Southern Rhodesia under British rule: economic and social development to 1965; the creation and collapse of the Central African Federation; Ian Smith and the Unilateral Declaration of Independence
- Angola/Mozambique under Portuguese rule: economic and social development to 1975
- Nigeria: direct and indirect rule; factors that promoted the choice of administrative system in Nigeria; economic and social development; regional rivalries; constitutional developments to 1960
- Gold Coast: colonial administration; economic, social and political development to 1957
- Senegal: colonial administration; economic, social and political development to 1960

### 11: 20th-century nationalist and independence movements in Africa

This section focuses on efforts at decolonization in Africa, focusing specifically on later attempts to regain political freedom. The section is based on the study of the six case studies specified in the bullet points below. It requires a comparative analysis of the factors that led some countries to achieve independence earlier or later than others, and of the relative contributions of internal and external factors, the role of nationalist movements, political parties, leaders and leadership, and the response of colonial powers. Students should have an in-depth knowledge of the reasons why independence was sometimes achieved through peaceful negotiations and sometimes through armed struggle.

- Angola: liberation war; Popular Movement for the Liberation of Angola (MPLA) and National Union for the Total Independence of Angola (UNITA) to independence in 1975
- South-West Africa: South West Africa People's Organization (SWAPO) to independence for Namibia in 1990
- Kenya: trade unions; Mau Mau; Jomo Kenyatta and Kenya African National Union (KANU) to 1963
- Gold Coast to Ghana: Nkrumah and the Convention People's Party (CPP) to independence in 1957
- French West Africa: nationalism, political parties and independence in Senegal in 1960
- Tanganyika: Tanganyika African National Union; Julius Nyerere to 1961

### 12: The Ottoman Empire (c1800–1923)

This section focuses on the decline and collapse of Ottoman power. It examines developments in the Ottoman Empire, both internally and externally, and also how the condition of the declining empire meant that there was great interest in the region and a demand for change within Turkish and Ottoman lands. This section also explores the extent to which the Ottoman Empire changed over the course of the 19th and early 20th centuries.

- Challenges to Ottoman power in the early 19th century: Greek War of Independence; Muhammad Ali in Egypt
- The Eastern Question: European challenges and Ottoman responses; Crimean War; causes and outcomes of 19th-century crises in the Balkans
- Decline of Ottoman power in the Middle East and North Africa: Egypt, Libya, Algeria; Lebanon
- Attempts at internal reform and modernizations: causes, aims and effects of Tanzimat reforms; Abdul Hamid—reaction and reform
- Growth of the Committee of Union and Progress to 1908–1909; reforms of the Young Turks; Balkan Wars (1912 and 1913)
- Ottoman Empire in the First World War: reasons for entry; impact of war; rise of Atatürk and collapse of empire

### 13: War and change in the Middle East and North Africa 1914–1945

This section focuses on the impact of the First World War in the Middle East and North Africa, including consideration of the post-war territorial and political settlements in the region. The question of the Palestine mandate—including British administration and policies, and the origins and development of the Arab–Jewish dispute up to 1945—is a particular area of focus.

- Allied diplomacy in the Middle East: McMahon–Hussein correspondence; Sykes–Picot; Arab Revolt; Balfour Declaration
- Effects of Paris peace treaties: territorial and political impact; mandate system; British and French administration in Iraq, Transjordan, Syria and Lebanon

- Egypt after the First World War: nationalism; emergence of Wafd Party; Declaration of Independence; British influence
- Palestine mandate: economic, social and political developments; impact of Jewish immigration and settlement; British responses and policies
- Atatürk and the Turkish Republic: aims and policies; impact on Turkish society; successes and failures
- Case study on Iran, Saudi Arabia or a North African state: economic, political and social developments; western influences; attempts at modernization

#### **14: Africa, international organizations and the international community (20th century)**

This section focuses on how Africa was affected by, and itself impacted on, international organizations in the 20th century. These include the League of Nations, the United Nations (UN) and its specialized agencies, and regional organizations such as the East African Community. The Abyssinian Crisis was a major blow to the League of Nations, while the United Nations made a notable contribution to the stabilization of Mozambique. Africa did not escape the impact of the global conflict of the Cold War; some countries remained neutral, while others sided with the United States or the Soviet Union, and this had significant consequences for those countries.

- League of Nations: Abyssinian Crisis (1934–1936); causes and consequences of the failure of the League of Nations to deal with Italian aggression
- Organization of African Unity (OAU) and African Union (AU): objectives, structure, successes and failures
- Regional organizations: East African Community (EAC) (1967–1977); Economic Community of West African States (ECOWAS); Southern African Development Coordination Conference (SADCC)/Southern African Development Community (SADC); successes and failures
- Africa and the UN: Congo, Mozambique, Somalia and Rwanda: reasons for successes and failures; wider impact
- UN specialized agencies: a case study of the impact of any **two** agencies
- The Cold War and its impact on Africa: a case study of the impact on any **two** African countries

#### **15: Developments in South Africa 1880–1994**

This section focuses on South Africa between 1880 and 1994. It examines the political, economic and social consequences of the discovery of minerals and the struggle by the Boers to regain political power. It also examines the causes of the South African War (1899–1902) and the short-term and long-term results, including the establishment of the Union government. It requires an in-depth study of the changing nature of policies towards the African majority from the segregation of Smuts and Hertzog to the apartheid policies developed by Malan and Verwoerd.

- Discovery of diamonds and gold: political, social and economic consequences
- South African War (1899–1902): causes—economic, political, strategic; course and consequences; the Treaty of Vereeniging and developments leading to the Act of Union (1909)
- Policies of Smuts and Hertzog (1910–1948); segregation, discrimination and protest
- National Party: reasons for the election victory of 1948; nature and impact of apartheid policies of Malan; Verwoerd and Grand Apartheid: the Bantustan system
- Resistance to apartheid: radicalization of resistance; the African National Congress (ANC); Sharpeville and the decision to adopt armed struggle; Steve Biko and the Black Consciousness movement; Soweto massacre; township unrest in the 1980s

- International opposition to apartheid: the impact of the economic boycott
- The end of the apartheid system: De Klerk's lifting of the ban on the ANC; release of Mandela and his role in the transition to democracy; the Convention for a Democratic South Africa (CODESA); the 1994 elections

### **16: Social and cultural developments in Africa in the 19th and 20th centuries**

This section focuses on social and cultural developments in Africa in the 19th and 20th centuries. It explores the impact of colonialism on African society, particularly for education, art and culture, as well as for the status of women in society. This section also explores the spread of Christianity and Islam in Africa and the emergence of the African Independent Churches. The final six bullet points should be covered by a case-study approach using any **two** African countries.

- Factors promoting and inhibiting the spread of Islam and Christianity in Africa in the 19th and 20th centuries
- The African Independent Churches movement; reasons for the creation and growth of Africanist churches
- Changing social and cultural values
- Changing role of women
- Social and cultural impact of technological developments
- Impact of immigration and emigration
- Developments in the arts: the impact of colonialism on art and culture
- Developments in education

### **17: Post-war developments in the Middle East (1945–2000)**

This section deals with the issues of nationalism, communalism, modernization and westernization in the Middle East after 1945. It requires examination of the issues of domestic reforms and the extent to which they proved acceptable and/or successful in achieving their aims, as well as consideration of the influence of outside interference on developments within the region generally or in specific states. Relationships between Arab states and the relationship of Arab states (individually and/or collectively) with Israel following the war of 1973 should also be investigated.

- Origins of the state of Israel: post-war tensions and instability in the mandate; causes and effects of the 1948–1949 War
- Arab–Israeli conflicts: Suez Crisis, Six Day War, 1973 War; effects of conflicts—occupied territories, intifadas, Palestine Liberation Organization (PLO); attempts at peacemaking up to, and including, Camp David (2000)
- Post-war Egypt: Nasser, Sadat, Mubarak—political developments; economic and social policies; Pan-Arabism and the United Arab Republic (UAR)
- Post-war Iran: modernization and westernization under Mohammad Reza Shah Pahlavi; western influence; White Revolution; origins and effects of the 1979 Revolution; post-revolution Iran and effects of the Iran–Iraq War
- Lebanon: civil wars; outside interference and reconstruction; Confessional state; economic, religious and social tensions; growth of militias and the PLO

### **18: Post-independence politics in Africa to 2005**

This section deals with the new challenges and new problems that came with independence in Africa. It provides an opportunity to explore the ways, and reasons why, the countries of the region attempted to solve their problems of disease, illiteracy, poverty and economic development. It explores the reasons for, and the impact of, ethnic conflict, civil war and military intervention in African politics. All six bullet points should be covered by a case-study approach using any **two** African countries.

- Causes of ethnic conflict, civil war and military intervention: including ethnic tensions, economic problems, destabilization by outside forces, inefficiency of civilian governments, ideology, and personal ambition
- Impact of ethnic conflict, civil war and military intervention; impact of military rule
- Social and economic challenges: disease, illiteracy, poverty, famine; neo-colonial economic exploitation
- Establishment of single-party states; reasons for establishment, including personal ambition, failure of democracy, and need for effective government
- Return to multi-party democracy in the 1980s and 1990s: reasons for successes and failures
- Economic growth and development to 2005: reasons for growth, including political stability and multi-partyism; leadership; infrastructural development; investment; economic reforms



## HL option 2: History of the Americas

Three sections must be selected for study. Only people and events named in the guide will be named in examination questions.



Figure 5  
*Americas map*

### **1: Indigenous societies and cultures in the Americas (c750–1500)**

This section focuses on indigenous societies and cultures in pre-Columbian Americas, with an emphasis on the political, economic, social and cultural aspects of these societies. The indigenous peoples of the Americas adopted different forms of organization in the north and the south. For the last three bullets of this section, a case-study approach should be used, based on any **two** indigenous societies. This section allows for both specific knowledge of indigenous peoples, and a comparison of their cultures and development.

- Types of political organization: non-sedentary, semi-sedentary, confederations and empires; the role of local and state authorities
- The role of warfare in maintaining and expanding political organization
- Economic and social structures: role and nature of the tribute; landholding; agricultural production; systems of exchange; nature of the tribute in societies without money
- Religion: polytheistic beliefs; relationship between religious and political powers; relationship between man and nature
- Culture: written and unwritten language; contributions to scientific development and the arts

### **2: European explorations and conquests in the Americas (c1492–c1600)**

This section focuses on Spanish, Portuguese, French and British exploration and conquest in the Americas. It examines European exploration and conquest in Latin America, focusing particularly on Spanish and Portuguese contact with indigenous societies, as well as French and British exploration and occupation in North America. The emphasis of this section is on contact, interaction and consequences of exploration and conquest for the indigenous populations.

- Exploration and conquest in North America: Columbus; conquest of the Caribbean; French and British exploration and occupation in North America
- Exploration and conquest in Latin America: Cortés and the conquest of the Aztecs; reasons for Spanish success and Aztec defeat; Pizarro and the conquest of the Incas; later defeat of Manco Inca; reasons for Spanish success and Inca defeat
- Economic impact of exploration and conquest: exploitation of resources; acquisition of gold and silver; fur trade; tobacco trade; the “Columbian Exchange”
- Treatment of indigenous populations; Law of Burgos (1512), New Laws of the Indies (1542); assimilation; eradication; social stratification; use of indigenous labour; women; multiracial issues
- European rivalries; Treaty of Tordesillas (1494); conflicting land claims based upon exploration; impact of conflicting claims

### **3: Colonial government in the New World (1500–1800)**

This section focuses on the challenges and problems of colonial governments in the 16th, 17th and 18th centuries in the New World. It also looks at government attempts to resolve these problems, and the resistance they encountered. Political and economic structures of the colonial governments are also examined. This structure allows for a comparative approach.

- Political organization in Spanish and Portuguese America: viceroyalty system, captaincy system; Habsburg and early Bourbon rule; the Braganza rule
- Political organization in British and French North America: corporate, royal and proprietary; charters
- Colonial American economies; *encomienda*, *yanacónaje* and Mita; plantations; organization of trade; mercantilism; role of gold, silver and sugar
- Bourbon reforms and Pombaline reforms: reasons, nature and impact

- Limits of state power and resistance to authority
- Anglo-French rivalry in North America to 1763; Anglo-French relationships and alliances with indigenous peoples; French and Indian Wars

#### **4: Religion in the New World (1500–1800)**

This section focuses on the role of religion in the New World. It explores the development and influence of the Catholic church in Spanish and Portuguese America through the 16th, 17th and 18th centuries, including the role of religious orders. For the British North-American colonies, this section examines how religion influenced the development through the 17th and 18th centuries. This section also discusses the role of the church and religious orders in New France. This structure allows for a comparative study of the role of religion in the various jurisdictions of colonial America.

- The aims of the Catholic church in Spanish and Portuguese America; its influence; resistance of indigenous populations to Christianization
- Jesuits, Franciscans and Dominicans in Spanish and Portuguese America: economic and political organization; relations with indigenous populations; challenges to government authority
- Indigenous religions and Christianity; syncretism
- Religious tolerance and intolerance in British North America: Puritans, Quakers, Anglicans and Catholics
- The Great Awakening c1720–c1760; social and political impact
- Religion in New France: Black Robes, Jesuits and Recollects

#### **5: Slavery and the New World (1500–1800)**

This section focuses on slavery in the New World. It explores the origins of slavery in the Americas and the role of the colonial powers in the Atlantic slave trade. It explores the Middle Passage, slave resistance and opposition to the slave trade in British North America, led by the Quakers. This study of slavery allows for a comparative approach across the Americas.

- Reasons for, and origins of, slavery
- Role of the colonial powers in the establishment and expansion of slavery; *asiento* system
- Economic and social impact of slavery
- Living and working conditions: the Middle Passage; social structures on plantations in the West Indies, Brazil and the southern colonies
- Slave resistance and slave rebellions
- Opposition to the slave trade and slavery: Quakers and other early abolitionists

#### **6: Independence movements (1763–1830)**

This section focuses on the various forces that contributed to the rise of the independence movements, the similar and different paths that the movements followed, and the immediate effects of independence in the region. It explores the political, intellectual and military contributions of their leaders, and the sometimes contradictory views that shaped the emergence of the new nations.

- Independence movements in the Americas: political, economic, social and religious causes; the influence of Enlightenment ideas; the role of foreign intervention; conflicts and issues leading to war
- Political, intellectual and military contributions of leaders to the process of independence: Washington, Bolivar and San Martin
- United States: processes leading to the Declaration of Independence; influence of ideas; nature of the declaration; military campaigns/battles and their impact on the outcome

- Latin America: characteristics of the independence processes; reasons for the similarities and differences in **two** Latin American countries; military campaigns/battles and their impact on the outcome
- Attitude of the United States towards Latin American independence; nature of, and reasons for, the Monroe Doctrine
- Impact of independence on the economies and societies of the Americas: economic cost of the wars of independence; the establishment of new trade relations; impact on different social groups—specifically indigenous peoples, African Americans, Creoles

### **7: Nation-building and challenges (c1780–c1870)**

This section focuses on the challenges and problems that came with independence. It explores the ways in which, and the reasons why, the countries of the region attempted to build their nations. Independent and new nations emerged; the colonial empires, with few exceptions, were gone; New World links were forged yet the colonial legacy remained. The task of building new nations opened the doors to novel ways of political and economic thinking and to the redefining of concepts such as nation and state.

- United States: Articles of Confederation; the 1787 Constitution: philosophical underpinnings; major compromises and changes in the US political system
- Latin America: challenges to the establishment of political systems; the nature of *caudillo* rule, and regional conditions leading to its establishment; the policies and impact of *caudillo* rule in **one** country
- War of 1812: causes and impact on British North America and the United States
- Mexican–American War (1846–1848): causes and effects on the region
- Canada: causes and effects of 1837 rebellions; the Durham report and its implications; challenges to the Confederation; the British North America Act of 1867—compromises, unresolved issues, regionalism, effects

### **8: United States' Civil War: Causes, course and effects (1840–1877)**

This section focuses on the United States' Civil War between the North and the South (1861–1865), which is often perceived as the great watershed in the history of the United States. It transformed the country forever, but the war created a new set of problems: how would the country be reunited? How would the South rebuild its society and economy? How would the four million freed former slaves fit into society?

- Slavery: cotton economy and slavery; conditions of enslavement; adaptation and resistance; abolitionist debate—ideological, legal, religious and economic arguments for and against slavery, and their impact
- Origins of the Civil War: the Nullification Crisis; states' rights; sectionalism; slavery; political issues; economic differences between the North and South
- Reasons for, and effects of, westward expansion and the sectional debates; the crises of the 1850s; compromise of 1850; political developments, including the Lincoln–Douglas debates and the presidential election of 1860
- Union versus Confederate: strengths and weaknesses; economic resources; role and significance of leaders during the Civil War; role of Lincoln; significant military battles/campaigns
- Factors affecting the outcome of the Civil War; the role of foreign relations; the Emancipation Proclamation (1863) and participation of African Americans in the Civil War
- Reconstruction: presidential and congressional plans; methods of southern resistance; economic, social and political successes and failures
- African Americans in the New South: legal issues; the black codes; Jim Crow laws

### 9: The development of modern nations (1865–1929)

This section, covering the period between the late 19th century and the early 20th century, saw forces that transformed the countries of the region. These forces are generally seen as part of “modernization”, a process that involved the progressive transformation of the economic, political and social structures of the countries of the region. With respect to the first four bullets, a case-study approach should be adopted, using **two** countries from the region as examples.

- Causes and consequences of railroad construction; industrial growth, urbanization and economic modernization; the development of international and inter-American trade; neocolonialism and dependency
- Causes and consequences of immigration; emigration and internal migration, including the impact upon, and experience of, indigenous peoples
- Development and impact of ideological trends, including progressivism, Manifest Destiny, liberalism, nationalism, positivism, social Darwinism, “indigenismo” and nativism
- Social and cultural changes: developments in the arts; changes in the role of women
- Influence of leaders in the transition to the modern era: political and economic aims; the successes and failures of Theodore Roosevelt, Wilfrid Laurier and any **one** Latin American leader
- Social, economic and legal conditions of African Americans between 1865 and 1929; Plessy versus Ferguson, the Great Migration and the Harlem Renaissance; the search for civil rights and the ideas, aims and tactics of Booker T Washington, WEB Du Bois and Marcus Garvey

### 10: Emergence of the Americas in global affairs (1880–1929)

This section focuses on the impact of modernization in the region on foreign policy, including an exploration of the involvement of the region in the First World War. Modernization shaped the new nations, and its effects created the basis for a major shift in the foreign policies of the region. By the end of the 19th century, for example, the United States played a more active role in world affairs and in the affairs of Latin America in particular, thus transforming inter-American relations. When the First World War ended, its impact was felt in the economic, social and foreign policies of the participating countries.

- United States’ expansionist foreign policies: political, economic, social and ideological reasons
- Spanish–American War (1898): causes and effects
- Impact of United States’ foreign policies: the Big Stick; Dollar Diplomacy; moral diplomacy
- United States and the First World War: from neutrality to involvement; reasons for US entry into the First World War; Wilson’s peace ideals and the struggle for ratification of the Treaty of Versailles in the United States; significance of the war for the United States’ hemispheric status
- Involvement of either Canada or **one** Latin American country in the First World War: nature of, and reasons for, involvement
- Impact of the First World War on any **two** countries of the Americas: economic, political, social and foreign policies

### 11: The Mexican Revolution (1884–1940)

This section focuses on the causes, course and impact of the Mexican Revolution in a country that had experienced a lengthy period of political stability and economic growth, but enormous social inequality. The socio-economic composition of revolutionary leadership was varied—as were the aims—and the revolution was prolonged and costly. The 1917 Constitution has been described as the most progressive constitution created at this time, and it had significant influence on the political developments of the country and the region. The revolution impacted greatly on the arts, arguably representing the earliest and most enduring attempt to overcome racial divisions and incorporate the Indian heritage into the national identity.

- Rule of Porfirio Diaz from 1884; political control; contribution to discontent
- Causes of the Mexican Revolution: social, economic and political
- The revolution and its leaders (1910–1917): ideologies, aims and methods of Madero, Villa, Zapata, Carranza; achievements and failures; the 1917 Constitution—nature and application
- Construction of the post-revolutionary state (1920–1940): Obregón, Calles and the Maximato; challenges; assessment of their impact in the post-revolutionary state
- Lázaro Cárdenas and the renewal of the revolution (1934–1940): aims, methods and achievements
- The role of foreign powers (especially the United States) in the outbreak and development of the Mexican Revolution; motivations, methods of intervention and contributions
- Impact of the revolution on women, the arts, education and music

### **12: The Great Depression and the Americas (mid 1920s–1939)**

This section focuses on the causes and nature of the Great Depression as well as the different solutions adopted by governments in the region, and the impact on these societies. The Great Depression produced the most serious economic collapse in the history of the Americas. It affected every country in the region and brought about the need to rethink economic and political systems. The alternatives that were offered, and the adaptations that took place, marked a watershed in political and economic development in many countries in the region. With respect to the last three bullets, a case-study approach should be adopted, using **one** country from the region as an example. The chosen country should be identified in the introduction to the examination answers.

- The Great Depression: political and economic causes in the Americas
- Nature and efficacy of solutions in the United States: Hoover; Franklin D Roosevelt and the New Deal
- Critics of the New Deal; impact of the New Deal on US political and economic systems
- Nature and efficacy of solutions in Canada: Mackenzie King and RB Bennett
- Impact of the Great Depression on Latin America; political instability and challenges to democracy; economic and social challenges
- Latin American responses to the Great Depression: import substitution industrialization (ISI); social and economic policies; popular mobilization and repression
- Impact of the Great Depression on society: specifically the impact on women and minorities; impact of the Great Depression on the arts and culture

### **13: The Second World War and the Americas (1933–1945)**

As the world order deteriorated in the late 1930s, resulting in the outbreak of war in Europe and Asia, the countries of the region reacted in different ways to the challenges presented. This section focuses on the changing policies of the countries in the region as a result of growing political and diplomatic tensions prior to, and during, the Second World War. It also examines the impact of the war upon the Americas.

- Hemispheric reactions to the events in Europe and Asia: inter-American diplomacy; cooperation and neutrality; Franklin D Roosevelt's Good Neighbour policy—its application and effects
- Involvement and participation of any **two** countries of the Americas in the Second World War
- Social impact of the Second World War; impact on women and minorities; conscription
- Treatment of Japanese Americans, Japanese Latin Americans and Japanese Canadians
- Reasons for, and significance of, US use of atomic weapons against Japan
- Economic and diplomatic effects of the Second World War in any **two** countries of the Americas

#### 14: Political developments in Latin America (1945–1980)

This section focuses on domestic and political developments in Latin America after 1945. Most Latin American countries experienced social, economic and political changes and challenges. Political responses to these forces varied from country to country—from the continuation of democracy to “populist” movements to outright conflict, revolution and the establishment of authoritarian regimes in the 1960s and 1970s. Areas of study include: conditions for the rise to power of new leaders; economic and social policies; treatment of minorities.

- The Cuban Revolution: political, social and economic causes
- Rule of Fidel Castro: Cuban nationalism; political, economic, social and cultural policies; treatment of opposition; successes and failures; impact on the region
- Populist leaders in **two** countries: rise to power and legitimacy; ideology; social, economic and political policies; the treatment of opposition
- Democracy in crisis: reasons for the failure of elected leaders
- Rise of a military dictatorship in **one** country: reasons for their rise to power; economic and social policies; repression and treatment of opposition
- Guerrilla movements in **one** country: origins, rise and consequences
- Liberation theology in Latin America: origins, growth and impact

#### 15: Political developments in the United States (1945–1980) and Canada (1945–1982)

This section explores the domestic concerns and political developments in the United States and Canada, with a specific focus on the domestic policies and achievements of particular leaders in each country. In the United States, there is also a focus on economic development and the changing composition of the main political parties. In Canada, there is an exploration of the separatism of the Quiet Revolution.

- Truman and the Fair Deal; division within Democratic Party; congressional opposition; domestic policies of Eisenhower
- Kennedy and the New Frontier; Johnson and the Great Society
- Nixon’s domestic policies; Watergate and possible impeachment; Ford’s domestic policies and pardon of Nixon; Carter’s domestic policies; changing composition and internal conflicts within the Democratic and Republican parties in the 1960s and 1970s, and the impact on elections
- Domestic policies of Canadian prime ministers: St Laurent, Diefenbaker; political stability and nationalism; social and political change under Pearson and Trudeau
- Causes and effects of the Quiet Revolution; rise of Quebec nationalism, the Front de Libération du Québec (FLQ) and the October Crisis of 1970

#### 16: The Cold War and the Americas (1945–1981)

This section focuses on the development and impact of the Cold War on the region. Most of the second half of the 20th century was dominated by the global conflict of the Cold War. Within the Americas, some countries were closely allied to the United States and some took sides reluctantly. Many remained neutral or sought to avoid involvement in Cold War struggles. A few, influenced by the Cuban Revolution, instituted socialist governments. No nation, however, escaped the pressures of the Cold War, which had a significant impact on the domestic and foreign policies of the countries of the region.

- Truman: containment and its implications for the Americas; the rise of McCarthyism and its effects on domestic and foreign policies of the United States; social and cultural impact of the Cold War
- Korean War, the United States and the Americas: reasons for participation; military developments; diplomatic and political outcomes
- Eisenhower and Dulles: New Look and its application; characteristics and reasons for the policy; repercussions for the region



- United States' involvement in Vietnam: the reasons for, and nature of, the involvement at different stages; domestic effects and the end of the war; Canadian non-support of the war; Latin American protest against the war
- United States' foreign policies from Kennedy to Carter: the characteristics of, and reasons for, policies; implications for the region: Kennedy's Alliance for Progress; Nixon's covert operations and Chile; Carter's quest for human rights and the Panama Canal Treaty (1977)
- Cold War in either Canada or **one** Latin American country: reasons for foreign and domestic policies and their implementation

### **17: Civil rights and social movements in the Americas post-1945**

This section examines the origins, nature, challenges and achievements of civil rights and social movements after 1945. Causes of some of these movements may be pre-1945. These movements represented the attempts to achieve equality for groups that were not recognized or accepted as full members of society, and they challenged established authority and attitudes.

- Indigenous peoples and civil rights in the Americas
- African Americans and the civil rights movement: origins, tactics and organizations; the US Supreme Court and legal challenges to segregation in education; ending of segregation in the south (1955–1980)
- Role of Dr Martin Luther King Jr in the civil rights movement; the rise of radical African American activism (1965–1968): Black Panthers; Black Power and Malcolm X; role of governments in civil rights movements in the Americas
- Feminist movements in the Americas; reasons for emergence; impact and significance
- Hispanic American movement in the United States; Cesar Chavez; immigration reform
- Youth culture and protests of the 1960s and 1970s: characteristics and manifestation of a counter-culture

### **18: The Americas (1980–2005)**

This section focuses on changing trends in foreign and domestic policies in the Americas. In the latter decades of the 20th century, the region experienced significant political, social, cultural and economic changes. The section also considers the transitions to democracy in Latin America and the challenges encountered.

- The United States: domestic policies of presidents Reagan, GHW Bush and Clinton; challenges; effects on the United States; impact upon the hemisphere; continuities and changes in US foreign policy: Reagan, GHW Bush and Clinton; from bipolar to unilateral power; impact on the region
- Canadian domestic policies: Mulroney governments (1984–1993), collapse of the Progressive Conservative Party; Chrétien in power (1993–2003), Quebec and separatism
- Transition to democracy in **two** countries of Latin America: reasons for democratization; role of internal and external factors
- Post-transition challenges in **two** countries of Latin America: economic challenges and debt; justice and reconciliation; political parties and the role of the military
- Violent and non-violent movements in **two** countries of Latin America: causes, aims and impact; role of religion, including liberation theology
- Economic and political cooperation in the Americas: reasons for and impact
- Terrorism; 9/11 and response: domestic impact



## HL option 3: History of Asia and Oceania

Three sections must be selected for study. Only people and events named in the guide will be named in the examination questions.



**Figure 6**  
*Asia and Oceania map*

### **1: Trade and exchange: The Silk Road in the medieval world (750–1500)**

This section focuses on the series of trade routes known as the Silk Road from 750 until 1500. It examines the important role of the Silk Road not only in facilitating interregional trade, but also the part it played in the transmission of ideas and cultures. The impact of the Mongol Empire on the Silk Road and the causes of its decline and fragmentation in the 15th century are significant components of this section.

- The Silk Road under the Tang dynasty
- Connecting west and east: interregional trade; travellers and explorers; merchants; missionaries and pilgrims; Ibn Battuta and Marco Polo

- Increase in trade under the Mongol Empire: role of Mongol expansion and empire in re-establishing and increasing trade; establishment of political centres of the Mongol Empire; Tamerlane; Samarkand
- Political and cultural integration: connection of previously isolated nomadic societies; political unification of zones
- Cultural interaction and exchange: transmission of religious ideas and art
- Decline in the 15th century: causes of decline; rise in seaborne trade; fragmentation and loosening of political, cultural and economic unity after the end of the Mongol Empire

## **2: Japan in the Age of the Samurai (1180–1333)**

This section focuses on Japan during the Kamakura Shogunate, and on the expanding role of the samurai during this period. In addition to exploring the increasing political influence of the samurai, this section also examines the characteristics of samurai life, as well as the impact of the samurai on Japanese society and culture. It looks at conflicts within the period, both internal conflicts between rival samurai clans, and also external conflict with the Mongol Empire in the form of the invasions of Japan by the Yuan dynasty in the late 13th century.

- The Gempei War (1180–1185) and the establishment of the Kamakura Shogunate
- The expanding role of the samurai under Minamoto; rising military and economic power; replacement of court government with the samurai; role in developing law
- Struggles between samurai clans
- Establishment of the first samurai-dominated government; declining power of the emperor
- Samurai life: samurai ethos/ethical code or “Bushido”—the way of the warrior; focus on group loyalty and discipline; influence of Buddhism; samurai weapons and armour; the role of samurai women
- Impact of the samurai on Japanese society and culture
- The Mongol invasions of Japan and the kamikaze storms (1274 and 1281)

### 3: Exploration, trade and interaction in East Asia and South-East Asia (1405–1700)

This section focuses on the reasons for, and impact of, European and East Asian exploration of the region. Early European settlements should be examined, with a focus on the impact the settlers had on the indigenous societies. It also includes examination of the motives of China and Japan for “turning in” and adopting more isolationist policies. This section focuses heavily on the issue of trade, but social and cultural interactions should also be addressed.

- China “looking out”: Chinese shipbuilding programme; “treasure ships”; construction of an imperial fleet; the voyages of Zheng He (Cheng Ho); increased overseas trade
- Japan “looking out”: trade links established with Portugal (1543); arrival of traders from other European countries; missionaries
- The significance and impact of the beginnings of Indo-European trade: Vasco da Gama (1498); the capture of Malacca (1511); Magellan’s journey (1519)
- Reasons for, and impact of, the expeditions, and nature of the settlements, of the Spanish, Portuguese, French, Dutch and British; impact of European settlements on the indigenous people; social, religious and cultural exchange; demographic and territorial changes
- China “turning in”: increased Chinese isolationism; isolationist policies; restrictions on ships, including destruction of ocean-going ships (1525)
- Japan “turning in”: Japanese isolationism in the 17th century; *sakoku* (closed country policy) restrictions on foreigners entering Japan and Japanese leaving Japan; strict regulations on trade and commerce; creation of four “gateways”
- Social, political and economic impact of isolation on China and Japan

### 4: The rise and fall of the Mughal Empire (1526–1712)

This section provides the opportunity to study in depth the last dynasty before the arrival of Europeans in the subcontinent. It examines the rise and consolidation of power, as well as opposition to Mughal rule. It begins with the foundation of the Mughal Empire by Babur in 1526, and ends with the death of Bahadur Shah in 1712.

- Origins and rise of Mughal power: Babur and Humayun
- Consolidation of Mughal rule in the subcontinent: domestic, military, religious, economic and cultural policies
- Significance of individual rulers for the Mughal Empire: Akbar, Shah Jahan I and Aurangzeb
- Impact of religious cooperation and conflict in the Mughal Empire
- Reasons for, and effects of, domestic opposition
- Social, cultural and economic achievements
- Role of internal and external forces in the decline of the Mughal Empire

### **5: Colonialism and the development of nationalism in South-East Asia (c1750–1914)**

This section focuses on the impact of European and American imperialism and colonialism upon the indigenous societies and political systems of South-East Asia. It analyses the reasons for expansion into this area and the nature and effects of colonization. Similarities and differences between colonial systems and the responses of the colonized peoples to the colonizers should be assessed, along with the factors that led to the beginnings of nationalism. The section concludes by assessing the extent to which these countries had developed a national identity by the outbreak of the First World War.

- Political structure and the economic, social and cultural effects of the Dutch colonial system in Indonesia: culture system; liberal policy; decline of the Dutch East India Company (VOC); increasing Dutch state control and the introduction of the Ethical Policy (1901)
- Political structure and the economic, social and cultural effects of the French colonial system in Indo-China: factors that led to the formation of French Indo-China (1887)
- Political structure and the economic, social and cultural effects of the Spanish colonial system in the Philippines: Philippine Revolution (1896); significance of Rizal, Bonifacio and Aguinaldo
- The Philippines and the United States: Spanish-American War (1898); colonial rule by the United States
- The beginnings of nationalism in Indonesia, Philippines and Indo-China
- Siamese monarchy; internal and external factors that maintained independence; Rama IV (Mongkut), Rama V (Chulalongkorn)

### **6: India, Afghanistan and Burma (1750–1919)**

This section focuses on the spread of European imperialism into the Indian subcontinent and surrounding countries, and the subsequent rivalry between Britain, France and Russia. It analyses the reasons for expansion into these regions, and the nature and effects of the eventual British ascendancy. The successes and failures of resistance to British rule should also be examined.

- Expansion of the British East India Company: Battle of Plassey (1757); Anglo-Maratha Wars; Anglo-Mysore Wars
- Economic, social and cultural effects of the British colonial system in India; role of the British East India Company (1773–1857); impact of the policies of Dalhousie and Bentinck
- Causes of the Great Revolt (Indian Mutiny) of 1857; political, social and economic consequences of the Great Revolt
- Key developments 1858–1914: Government of India Act 1858; the partition of Bengal (1905); the Morley–Minto reforms of 1909; outbreak of the First World War; social and economic impact of the British Raj
- Development and significance of constitutional groups; growth of national consciousness; Indian National Congress (1885) and the All India Muslim League (1906)
- Afghanistan: Russo-British rivalry; “The Great Game”; North-West frontier; First, Second and Third Anglo-Afghan Wars; policies of the Afghan monarchy; resistance to British influence
- Burma: King Mindon; King Thibaw; reasons for loss of independence; First, Second and Third Anglo-Burmese Wars; economic, social and cultural effects of the British colonial system in Burma; rise of resistance and nationalism

### **7: Challenges to traditional East Asian societies (1700–1868)**

This section focuses on imperial China and Japan in the mid-18th century to the mid-19th century as they responded to the challenges posed by the arrival of the western powers and their demands for trade, diplomatic representation and the rights of their citizens. Western intrusion coincided with domestic social and economic changes that were challenging the status quo and placing the existing regimes under strain.

- The nature and structure of imperial rule under the Qing dynasty; Qianlong
- Causes and effects of internal challenges; White Lotus Rebellion
- The Chinese tribute system and western trade missions
- Causes and consequences of the First and Second Opium Wars; the unequal treaties
- Taiping (Taip'ing) Rebellion: reasons for the rise and fall; consequences for Chinese society
- The Tokugawa Shogunate's rule in Japan: economic and social structure
- Internal challenges; social and economic changes and reasons for discontent
- Commodore Perry's expedition and the crisis of the Bakumatsu period (1853–1868); reasons for the fall of the Tokugawa Shogunate

### **8: British colonialism and emerging national identities in Oceania (1788–1919)**

This section focuses on the reasons for, and nature of, British colonial rule of Australia, New Zealand and the Pacific Islands in the mid-19th century to the early 20th century. The nature and extent of the impact of settlers on indigenous societies should be assessed, along with the reasons why conflict emerged between the settlers and indigenous peoples. The section concludes by examining the significance of the First World War for the development of Australia and New Zealand.

- Indigenous societies and the impact of early colonial settlements; Treaty of Waitangi (1840)
- Settlement schemes; immigration to Australia and New Zealand; early colonial settlements; land distribution; pastoral society; squatters and the Selection Acts
- Reasons for, and impact of, tensions between indigenous people and the settlers
- Social and economic impact of the gold rushes; growth of cities; emergence of the labour movement
- Constitutional developments; growth of national identity; the federation movement; National Australasian Conventions; the achievement of dominion status in Australia (1901) and New Zealand (1907)
- Political, social and economic impact of the First World War on Australia and New Zealand; Australian and New Zealand Army Corps (ANZACs); significance of Gallipoli
- The nature and impact of British administration in the Pacific Islands

### **9: Early modernization and imperial decline in East Asia (1860–1912)**

This section focuses on developments in China and Japan between the mid-19th century and early 20th century. It examines the largely unsuccessful attempts at modernization and reform in China. The conservative and popular opposition to change was demonstrated by the failures of the Self-Strengthening Movement and the Hundred Days' Reform, and by the violence of the Boxer Rebellion. In contrast, Japan modernized rapidly and successfully during this period to emerge as a country that challenged the power of the western nations in Asia.

- Tongzhi restoration and Self-Strengthening Movement (1861–1894); Cixi
- Impact of defeat in the Sino-Japanese War (1894–1895); Guangxu and the Hundred Days' Reform (1898)
- Boxer Rebellion (1900–1901); the late Qing reforms

- Sun Yixian and the causes of the 1911 Xinhai Revolution; the reasons for its failure
- Meiji restoration (1868) in Japan; the 1889 Constitution
- Social, cultural and economic developments in Meiji Japan
- The rise of Japanese military power; victory in the Sino-Japanese War (1894–1895) and the Russo-Japanese War (1904–1905)
- Korean isolation: Queen Min; opening (1876); Tonghak Rebellion (1894); Japanese annexation (1910)

### **10: Nationalism and independence in India (1919–1964)**

This section focuses on nationalism in India, from the end of the First World War to the achievement of Indian independence and the development of India to 1964. The significance of key groups and individuals should be assessed, as should the factors that led to the partition of the South Asian subcontinent and the subsequent domestic policies that consolidated the power of the Indian state.

- Impact of the First World War: demands for Home Rule
- Significance of key political developments, including Amritsar massacre (1919); Government of India Act 1919; Simon Commission (1928); Round Table Conferences (1930–1932); response to Government of India Act 1935
- Role and importance of key groups and individuals: Indian National Congress and the All India Muslim League; Gandhi; Jawaharlal Nehru; Jinnah
- Struggle for independence; non-cooperation movement; civil disobedience campaigns; Salt March (1930); Quit India campaign (1942)
- Growth of Muslim separatism; “Two-Nation” theory; Lahore Resolution (1940)
- Impact of the Second World War: Chandra Bose; the Cripps Mission (1942); weakening of British power; Mountbatten; achievement of independence; reasons for the partition of the South Asian subcontinent (1947)
- Post-independence India: ethnic and religious conflicts; princely states; Kashmir; successes and failures of Nehru’s domestic policies

### **11: Japan (1912–1990)**

This section begins with post-Meiji Japan and the reasons for Japan’s failure to successfully establish a democratic system of parliamentary government. It explores the rise of militarism and extreme nationalism that led to expansion in Manchuria and China. It also examines the desire to establish a Japanese empire in East and South-East Asia and the Pacific, known as the Greater East Asia Co-Prosperity Sphere.

- The impact of the First World War and the post-war conferences
- Taisho democracy: the growth of liberal values and the two-party system
- Reasons for, and impact of, the rise of militarism and extreme nationalism: increasing influence of the army in politics; political coups and assassinations
- Invasions of Manchuria (1931) and China (1937), and impact on relations with the West; Three Party/ Tripartite Pact (1940); US embargo (1940)
- Japan and the Pacific War (1941–1945): decision to attack Pearl Harbor; initial successes; reasons for defeat
- The US occupation (1945–1952): social, political and cultural changes; the reverse course (1950)
- Reasons for Japan’s “economic miracle”; social, cultural and economic impact of globalization

## 12: China and Korea (1910–1950)

This section focuses on China and Korea between 1910 and 1950. It examines the rise of nationalism and communism in China after the establishment of the Chinese Republic, as well as the nature of Japanese rule of Korea, which had been formalized with the annexation in 1910, and which became more oppressive during the years of the Sino-Japanese War. The section concludes by examining the reasons for the victory of the communists in the Chinese Civil War and the consequences of this defeat for the nationalists.

- Rise of national identity in China: Yuan Shikai; Sun Yixian; 21 Demands (1915); new culture movement; Treaty of Versailles (1919); May Fourth movement (1919); effects of warlordism
- Nationalist rule of China: Guomindang leadership and ideology; Jiang Jieshi; successes and failures of domestic policy during the Nanjing decade (1927–1937)
- Rise of communism in China: Chinese Communist Party (CCP) ideology; First United Front; Shanghai massacre (1927); Yan'an; Jiangxi Soviet; Long March; Mao Zedong
- Impact of Japanese invasion of China; Manchuria (1931); Second United Front; Sino-Japanese War (1937–1945); Chinese Civil War (1946–1949); nature of conflict; reasons for communist victory
- Impact of Japanese rule of Korea: social, political and economic effects of annexation (1910); impact of the Sino-Japanese War on Korea: Japanese use of forced labour, conscription and comfort women; division of Korea at 38th parallel (1945); Syngman Rhee; Kim Il-Sung
- Taiwan and Republic of China (ROC): nature of Jiang Jieshi's rule: martial law (1949); White Terror (1950); beginnings of Taiwanese independence movement

## 13: Impact of the world wars on South-East Asia

This section focuses on the changes produced in the region by the First and Second World Wars. The region was affected by both wars, although the Second World War impinged more directly on the region itself. The First World War and the Treaty of Versailles led to the spread of political ideas such as self-determination and nationalism in the region; in the Second World War the defeat of the colonial powers by Japan lowered the prestige of the European powers and provided opportunities for nationalists to assert their claims for independence.

- Impact of the First World War; Treaty of Versailles (1919)
- Reasons for, and effects of, initial Japanese victories in South-East Asia (1940–1942)
- The nature and impact of Japanese occupation
- Growth of nationalism and role of independence movements during the war in Dutch East Indies/Indonesia; Vietnam; Malaya: resistance and collaboration
- Emergence and influence of leaders: Sukarno; Ho Chi Minh; Tunku Abdul Rahman
- The reasons for Indonesian independence (1949)
- Case study on **one** country in South-East Asia (other than one already named in this section): political, social and economic effects of the First World War and the Second World War

#### **14: The People's Republic of China (1949–2005)**

This section focuses on China under the rule of the Chinese Communist Party, and the great changes as the Communist Party under Chairman Mao Zedong (Mao Tse-tung) extended its rule and Mao's vision of a socialist state. The focus of this section is on the impact of domestic political, social and economic policies. It also examines modernization of China's economy since Mao's death.

- Consolidation of the communist state (1949–1961) under Mao Zedong; key policies; land reforms; rectification campaigns; Hundred Flowers campaign (1956)
- Transition to socialism; successes and failures in economic developments (1949–1961); First Five-Year Plan; Great Leap Forward; Second Five-Year Plan
- Social developments; women's rights; health; education
- Great Proletarian Cultural Revolution: causes; Gang of Four; political, social and cultural impact
- Foreign policy and foreign affairs 1949–1976; Sino-American relations; establishment and breakdown of Sino-Soviet relations; China as a regional and global power
- Power struggle following the death of Mao Zedong; Hua Guofeng, the re-emergence of Deng Xiaoping and the defeat of the Gang of Four
- China under Deng Xiaoping (1976–1997); economic developments; Four Modernizations; political developments; causes and effects of Tiananmen Square (1989); Jiang Zemin

#### **15: Cold War conflicts in Asia**

This section focuses on the impact of the Cold War and communism on Asia after the Second World War. It examines the reasons for the outbreak of conflict in Malaya, the Korean peninsula, Vietnam, Cambodia and Afghanistan, as well as the nature of these conflicts and the significance of foreign involvement. The impact of these conflicts in the following 10 years should also be examined.

- Malaya: Emergency (1948–1960): the Malayan Communist Party (MCP); British/Commonwealth response; nature of conflict; resolution and legacy
- Korea: Korean War (1950–1953): causes; international responses; outcome; economic and political impact on the Korea peninsula
- Vietnam: League for the Independence of Vietnam (Viet Minh); Ho Chi Minh; French Indo-China War (1946–1954); Vietnam War (1956–1975): causes; nature of conflict; international involvement; outcome; economic and political effects on Vietnam
- Cambodia: failures of Sihanouk's rule; Khmer Rouge ideology; Pol Pot; impact of Vietnam War; nature and impact of Khmer Rouge's regime; invasion by Vietnamese, and civil war; international response; 1993 elections
- Afghanistan: reasons for, and impact of, Soviet invasion (1979); nature of conflict; international involvement; withdrawal of Soviet troops (1989); civil war (1989–1992)

#### **16: Developments and challenges in South Asia after 1947**

This section focuses on the history of South Asia post-1947. The challenges facing the newly created nations of Pakistan, Bangladesh and Ceylon/Sri Lanka should be examined, as well as the different approaches of governments/leaders to these challenges. The reasons for, and impact of, conflict in the region should also be addressed.

- Foreign policy and economic developments under Nehru: relationship between India and Pakistan; Indo-Pakistani Wars—1947, 1965, 1971; causes and results; independence of Bangladesh (1971)
- India: social, political and economic developments and challenges under Indira Gandhi, Rajiv Gandhi and Rao



- Pakistan 1947–1991: nation building; social, political and economic developments and challenges; friction between East and West Pakistan; cultural and linguistic differences; constitutional referendum (1991); Jinnah; Ayub Khan; Zulfikar Ali Bhutto; Zia-ul-Haq; Benazir Bhutto
- Bangladesh: nation building; social, political and economic developments and challenges
- Ceylon/Sri Lanka: nation building; social, political and economic developments and challenges; conflict between Sinhalese and Tamils; 1971 uprising; civil war; Sirimavo Bandaranaike

### 17: Developments in Oceania after the Second World War (1945–2005)

The events of the Second World War in Asia undermined Australia and New Zealand's reliance on Britain and they subsequently looked to the United States for help to combat the Japanese threat. The defeat of Japan altered strategic thinking in Australia and New Zealand, both joining in alliances with the United States and both following a strongly anti-communist line. Both countries became more multicultural as a result of immigration, not just from Britain and Europe, but also, by the 1960s, from Asia. Both were active in international organizations and played more independent roles in world affairs, particularly in Asia and the Pacific. Ties with Britain weakened and economic links were forged with Japan and, later, with the emerging economies of China, South-East Asia and the Pacific Islands.

- Social and cultural developments; changing role of women; growth of national identity
- Immigration to Australia and New Zealand after the war, and the development of multicultural societies
- Policies and achievements of governments in Australia: Curtin; Chifley; Menzies; Whitlam; Fraser; Hawke/Keating
- Policies and achievements of governments in New Zealand: Fraser; Holyoake; Muldoon; Lange; Bolger
- Attitudes and policies towards indigenous peoples in Australia and New Zealand
- Australia and New Zealand: foreign policy and international alignments
- Economic policies and realignment: Britain joining the EEC (later European Union); the rise of Asian economies
- Reasons for, and results of, the emergence of independent Pacific Island states

### 18: Social, cultural and economic developments in Asia (excluding China, Japan and India) (1980–2005)

This section requires candidates to complete **two** case studies. They should choose any **two** countries from Asia (excluding China, Japan and India). The chosen countries should be identified in the introduction to the examination answers.

- Impact of globalization: causes and effects of economic growth; technological development; urbanization; demographic changes; changes in standards of living; economic and social impact of the tourist industry
- Immigration/emigration: causes and effects
- Social issues and developments: changes in social structures; gender roles; the environment; education; health reforms; impact of technology on society
- Religion: role of religion in society; religious conflict and tensions
- Cultural change: nature of, and changes in, traditional arts and culture; cultural impact of globalization; nature and role of the media
- Emergence of, and responses to, terrorism

## HL option 4: History of Europe

**Three** sections must be selected for study. Only people and events named in the guide will be named in examination questions.

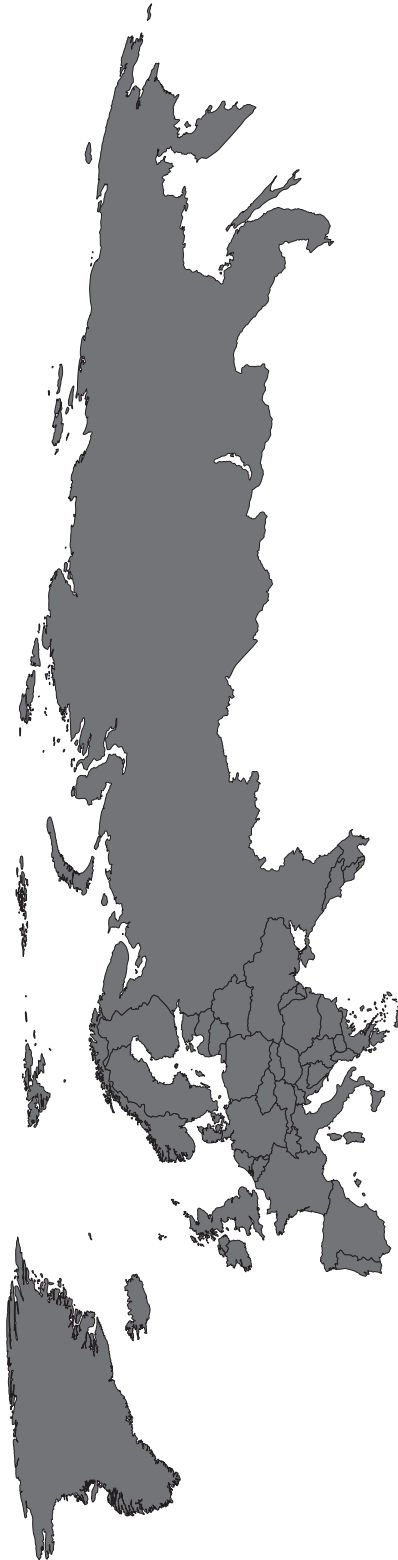


Figure 7  
*Europe map*

## 1: Monarchies in England and France (1066–1223)

This section deals with the establishment, characteristics and changing nature of royal government in England and France. It is concerned with the impact of the Norman invasion of England, which introduced many changes in government and administration. During the second half of the 11th and 12th centuries, monarchies in England and France became more sophisticated and powerful by substantiating their claims to increased authority, although noble power remained a key feature in both.

- Pre-Norman England and the impact of the Norman invasion
- Normans in England: William I, Duke of Normandy (King of England 1066–1087); establishment of authority; domestic and foreign policies; Domesday Book; Henry I (1100–1135)
- Angevin Commonwealth: Henry II (1154–1189); policies in England, Ireland and Gascony
- The Duchy of Normandy and its relations with France: rivalry and wars between the dukes of Normandy, as kings of England, and the kings of France; role played by John, Richard I, Henry II and Phillip II; effects in England and France
- Extension of the royal demesne and power in France under the Capetians (1108–1223); expansion of Capetian power under Louis VI, Louis VII and Phillip II, the nature of their governments, and reasons for their success in expanding royal authority
- Comparison of the nature of royal government in England and France

## 2: Muslims and Jews in medieval Europe (1095–1492)

This section addresses aspects of the experience of Jews and Muslims from 1095–1492 in Europe. Spain and Sicily had large Muslim populations. In Spain this was a product of conquest by Muslim armies and the foundation of Muslim-ruled states. In Sicily, the Muslims had migrated in large numbers, and by the late 11th century, they had come under Norman rule. This section will address the broader reasons for hostility to Muslims, as well as the reasons for, and results of, co-existence in Spain and Sicily. The reasons for, and results of, persecution of Jews will also be examined.

- Reasons for hostility to Muslims: the Crusades; fear of Muslim power; Christian doctrine and teaching
- Reasons for Christian opposition to the Muslim states in Spain: religious motivation; economic ambition
- Continuous conflict between the Christian-ruled and Muslim-ruled states in Spain: results: warfare on the borders between Christian and Muslim states, for example, the Mediterranean and the Balkans; loss of economic activity and loss of cultural and intellectual diversity; growth of anti-Muslim feelings
- The role and contribution of Jews in medieval Europe: finance; trade; participation in royal bureaucracy and scholarship
- The reasons for persecution of Jews: religious hysteria during the Crusades; official and/or popular anti-Semitism and scapegoating; belief in Jewish culpability for the Black Death
- Impact of persecution of Jews: massacres; expulsion; segregation from society
- Impact of Jewish persecution on society: loss of skill and ability in economic, intellectual and cultural life

### 3: Late medieval political crises (1300–1487)

This section deals with several crises of royal authority during the late medieval period that resulted in problems of legitimacy. Also, the conflicts between kingdoms often caused internal political instability owing to increased taxation and loss of political confidence. The source of these conflicts, and the major participants, should be examined in order to understand both their causes and effects.

- Succession crises in England: Edward II (1307–1327); Richard II (1377–1399)
- The Hundred Years War 1337–1360 and 1369–1389: causes, course, impact and significance
- The Hundred Years War 1415–1453: reasons for the re-emergence of war; importance of Aquitaine; reasons for the outcome; impact in England and France
- The rise and fall of ducal Burgundy (1363–1477)
- Crisis of monarchy and challenges to royal authority in 15th-century England and France: Wars of the Roses and the War of the Public Weal
- Nature of kingship and challenges: England—Henry VI (1422–1461); Edward IV (1461–1483); France—Louis XI (1461–1483)
- The Wars of the Roses: causes; events; impact on England, including impact on government and royal authority

### 4: The Renaissance (c1400–1600)

This section examines the origins and characteristics of Renaissance government and society in Italy in the 14th century, and its later spread throughout Europe. The wealth and cultural vitality of the Italian cities played a crucial role in the Renaissance. Powerful princely and ecclesiastical patrons promoted art for a range of reasons—economic, political and dynastic. This period also saw the advent of new ideas on the nature of authority and the state.

- Origins, causes and development of the Renaissance in Italy; social and political situation in Florence
- Forms of government in Italian city states: Milan; Florence; Venice
- The importance of patronage: role and significance of Lorenzo de Medici and Ludovico Sforza; papal patronage
- Cultural and intellectual developments: art, literature, architecture and political writings
- The northern Renaissance: spread to Burgundy and Germany
- Case study of the spread and impact of the Renaissance to **one** European country not already mentioned in this section

### 5: The Age of Exploration and its impact (1400–1550)

The increasing wealth and secularization of western society combined with new technological and scientific advances contributed to the growth of long-distance, overseas travel. This section focuses on exploration and expansion both westwards to the Americas and eastwards to the Indian Ocean and the Spice Islands. It examines the motives and enablers of Spanish and Portuguese exploration, as well as the impact of this exploration on Europe.

- Motives for exploration and reasons for its increase in the 15th century: religion and exploration; national and personal rivalries; the quest for knowledge; opening up of new trade routes for luxury goods
- Enablers of exploration: patronage, including role and significance of Henry the Navigator; developments in shipbuilding, cartography and navigation
- Portuguese exploration of the west coast of Africa: significance; consequences; impact on indigenous peoples

- Exploration and the New World: significance; consequences; impact on indigenous peoples
- Exploration and the Indian Ocean: significance; consequences; impact on indigenous peoples
- The significance and impact of the Treaty of Tordesillas (1494)
- Impact on Europe to 1550: economic impact on Europe; the “Columbian Exchange”

### 6: The Reformation (1517–1572)

This section focuses on religious change in Europe in the 16th century. It examines the development of Protestantism, including its origins and spread, within Germany and more broadly. The attitudes of kings and princes will also be considered, especially those who protected and fostered Protestantism. There will also be focus on the religious reasons for the spread of Protestantism. The section also includes the reactions of the papacy and the Catholic powers to Protestantism, and the outbreak of religious conflict up to 1572.

- The state of the Catholic church in Europe at the start of the 16th century, and reasons for criticism
- The religious ideas and impact of Luther and Calvin
- Reasons for the successful spread of Lutheran ideas in Germany to 1547, including the attitudes of the German princes
- Religion and conflict in Germany: the Peasants’ War; the Schmalkaldic League and the Peace of Augsburg (1555)
- The role of spread and impact of Protestant ideas in any **one** of England, Scotland, France or the Netherlands: religious factors; aims and role of rulers; economic reasons; popular sentiments; religious conflicts
- The Catholic Reformation: spiritual movements; the Jesuits and other Catholic orders; clerical education and discipline; the Council of Trent (1545–1563)

### 7: Absolutism and Enlightenment (1650–1800)

This section focuses on Enlightenment ideas in Europe and their political impact. There is an opportunity to examine absolutist monarchies in the late 17th and early 18th centuries, and then to explore “enlightened despotism” to see how significant the changes made by “enlightened” monarchs in the later 18th century really were. Monarchical patronage of the arts was very significant in this period and students have the opportunity to study the artistic legacy of monarchs such as Louis XIV and art/architecture, or Joseph II and the music of Mozart. There is also a focus of social and economic change in the later 17th and 18th centuries as cities grew and agriculture began to be improved.

- The goals and development of Enlightenment ideas; the Scientific Revolution
- Case study of Enlightenment ideas and their political impact in any **two** of Germany, England, Scotland, France, Spain, the Dutch Republic or Italy)
- Case study of any **two** absolutist monarchs: nature of their rule; extent of their power; foreign policy
- Case study of any **two** enlightened despots: policies and their impact; extent of change
- Social and economic change in the Enlightenment era; growth of cities; agricultural change
- Monarchy, patronage and the arts; the Baroque movement

## 8: The French Revolution and Napoleon I (1774–1815)

This section deals with the origins, outbreak, course and impact of the French Revolution. It focuses on the social, economic, political and intellectual challenges confronting the *Ancien Régime* and the stages of the revolutionary process during this period, culminating in the rise and rule of Napoleon Bonaparte. The section requires investigation of the impact of the French Revolution, as well as Napoleon's domestic and foreign policies, upon France and its European neighbours.

- Crisis of the *Ancien Régime*: role of the monarchy, specifically Louis XVI; intellectual, political, social, financial and economic challenges
- Monarchy to republic: causes and significance of the Revolution; the 1791 Constitution; the fate of the monarchy; the terror; Robespierre; the Thermidorean reaction
- The political, social and economic impact of the Revolution; French revolutionary wars (1792–1799)
- Establishment of, nature of, and collapse of the Directory (1795–1799)
- Rise and rule of Napoleon (1799–1815); impact of Napoleon's domestic and foreign policies on France
- Napoleonic Wars (1803–1815); collapse of the Napoleonic Empire; military defeat; the Hundred Days

## 9: France (1815–1914)

This section examines the history of France in the 19th and the early 20th century, up to the outbreak of the First World War in 1914. The focus is on political change, both dynastic and constitutional, the reigns of Louis XVIII and Charles X, followed by consideration of Louis Philippe and the 1848 Revolution. The brief Second Republic is examined, followed by the emergence of Louis-Napoleon and his establishment of the Second Empire. Finally, the Third Republic is discussed, looking at political aspects of France at the end of the 19th century.

- The Bourbon restoration, the Congress of Vienna and its impact on France
- The reigns of Louis XVIII and Charles X: politics and society (1815–1830)
- Revolution of 1830 and the July Monarchy of Louis Philippe; reasons for the collapse of the July monarchy
- 1848 Revolution: Second Republic, repression and the emergence of Louis-Napoleon and the Second Empire
- Napoleon III and the Second Empire: domestic policies; stability; opposition; periods of reform; foreign policies, including Crimean War and interventions in Italy and Mexico
- Third Republic (1871–1914): stability and crises 1871–1890—problems in establishing the Republic and Boulangisme; 1890–1914—Dreyfus, growth of political extremes, corruption

## 10: Society, politics and economy in Britain and Ireland (1815–1914)

This section focuses on the history of Britain in the 19th and the early 20th centuries, up to the outbreak of the First World War. It examines the social and political situation at the end of the Napoleonic Wars, including an emphasis on social protest and reform through the study of Chartism and the eventual repeal of the Corn Laws. It then examines social and economic change in the Victorian period, as well as the emergence of the two main British political parties of the 19th century: the Liberals and the Conservatives. It ends with a study of British society and politics on the eve of the First World War, including political crises and threats to the established order such as the suffragettes and the growth of the trade unions.

- Social protest (1815–1848): Peterloo; Chartism—reasons for emergence and failure; Peel and the repeal of the Corn Laws—reasons and consequences; the Irish Famine
- Extension of the franchise: reasons for, and consequences of, the Reform Acts (1832, 1867 and 1884–1885); impact on the political parties

- Victorian society c1840–c1900: the condition of the working class during the Industrial Revolution; urban poverty, social reforms
- Disraeli, Gladstone and Salisbury: domestic policies; the Irish Question
- Early 20th-century Britain: the emergence of the Labour Party; Lloyd George and social reforms—the “People’s Budget” and the Parliament Act
- Pre-war unrest and protest in Edwardian Britain: women’s suffrage, Ireland, trade unions

### **11: Italy (1815–1871) and Germany (1815–1890)**

This section deals with the history of both Germany and Italy from 1815; in the case of Italy, from the Congress of Vienna to 1871, and in the case of Germany, up to 1890. There is consideration of the impact of the congress system on both Italy and Germany, and of the causes, events and consequences of revolutions from 1815–1849. There is also a focus on the emergence and growth of nationalism in the German states and the Italian peninsula, as well as the social, economic and political factors involved in the unification process.

- Italy (1815–1849): impact of the Congress of Vienna on Italy, Austrian dominance, role of Metternich; nationalism and liberalism; attempted revolutions in Italy between 1820 and 1844; Mazzini and Gioberti; role of the papacy; 1848–1849 Revolutions—causes, nature, defeat and consequences
- Germany (1815–1849): impact of the Congress of Vienna on Germany; nationalism and liberalism in the Vormärz period; economic and social change before 1848; 1848–1849 Revolutions—causes, nature, defeat and consequences
- Unification of Italy (1849–1871); Cavour and Garibaldi; the role of foreign influence
- The rise of Prussia and the decline of Austria (1815–1866); the Zollverein
- Bismarck, Prussia and final unification: diplomatic, economic, military reorganization; Wars of Unification; the 1871 Constitution
- Germany (1871–1890): Bismarck’s domestic policies, including the *Kulturkampf* and the anti-socialist campaign; consolidation of the new German state and the role of Prussia within it

### **12: Imperial Russia, revolution and the establishment of the Soviet Union (1855–1924)**

This section deals with modernization and conservatism in tsarist Russia and the eventual collapse of the tsarist autocracy, as well as the revolutions of 1917, the Civil War and the rule of Lenin. There is a focus on the concepts of change and continuity, with examination and consideration of the social, economic and political factors that brought about change.

- Alexander II (1855–1881): the extent of reform
- Policies of Alexander III (1881–1894) and Nicholas II (1894–1917): economic modernization, tsarist repression and the growth of opposition
- Causes of the 1905 Revolution (including social and economic conditions and the significance of the Russo-Japanese War); consequences of the 1905 Revolution (including Stolypin and the Dumas)
- The impact of the First World War and the final crisis of autocracy in February/March 1917
- 1917 Revolutions: February/March Revolution; provisional government and dual power (Soviets); October/November Revolution; Bolshevik Revolution; Lenin and Trotsky
- Lenin’s Russia/Soviet Union; consolidation of new Soviet state; Civil War; War Communism; New Economic Policy (NEP); terror and coercion; foreign relation

### 13: Europe and the First World War (1871–1918)

This section deals with the shorter- and longer-term origins of the First World War. It covers the breakdown of European diplomacy pre-1914 and the crises that occurred in international relations. It covers how the practice of war affected the military and home fronts. The section also investigates reasons for the Allied victory/Central Powers' defeat.

- European diplomacy and the changing balance of power after 1871; imperial expansion in Africa and Asia, and its impact on European diplomacy; the Congress of Berlin and European Alliance system
- Foreign policy of Kaiser Wilhelm II: domestic conditions that impacted on German foreign policy; its impact/influence on other countries, including Britain, France, Russia and Austria-Hungary
- Causes of the First World War: short- and long-term causes; relative importance of causes; the Alliance system; the decline of the Ottoman Empire; German foreign policy; Austria-Hungary, Russia and Balkan nationalism; the arms race and diplomatic crises; the July Crisis of 1914
- Impact of the First World War on civilian populations of **two** countries from the region between 1914 and 1918
- Factors leading to the defeat of Germany and the other Central Powers, and to the victory of the Entente Powers: strategic errors; economic factors; entry and role of the US; domestic instability in the Central Powers

### 14: European states in the inter-war years (1918–1939)

This section deals with **domestic** developments in certain key European states in the period between the two world wars. It requires the study of **four** European countries: Germany, Italy, Spain and any one other country. The section considers the impact of the end of the First World War, then examines the economic, social and cultural changes in each country during the 1920s and 1930s.

- Weimar Germany: constitutional, political, economic/financial and social issues (1918–1933); initial challenges (1918–1923); “Golden Era” under Stresemann (1924–1929); the crisis years and the rise of Hitler (1929–1933)
- Hitler's Germany (1933–1939): consolidation of power; Hitler's pre-war domestic policies, including economic, social and political policies; nature of the Nazi state; the extent of resistance to the Nazis
- Italy (1918–1939): rise of Mussolini; consolidation of power; Mussolini's pre-war domestic policies, including economic, social and political policies; nature of the fascist state
- Spain (1918–1939): political, social and economic conditions in Spain; the Primo de Rivera regime; polarization and political parties under the Second Republic; Azaña and Gil Robles; causes of the Civil War; foreign involvement; reasons for nationalist victory under Franco
- Case study of domestic political, economic and social developments in **one** European country (other than Germany, Italy or Spain) in the inter-war years.

### 15: Versailles to Berlin: Diplomacy in Europe (1919–1945)

This section addresses international relations in Europe from 1919 to 1945 with initial emphasis on the Paris Peace Settlement: its goals, impact and the problems relating to its enforcement. The section covers attempts to promote collective security and international cooperation through the League of Nations and multilateral agreements (outside the League mechanism), arms reduction and the pursuit of foreign policy goals without resort to violence. This section also addresses the individual foreign policies of Italy, Germany, France, Britain and Russia/Soviet Union, looking at the aims, issues and success of each one. It concludes with a study of the Second World War, looking particularly at the impact of the war and the reasons for German defeat and Allied victory.



- Peace settlements (1919–1923): Versailles; Neuilly; Trianon; St Germain; and Sèvres/Lausanne—aims, issues and responses
- The League of Nations and Europe: successes and failures; the search for collective security; developments in the successor states of central and eastern Europe
- Italian and German foreign policies (1919–1941): aims, issues and extent of success
- Collective security and appeasement (1919–1941): aims, issues and extent of success; role of British, French and Russian/Soviet foreign policies (1919–1941); Chamberlain and the Munich Crisis
- Causes of the Second World War and the development of European conflict (1939–1941); the wartime alliance (1941–1945); reasons for Axis defeat in 1945 and for Allied victory; role of economic, strategic and other factors
- Impact of the Second World War on civilian populations in any **two** countries between 1939–1945

### 16: The Soviet Union and post-Soviet Russia (1924–2000)

This section examines the consolidation of the Soviet state from 1924 and the methods applied to ensure its survival, growth and expansion inside and outside the borders of the Soviet Union. It explores the rise and nature of the rule of Stalin, Khrushchev, Brezhnev and their policies. East–West relations post-1945 in relation to Soviet aims and leadership should also be considered. Finally, the decline and collapse of the Soviet Union should be considered, as well as political and economic developments in post-Soviet Russia.

- Soviet Union (1924–1941): Stalin and the struggle for power (1924–1929); defeat of Trotsky; Stalin's policies of collectivization and the Five-Year Plans; government and propaganda under Stalin; the purges and the Great Terror
- The impact of the Great Patriotic War (1941–1945); post-war Soviet Union (1945–1953): political and economic developments
- Khrushchev and Brezhnev: domestic policies and foreign relations
- Transformation of the Soviet Union (1985–1991): Gorbachev (aims, policies and extent of success); political developments and change
- Collapse of the Soviet Union; post-Soviet Russia to 2000; role and policies of Yeltsin; political and economic developments to 2000

### 17: Post-war western and northern Europe (1945–2000)

This section explores events in post-war western Europe and its recovery in the second half of the 20th century. In some cases the section examines the transition from authoritarian to democratic government. It requires examination of the social, political and economic issues facing states, and the methods used to cope with the challenges, either within individual states or in the move towards a system of European integration, in pursuit of mutually acceptable political, economic and foreign-policy goals.

- Breakdown of the wartime alliance; emergence of the Cold War and its impact on Germany; division of Germany
- Post-war problems and political and economic recovery in western Europe: devastation and debt; reconstruction of France and West Germany (1945–1963) and the impact of the Marshall Plan; role of Adenauer; the German “economic miracle”; role of de Gaulle; “Les Trente Glorieuses” in France
- West Germany (1963–1990): domestic policies; challenge of Baader Meinhof Group/Red Army Faction; reunification, role and policies of Kohl; social and cultural change in West Germany from 1949 to 1990
- Spain: Franco's regime and the transition to, and establishment of, democracy under Juan Carlos up to 1982; political, economic and social developments in Spain (1982–2000)
- Case study of political, social and economic changes in **one** western or northern European country (other than France, the Federal Republic of Germany and Spain) between 1945–2000

### 18: Post-war central and eastern Europe (1945–2000)

This section explores events in central and eastern Europe from 1945–2000. It includes the transition from wartime occupation to the dominance of the Soviet Union (with the exception of Tito's Yugoslavia). There is also a focus on the extent, and nature, of resistance to the dominance of the Soviet Union, as well as a discussion of the reasons for the collapse of the Soviet Empire. Finally, there is an examination of political, economic and social developments from 1989 to 2000.

- Soviet domination: motives, extent and nature of Soviet control in central and eastern Europe (1945–1955); politics, economies (COMECON) and the Warsaw Pact (1945–1955); Yugoslavia's challenge to Soviet control under Tito
- Support and cooperation, repression and protest (1945–1968): East Germany; Poland; Hungary; Czechoslovakia
- Acceptance of, and opposition to, Soviet control in central and eastern Europe (1968–1989): East Germany; Poland; Hungary and Czechoslovakia; Romania and Bulgaria; role of Walesa and Havel
- The collapse of Soviet control in central and eastern Europe; causes, developments and consequences
- Balkan conflicts in the 1990s: reasons for, and consequences of, the conflicts; role and policies of Milosevic
- Case study: the economic, social and political challenges of the post-communist era in any **one** central or eastern European country (1989–2000)

# Assessment in the Diploma Programme

## General

Assessment is an integral part of teaching and learning. The most important aims of assessment in the Diploma Programme (DP) are that it should support curricular goals and encourage appropriate student learning. Both external and internal assessments are used in the DP. IB examiners mark work produced for external assessment, while work produced for internal assessment is marked by teachers and externally moderated by the IB.

There are two types of assessment identified by the IB.

- Formative assessment informs both teaching and learning. It is concerned with providing accurate and helpful feedback to students and teachers on the kind of learning taking place, and the nature of students' strengths and weaknesses, in order to help develop students' understanding and capabilities. Formative assessment can also help to improve teaching quality, as it can provide information to monitor progress towards meeting the course aims and objectives.
- Summative assessment gives an overview of previous learning and is concerned with measuring student achievement.

The DP primarily focuses on summative assessment designed to record student achievement at, or towards the end of, the course of study. However, many of the assessment instruments can also be used formatively during the course of teaching and learning, and teachers are encouraged to do this. A comprehensive assessment plan is viewed as being integral with teaching, learning and course organization. For further information, see the IB *Programme standards and practices* document.

The approach to assessment used by the IB is criterion-related, not norm-referenced. This approach to assessment judges students' work by their performance in relation to identified levels of attainment, and not in relation to the work of other students. For further information on assessment within the DP, please refer to the publication *Diploma Programme assessment: Principles and practice*.

To support teachers in the planning, delivery and assessment of the DP courses, a variety of resources can be found on the online curriculum centre (OCC) or purchased from the IB store (store.ibo.org). Additional publications such as specimen papers and markschemes, teacher support materials, subject reports and grade descriptors can also be found on the OCC. Past examination papers as well as markschemes can be purchased from the IB store.

## Methods of assessment

The IB uses several methods to assess work produced by students.

### Assessment criteria

Assessment criteria are used when the assessment task is open-ended. Each criterion concentrates on a particular skill that students are expected to demonstrate. An assessment objective describes what students should be able to do, and assessment criteria describe how well they should be able to do it. Using assessment criteria allows discrimination between different answers and encourages a variety of responses.

Each criterion comprises a set of hierarchically ordered level descriptors. Each level descriptor is worth one or more marks. Each criterion is applied independently using a best-fit model. The maximum marks for each criterion may differ according to the criterion's importance. The marks awarded for each criterion are added together to give the total mark for the piece of work.

## Markbands

Markbands are a comprehensive statement of expected performance against which responses are judged. They represent a single holistic criterion divided into level descriptors. Each level descriptor corresponds to a range of marks to differentiate student performance. A best-fit approach is used to ascertain which particular mark to use from the possible range for each level descriptor.

## Markschemes

Markschemes are prepared for those examination questions that expect a particular kind of response and/or a given final answer from students. They give detailed instructions to examiners on how to break down the total mark for each question for different parts of the response.

## Marking notes

Marking notes are provided for some assessment components marked using assessment criteria. Marking notes give guidance on how to apply assessment criteria to the particular requirements of a question.

# Inclusive assessment arrangements

Inclusive assessment arrangements are available for candidates with assessment access requirements. These arrangements enable candidates with diverse needs to access the examinations and demonstrate their knowledge and understanding of the constructs being assessed.

The IB document *Candidates with assessment access requirements* provides details on all the inclusive assessment arrangements available to candidates with learning support requirements. The IB document *Learning diversity in the International Baccalaureate programmes: Special educational needs within the International Baccalaureate programmes* outlines the position of the IB with regard to candidates with diverse learning needs in the IB programmes. For candidates affected by adverse circumstances, the IB documents *General regulations: Diploma Programme* and the *Handbook of procedures for the Diploma Programme* provide details on access consideration.

The school is required to ensure that equal access arrangements and reasonable adjustments are provided to candidates with learning support requirements that are in line with the IB documents *Candidates with assessment access requirements* and *Learning diversity in the International Baccalaureate programmes: Special educational needs within the International Baccalaureate programmes*.

# Acknowledging the ideas or work of another person

Coordinators and teachers are reminded that candidates must acknowledge all sources used in work submitted for assessment. The following is intended as a clarification of this requirement.

DP candidates submit work for assessment in a variety of media that may include audio-visual material, text, graphs, images and/or data published in print or electronic sources. If a candidate uses the work or ideas of another person, the candidate must acknowledge the source using a standard style of referencing in a

consistent manner. A candidate's failure to acknowledge a source will be investigated by the IB as a potential breach of regulations that may result in a penalty imposed by the IB final award committee.

The IB does not prescribe which style(s) of referencing or in-text citation should be used by candidates; this is left to the discretion of appropriate faculty/staff in the candidate's school. The wide range of subjects, three response languages and the diversity of referencing styles make it impractical and restrictive to insist on particular styles. In practice, certain styles may prove most commonly used, but schools are free to choose a style that is appropriate for the subject concerned and the language in which candidates' work is written. Regardless of the reference style adopted by the school for a given subject, it is expected that the minimum information given includes: name of author, date of publication, title of source and page numbers, as applicable.

Candidates are expected to use a standard style and use it consistently so that credit is given to all sources used, including sources that have been paraphrased or summarized. When writing text, a candidate must clearly distinguish between their words and those of others by the use of quotation marks (or other method, such as indentation) followed by an appropriate citation that denotes an entry in the bibliography. If an electronic source is cited, the date of access must be indicated. Candidates are not expected to show faultless expertise in referencing, but are expected to demonstrate that all sources have been acknowledged. Candidates must be advised that for audio-visual material, text, graphs, images and/or data published in print or in electronic sources that is not their own, they must also attribute the source. Again, an appropriate style of referencing/citation must be used.

## Assessment outline—SL

## First assessment 2017

Assessment component	Weighting
<p><b>External assessment (2 hours 30 minutes)</b></p> <p><b>Paper 1 (1 hour)</b> Source-based paper based on the five prescribed subjects. Choose <b>one</b> prescribed subject from a choice of five. Answer four structured questions. (24 marks)</p> <p><b>Paper 2 (1 hour 30 minutes)</b> Essay paper based on the 12 world history topics. Answer two essay questions on two different topics. (30 marks)</p>	<p><b>75%</b></p> <p><b>30%</b></p> <p><b>45%</b></p>
<p><b>Internal assessment (20 hours)</b> This component is internally assessed by the teacher and externally moderated by the IB at the end of the course.</p> <p><b>Historical investigation</b> Students are required to complete a historical investigation into a topic of their choice. (25 marks)</p>	<p><b>25%</b></p>

# Assessment outline—HL

## First assessment 2017

Assessment component	Weighting
<p><b>External assessment (5 hours)</b></p> <p><b>Paper 1 (1 hour)</b> Source-based paper based on the five prescribed subjects. Choose <b>one</b> prescribed subject from a choice of five. Answer four structured questions. (24 marks)</p> <p><b>Paper 2 (1 hour 30 minutes)</b> Essay paper based on the 12 world history topics. Answer two essay questions on two different topics. (30 marks)</p> <p><b>Paper 3 (2 hours 30 minutes)</b> Separate papers for each of the four regional options. For the selected region, answer three essay questions. (45 marks)</p>	<p><b>80%</b></p> <p><b>20%</b></p> <p><b>25%</b></p> <p><b>35%</b></p>
<p><b>Internal assessment (20 hours)</b></p> <p>This component is internally assessed by the teacher and externally moderated by the IB at the end of the course.</p> <p><b>Historical investigation</b> Students are required to complete a historical investigation into a topic of their choice. (25 marks)</p>	<p><b>20%</b></p>

## External assessment

Two different methods are used to assess work produced by students.

- Markbands
- Detailed markschemes specific to each examination paper

The markbands for each component are published in this guide. The markbands are related to the assessment objectives established for the history course and the group 3 grade descriptors. The markschemes are specific to each examination.

## External assessment details

### Paper 1 (SL and HL)

**Duration:** 1 hour

**Weighting:** 30% SL, 20% HL

Paper 1 is a source-based examination paper based on the prescribed subjects. Each prescribed subject consists of two specified case studies, and in each examination session the paper will focus on **one** of the two case studies specified for each prescribed subject.

The paper will contain four sources for each prescribed subject. Sources will be primary or a mixture of primary and secondary, and may be written, pictorial or diagrammatic. The paper will consist of four questions for each prescribed subject, and students must answer all four questions from their chosen prescribed subject. Some questions will be answered using only evidence from one or more of the sources, as indicated. In other questions students will be asked to use their own knowledge of the prescribed subject as well as evidence contained in the sources.

First question, part A	This question will test understanding of one of the sources.	3 marks
First question, part B	This question will test understanding of one of the sources.	2 marks
Second question	This question will ask students to analyse the value and limitations of one of the sources. In their analysis of value and limitations, students should refer to the origin, purpose and content of the specified source.	4 marks
Third question	This question will ask students to compare and contrast what two of the sources reveal to a historian studying the particular aspect of the prescribed subject.	6 marks
Fourth question	This will be an evaluative question that asks students to draw on both the sources and their own knowledge in their evaluation.	9 marks

The maximum mark for this paper is 24. The paper is marked using a paper-specific markscheme, except for the final question for each prescribed subject, which is marked using the generic markbands that follow, in addition to a paper-specific markscheme.



**External markbands—paper 1 (fourth question) (SL and HL)**

Marks	Level descriptor
0	The response does not reach a standard described by the descriptors below.
1–3	The response lacks focus on the question.  References to the sources are made, but at this level these references are likely to consist of descriptions of the content of the sources rather than the sources being used as evidence to support the analysis.  No own knowledge is demonstrated or, where it is demonstrated, it is inaccurate or irrelevant.
4–6	The response is generally focused on the question.  References are made to the sources, and these references are used as evidence to support the analysis.  Where own knowledge is demonstrated, this lacks relevance or accuracy. There is little or no attempt to synthesize own knowledge and source material.
7–9	The response is focused on the question.  Clear references are made to the sources, and these references are used effectively as evidence to support the analysis.  Accurate and relevant own knowledge is demonstrated. There is effective synthesis of own knowledge and source material.

**Paper 2 (SL and HL)****Duration: 1 hour 30 minutes****Weighting: 45% SL, 25% HL**

Paper 2 is an essay paper based on the 12 world history topics.

The paper consists of two questions for each of the 12 topics. Students must answer **two** questions, each selected from a **different** topic. Some comparative questions on this paper require that examples be drawn from more than one region. When the word “region” is used in a paper 2 question, it refers to one of the four regional options defined by the world map in the introduction to the world history topics in the “World history topics” section.

The maximum mark for this paper is 30. The paper is marked using generic markbands and a paper-specific markscheme.

**Paper 3 (HL only)****Duration: 2 hours 30 minutes****Weighting: 35%**

Each of the four HL regional options has a separate examination paper. Students are registered for one of these papers.

The paper 3 examination paper for each regional option will consist of 36 questions, consisting of two essay questions on each of the 18 sections specified for the regional option. Students must answer any **three** questions. Questions that refer to specific countries, events or people are restricted to those listed in the syllabus descriptions. The maximum mark for this paper is 45. The paper is marked using generic markbands and a paper-specific markscheme.

**External markbands—paper 2 (SL and HL)**

Marks	Level descriptor
0	Answers do not reach a standard described by the descriptors below.
1–3	<p>There is little understanding of the demands of the question. The response is poorly structured or, where there is a recognizable essay structure, there is minimal focus on the task.</p> <p>Little knowledge of the world history topic is present.</p> <p>The student identifies examples to discuss, but these examples are factually incorrect, irrelevant or vague.</p> <p>The response contains little or no critical analysis. The response may consist mostly of generalizations and poorly substantiated assertions.</p>
4–6	<p>The response indicates some understanding of the demands of the question. While there may be an attempt to follow a structured approach, the response lacks clarity and coherence.</p> <p>Knowledge of the world history topic is demonstrated, but lacks accuracy and relevance. There is a superficial understanding of historical context.</p> <p>The student identifies specific examples to discuss, but these examples are vague or lack relevance.</p> <p>There is some limited analysis, but the response is primarily narrative/descriptive in nature rather than analytical.</p>
7–9	<p>The response indicates an understanding of the demands of the question, but these demands are only partially addressed. There is an attempt to follow a structured approach.</p> <p>Knowledge of the world history topic is mostly accurate and relevant. Events are generally placed in their historical context.</p> <p>The examples that the student chooses to discuss are appropriate and relevant. The response makes links and/or comparisons (as appropriate to the question).</p> <p>The response moves beyond description to include some analysis or critical commentary, but this is not sustained.</p>

Marks	Level descriptor
10–12	<p>The demands of the question are understood and addressed. Responses are generally well structured and organized, although there is some repetition or lack of clarity in places.</p> <p>Knowledge of the world history topic is mostly accurate and relevant. Events are placed in their historical context, and there is some understanding of historical concepts.</p> <p>The examples that the student chooses to discuss are appropriate and relevant, and are used to support the analysis/evaluation. The response makes effective links and/or comparisons (as appropriate to the question).</p> <p>The response contains critical analysis, which is mainly clear and coherent. There is some awareness and evaluation of different perspectives. Most of the main points are substantiated and the response argues to a consistent conclusion.</p>
13–15	<p>Responses are clearly focused, showing a high degree of awareness of the demands and implications of the question. Responses are well structured and effectively organized.</p> <p>Knowledge of the world history topic is accurate and relevant. Events are placed in their historical context, and there is a clear understanding of historical concepts.</p> <p>The examples that the student chooses to discuss are appropriate and relevant, and are used effectively to support the analysis/evaluation. The response makes effective links and/or comparisons (as appropriate to the question).</p> <p>The response contains clear and coherent critical analysis. There is evaluation of different perspectives, and this evaluation is integrated effectively into the answer. All, or nearly all, of the main points are substantiated, and the response argues to a consistent conclusion.</p>

**External markbands—paper 3 (HL)**

Marks	Level descriptor
0	Response does not reach a standard described by the descriptors below.
1–3	<p>There is little understanding of the demands of the question. The response is poorly structured or, where there is a recognizable essay structure, there is minimal focus on the task.</p> <p>Little knowledge is present. Where specific examples are referred to, they are factually incorrect, irrelevant or vague.</p> <p>The response contains little or no critical analysis. It may consist mostly of generalizations and poorly substantiated assertions.</p>
4–6	<p>The response indicates some understanding of the demands of the question. While there may be an attempt to follow a structured approach, the response lacks clarity and coherence.</p> <p>Knowledge is demonstrated but lacks accuracy and relevance. There is a superficial understanding of historical context. The answer makes use of specific examples, although these may be vague or lack relevance.</p> <p>There is some limited analysis, but the response is primarily narrative/descriptive in nature, rather than analytical.</p>
7–9	<p>The response indicates an understanding of the demands of the question, but these demands are only partially addressed. There is an attempt to follow a structured approach.</p> <p>Knowledge is mostly accurate and relevant. Events are generally placed in their historical context. Examples used are appropriate and relevant.</p> <p>The response moves beyond description to include some analysis or critical commentary, but this is not sustained.</p>
10–12	<p>The demands of the question are understood and addressed. Answers are generally well structured and organized, although there may be some repetition or lack of clarity in places.</p> <p>Knowledge is accurate and relevant. Events are placed in their historical context, and there is a clear understanding of historical concepts. Examples used are appropriate and relevant, and are used to support the analysis/evaluation.</p> <p>Arguments are mainly clear and coherent. There is some awareness and evaluation of different perspectives.</p> <p>The response contains critical analysis. Most of the main points are substantiated, and the response argues to a consistent conclusion.</p>

Marks	Level descriptor
13–15	<p>Responses are clearly focused, showing a high degree of awareness of the demands and implications of the question. Answers are well structured, balanced and effectively organized.</p> <p>Knowledge is detailed, accurate and relevant. Events are placed in their historical context, and there is a clear understanding of historical concepts. Examples used are appropriate and relevant, and are used effectively to support the analysis/evaluation.</p> <p>Arguments are clear and coherent. There is evaluation of different perspectives, and this evaluation is integrated effectively into the answer.</p> <p>The answer contains well-developed critical analysis. All, or nearly all, of the main points are substantiated, and the response argues to a reasoned conclusion.</p>

# Internal assessment

## Purpose of internal assessment

Internal assessment is an integral part of the course and is compulsory for both SL and HL students. It enables students to demonstrate the application of skills and knowledge, and to pursue their personal interests, without the time limitations and other constraints that are associated with written examinations. The internal assessment should, as far as possible, be woven into normal classroom teaching and not be a separate activity conducted after a course has been taught.

The internal assessment requirements at SL and at HL for history are the same. All students complete a historical investigation into a historical topic of their choice. The internal assessment allows flexibility for students to select a topic of personal interest. The topic need not be related to the syllabus and students should be encouraged to use their own initiative when deciding on a topic. The free choice of topic means that the historical investigation provides a particularly good opportunity for students to engage with topics that are of personal interest, or topics related to their own local or national history.

Please note: Each individual student must complete an individual historical investigation—group work may not be undertaken.

## Time allocation

Internal assessment contributes 25% to the final assessment in the SL course and 20% in the HL course. This weighting should be reflected in the time that is allocated to teaching the skills and understanding required to undertake the work, as well as the total time allocated to carry out the work.

It is recommended that a total of approximately 20 hours (SL and HL) of teaching time should be allocated to the work. This should include:

- time for the teacher to explain to students the requirements of the internal assessment
- class time for students to work on the internal assessment component and ask questions
- time for consultation between the teacher and each student individually
- time to review and monitor progress, and to check authenticity.

## Guidance and authenticity

The historical investigation submitted for internal assessment must be the student's own work. However, it is not the intention that students should decide upon a title or topic and be left to work on the internal assessment component without any further support from the teacher. The teacher should play an important role during both the planning stage and the period when the student is working on the internally assessed work. It is the responsibility of the teacher to ensure that students are familiar with:

- the requirements of the type of work to be internally assessed
- the assessment criteria; students must understand that the work submitted for assessment must address these criteria effectively.

Teachers and students must discuss the internally assessed work. Students should be encouraged to initiate discussions with the teacher to obtain advice and information, and students must not be penalized for seeking guidance. As part of the learning process, teachers should read and give advice to students on **one draft** of the work. The teacher should provide oral or written advice on how the work could be improved, but should not edit the draft. The next version handed to the teacher must be the final version for submission.

It is the responsibility of teachers to ensure that all students understand the basic meaning and significance of concepts that relate to academic honesty, especially authenticity and intellectual property. Teachers must ensure that all student work for assessment is prepared according to the requirements and must explain clearly to students that the internally assessed work must be entirely their own. All work submitted to the IB for moderation or assessment must be authenticated by a teacher, and must not include any known instances of suspected or confirmed academic misconduct. Each student must confirm that the work is his or her authentic work and constitutes the final version of that work. Once a student has officially submitted the final version of the work it cannot be retracted. The requirement to confirm the authenticity of work applies to the work of all students, not just the sample work that will be submitted to the IB for the purpose of moderation. For further details, refer to the IB publication *Academic honesty in the IB educational context, The Diploma Programme: From principles into practice* and the relevant articles in *General regulations: Diploma Programme*.

Authenticity may be checked by discussion with the student on the content of the work, and scrutiny of one or more of the following.

- The student's initial proposal
- The first draft of the written work
- The references cited
- The style of writing compared with work known to be that of the student
- The analysis of the work by a web-based plagiarism-detection service

Please note: The same piece of work cannot be submitted to meet the requirements of both the internal assessment and the extended essay.

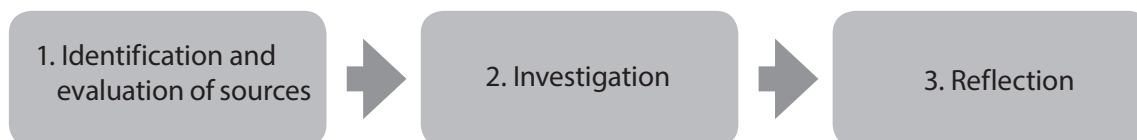
## Internal assessment details—SL and HL

### Historical investigation

**Duration:** 20 hours

**Weighting:** 25% SL, 20% HL

Students at both SL and HL are required to complete a historical investigation into **a topic of their choice**. The historical investigation is made up of three sections.



**Figure 8**  
*Historical investigation*

Students have a free choice of topic for their historical investigation—the topic need not be related to the syllabus, and students should be encouraged to use their own initiative when deciding on a topic. However, the topic must be historical, and therefore **cannot be on an event that has happened in the last 10 years**.

Students should choose their own topic, with their teacher’s guidance and approval. Teachers must approve the topic and question for investigation before work is started. It is crucial that there are sufficient sources to support the investigation, and that the investigation can be assessed by the criteria for internal assessment. Teachers must also make students aware of any relevant ethical considerations when undertaking their investigation, for example, the need to show sensitivity or to respect confidentiality.

The investigation is an opportunity for students to demonstrate the application of their skills and knowledge to a historical topic of their choice. The emphasis must be on a specific historical inquiry that enables the student to develop and apply the skills of a historian by selecting and analysing a range of source material and considering diverse perspectives. The activity demands that students search for, select, evaluate and use evidence to reach a relevant conclusion consistent with the evidence and arguments that have been put forward.

#### Section 1: Identification and evaluation of sources

This section requires students to analyse in detail **two** of the sources that they will use in their investigation. The sources can be either primary or secondary sources. In this section students must:

- clearly state the question they have chosen to investigate (this must be stated as a question)
- include a brief explanation of the nature of the two sources they have selected for detailed analysis, including an explanation of their relevance to the investigation
- analyse two sources in detail. With reference to the origins, purpose and content, the student should analyse the value and limitations of the two sources in relation to the investigation.

A crucial element of this section of the internal assessment task is formulating an appropriate question to investigate. The six key concepts for the history course (causation, consequence, continuity, change, significance and perspectives) can be a very useful starting point in helping students to formulate a question.



The following are examples of historical investigations recently submitted by students.

- How systematic were the deportations of the Jewish population of Dusseldorf to Minsk between 1941 and 1942?
- How significant were economic problems as a cause of the Bamberg Witch Trials (1623–1633)?
- What were the most important reasons for the failure of Operation Market Garden?
- To what extent was weak leadership responsible for the collapse of the Egyptian Old Kingdom in 2125 BC?

## Section 2: Investigation

This section of the internal assessment task consists of the actual investigation. The internal assessment task provides scope for a wide variety of different types of historical investigation, for example:

- a historical topic or theme using a variety of written sources or a variety of written and non-written sources
- a historical topic based on fieldwork, for example, a museum, archeological site, battlefields, places of worship such as mosques or churches, historic buildings
- a local history study.

The investigation must be clearly and effectively organized. While there is no prescribed format for how this section must be structured, it must contain critical analysis that is focused clearly on the question being investigated, and must also include the conclusion that the student draws from their analysis.

In this section, students must use a range of evidence to support their argument. Please note that students can use primary sources, secondary sources, or a mixture of the two.

## Section 3: Reflection

This section of the internal assessment task requires students to reflect on what undertaking their investigation highlighted to them about the methods used by, and the challenges facing, the historian.

Examples of discussion questions that may help to encourage reflection include the following.

- What methods used by historians did you use in your investigation?
- What did your investigation highlight to you about the limitations of those methods?
- What are the challenges facing the historian? How do they differ from the challenges facing a scientist or a mathematician?
- What challenges in particular does archive-based history present?
- How can the reliability of sources be evaluated?
- What is the difference between bias and selection?
- What constitutes a historical event?
- Who decides which events are historically significant?
- Is it possible to describe historical events in an unbiased way?
- What is the role of the historian?
- Should terms such as “atrocious” be used when writing about history, or should value judgments be avoided?
- If it is difficult to establish proof in history, does that mean that all versions are equally acceptable?

### Bibliography

A bibliography and clear referencing of all sources **must** be included with every investigation, but these are not included in the overall word count.

### Word limit

The word limit for the historical investigation is 2,200 words. A bibliography and clear referencing of all sources **must** be included in the investigation, but are not included in the overall word count.

Below are suggested word allocations for each section of the historical investigation. Please note that these word allocations are suggestions only.

Section	Suggested word allocation	Associated assessment criteria	Marks
1. Identification and evaluation of sources	500	A. Identification and evaluation of sources	6 marks
2. Investigation	1,300	B. Investigation	15 marks
3. Reflection	400	C. Reflection	4 marks
Bibliography	Not applicable	Not applicable	Not applicable
<b>Total (maximum word limit)</b>	<b>2,200 words</b>		<b>Total: 25 marks</b>

### Further guidance

Additional guidance on the internal assessment task can be found in the *History teacher support material*.

## Using assessment criteria for internal assessment

A number of assessment criteria have been identified for the internal assessment task. Each assessment criterion has level descriptors describing specific achievement levels, together with an appropriate range of marks. The level descriptors concentrate on positive achievement, although for the lower levels failure to achieve may be included in the description.

Teachers must judge the internally assessed work at SL and at HL against the criteria using the level descriptors.

- The same assessment criteria are provided for SL and HL.
- The aim is to find, for each criterion, the descriptor that conveys most accurately the level attained by the student, using the best-fit model. A best-fit approach means that compensation should be made when a piece of work matches different aspects of a criterion at different levels. The mark awarded should be one that most fairly reflects the balance of achievement against the criterion. It is not necessary for every single aspect of a level descriptor to be met for that mark to be awarded.
- When assessing a student's work, teachers should read the level descriptors for each criterion until they reach a descriptor that most appropriately describes the level of the work being assessed. If a piece of work seems to fall between two descriptors, both descriptors should be read again and the one that more appropriately describes the student's work should be chosen.
- Where there are two or more marks available within a level, teachers should award the upper marks if the student's work demonstrates the qualities described to a great extent; the work may be close to achieving marks in the level above. Teachers should award the lower marks if the student's work demonstrates the qualities described to a lesser extent; the work may be close to achieving marks in the level below.
- Only whole numbers should be recorded; partial marks (fractions and decimals) are not acceptable.
- Teachers should not think in terms of a pass or fail boundary, but should concentrate on identifying the appropriate descriptor for each assessment criterion.
- The highest level descriptors do not imply faultless performance but should be achievable by a student. Teachers should not hesitate to use the extremes if they are appropriate descriptions of the work being assessed.
- A student who attains a high achievement level in relation to one criterion will not necessarily attain high achievement levels in relation to the other criteria. Similarly, a student who attains a low achievement level for one criterion will not necessarily attain low achievement levels for the other criteria. Teachers should not assume that the overall assessment of the students will produce any particular distribution of marks.
- It is recommended that the assessment criteria be made available to students.

## Internal assessment criteria—SL and HL

The historical investigation for both SL and HL is assessed against three criteria.

- Criterion A: Identification and evaluation of sources (6 marks)
- Criterion B: Investigation (15 marks)
- Criterion C: Reflection (4 marks)

### Internal assessment criteria (SL and HL)

#### Criterion A: Identification and evaluation of sources (6 marks)

Marks	Level descriptor
0	The work does not reach a standard described by the descriptors below.
1–2	The question for investigation has been stated. The student has identified and selected appropriate sources, but there is little or no explanation of the relevance of the sources to the investigation. The response describes, but does not analyse or evaluate, two of the sources.
3–4	An appropriate question for investigation has been stated. The student has identified and selected appropriate sources, and there is some explanation of the relevance of the sources to the investigation. There is some analysis and evaluation of two sources, but reference to their value and limitations is limited.
5–6	An appropriate question for investigation has been clearly stated. The student has identified and selected appropriate and relevant sources, and there is a clear explanation of the relevance of the sources to the investigation. There is a detailed analysis and evaluation of two sources with explicit discussion of the value and limitations of two of the sources for the investigation, with reference to the origins, purpose and content of the two sources.

**Criterion B: Investigation (15 marks)**

Marks	Level descriptor
0	The work does not reach a standard described by the descriptors below.
1–3	<p>The investigation lacks clarity and coherence, and is poorly organized. Where there is a recognizable structure there is minimal focus on the task.</p> <p>The response contains little or no critical analysis. It may consist mostly of generalizations and poorly substantiated assertions. Reference is made to evidence from sources, but there is no analysis of that evidence.</p>
4–6	<p>There is an attempt to organize the investigation but this is only partially successful, and the investigation lacks clarity and coherence.</p> <p>The investigation contains some limited critical analysis but the response is primarily narrative/descriptive in nature, rather than analytical. Evidence from sources is included, but is not integrated into the analysis/argument.</p>
7–9	<p>The investigation is generally clear and well organized, but there is some repetition or lack of clarity in places.</p> <p>The response moves beyond description to include some analysis or critical commentary, but this is not sustained. There is an attempt to integrate evidence from sources with the analysis/argument.</p> <p>There may be awareness of different perspectives, but these perspectives are not evaluated.</p>
10–12	<p>The investigation is generally clear and well organized, although there may be some repetition or lack of clarity in places.</p> <p>The investigation contains critical analysis, although this analysis may lack development or clarity. Evidence from a range of sources is used to support the argument.</p> <p>There is awareness and some evaluation of different perspectives. The investigation argues to a reasoned conclusion.</p>
13–15	<p>The investigation is clear, coherent and effectively organized.</p> <p>The investigation contains well-developed critical analysis that is focused clearly on the stated question. Evidence from a range of sources is used effectively to support the argument.</p> <p>There is evaluation of different perspectives. The investigation argues to a reasoned conclusion that is consistent with the evidence and arguments provided.</p>

**Criterion C: Reflection (4 marks)**

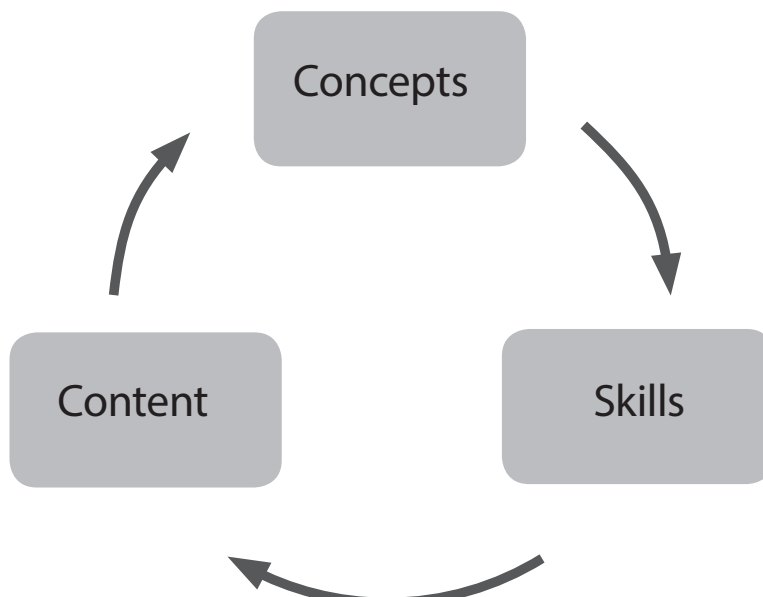
Marks	Level descriptor
0	The work does not reach a standard described by the descriptors below.
1–2	<p>The reflection contains some discussion of what the investigation highlighted to the student about the methods used by the historian.</p> <p>The reflection demonstrates little awareness of the challenges facing the historian and/or the limitations of the methods used by the historian.</p> <p>The connection between the reflection and the rest of the investigation is implied, but is not explicit.</p>
3–4	<p>The reflection is clearly focused on what the investigation highlighted to the student about the methods used by the historian</p> <p>The reflection demonstrates clear awareness of challenges facing the historian and/or limitations of the methods used by the historian.</p> <p>There is a clear and explicit connection between the reflection and the rest of the investigation.</p>

## Approaches to teaching and learning in the Diploma Programme history course

Approaches to teaching and learning in the Diploma Programme (DP) refer to deliberate strategies, skills and attitudes that permeate the teaching and learning environment. These approaches and tools are intrinsically linked with the learner profile attributes, enhance student learning and assist student preparation for the DP assessment and beyond.

The five approaches to learning (developing thinking skills, social skills, communication skills, self-management skills and research skills) along with the six approaches to teaching (teaching that is inquiry-based, conceptually focused, contextualized, collaborative, differentiated and informed by assessment) encompass the key values and principles that underpin IB pedagogy. More advice and support on these approaches to teaching and learning can be found in the following pages of this subject guide and also in the *History teacher support material*.

The DP history course is based on three key elements: content, concepts and skills. These three elements are seen as being inextricably linked.



**Figure 9**  
*Three key elements*

“Three-dimensional” models, such as this, “value a solid base of critical factual knowledge across the disciplines, but they raise the bar for curriculum and instruction by shifting the design focus to the conceptual level of understanding” (Erickson 2012).

<b>Concepts</b>	Concepts are big powerful ideas that have relevance both within and across subject areas. Concepts help to move students from knowledge to understanding as “knowledge is integrated with existing schemas and cognitive frameworks” (Anderson and Krathwohl 2001). Concepts also help to provide bridges between old knowledge and new knowledge, and facilitate transfer of knowledge across subject areas/contexts. Understanding the “big ideas” behind a topic can also help students get to the heart of why they are learning a particular topic. (See, for example, Perkins 2010.)
<b>Content</b>	Content also plays a crucial role in the DP history course, as there needs to be a solid base of factual knowledge to underpin the development of conceptual understanding. Specific examples and case studies also help to ground abstract concepts, allowing students to see a concept represented in a particular context.
<b>Skills</b>	Throughout the DP history course, students should be encouraged to develop their understanding of the methodology and practice of the discipline of history. Teaching historical skills enriches the student’s understanding of the subject and encourages the student to apply them to the future study of history or related areas. It is essential that these skills are covered throughout the syllabus, are introduced appropriately, depending on the context, and are not treated in isolation.

## Key concepts for DP history unpacked

The DP history course is focused on six key concepts: causation, consequence, change, continuity, significance and perspectives. In their efforts to place thinking at the centre of historical understanding, researchers in history education have highlighted the role that concepts such as these play in helping to shape our thinking about history (Seixas and Morton 2013). These concepts help students to think critically about historical issues; helping students to identify and solve problems, make decisions, and form judgments about past claims, actors and issues. These concepts are also extremely useful to history teachers as a tool for helping to craft creative lessons and assessment activities that avoid passive content delivery, and that provide opportunities for students to build on their prior knowledge and to think deeply about historical issues and events.

<b>Change</b>	The study of history involves investigation of the extent to which people and events bring about change. Discussion of the concept of change can encourage sophisticated discussions such as encouraging students to think about, and look for, change where some claim none exists, or using evidence to challenge orthodox theories and assumptions about people and events that it is claimed led to significant change. Students’ questions and judgments about historical change should be based on deep understanding of content and on comparison of the situation before and after the events under examination.
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<b>Continuity</b>	While historical study often focuses on moments of significant change, students should also be aware that some change is slow, and that throughout history there is also significant continuity. Students can demonstrate deep historical knowledge and understanding by, for example, showing awareness that there are times when there has been considerable continuity in the midst of great historical change. Alternatively, students may question and assess whether a change in political leadership, for example, brought about a change in foreign policy, or whether it was more accurately mirroring policies of previous governments.
<b>Causation</b>	Effective historical thinkers recognize that many claims made about the past seek to more thoroughly explain and understand how a certain set of circumstances originated. Deep historical understanding is demonstrated where students recognize that most historical events are caused by an interplay of diverse and multiple causes that require students to make evidence-based judgments about which causes were more important or significant, or which causes were within the scope of individuals to direct and which were not.
<b>Consequence</b>	History is the understanding of how forces in the past have shaped future people and societies. Students demonstrate competency as historical thinkers where they understand and can explain how significant events and people have had both short-term and long-lasting effects. Students use evidence and interpretations of those people and events to make comparisons between different points in time, and to make judgments about the extent to which those forces produced long-lasting and important consequences.
<b>Significance</b>	History is not simply the record of all events that have happened in the past. Instead, history is the record that has been preserved through evidence or traces of the past, and/or the aspects that someone has consciously decided to record and communicate. Students should be encouraged to ask questions about why something may have been recorded or included in a historical narrative. Similarly, they should be encouraged to think about who or what has been excluded from historical narratives, and for what reasons. Additionally, students' questions should encourage them to think about, and assess, the relative importance of events, people, groups or developments, and whether the evidence supports the claims that others make about their significance.
<b>Perspectives</b>	IB students should be aware of how history is sometimes used or abused to retell and promote a grand narrative of history, a narrowly focused national mythology that ignores other perspectives, or to elevate a single perspective to a position of predominance. Students are encouraged to challenge and critique multiple perspectives of the past, and to compare them and corroborate them with historical evidence. Students should recognize that for every event recorded in the past, there may be multiple contrasting or differing perspectives. Using primary-source accounts and historians' interpretations, students may also investigate and compare how people, including specific groups such as minorities or women, may have experienced events differently in the past. In this way there are particularly strong links between exploring multiple perspectives and the development of international-mindedness.

## Skills

The DP history course, as with all DP courses, provides rich opportunities to develop students' thinking, research, communication, social and self-management skills. More advice on developing these five categories of skills in the history course can be found in the *History teacher support material*. Four examples of the types of skills developed throughout the history course are outlined below.

<p><b>Example 1: The gathering and sorting of historical evidence</b></p> <p>Many of the skills developed in the history course relate to the gathering and sorting of historical evidence. This area includes research skills such as locating and selecting relevant and appropriate evidence from books, articles, websites and audio-visual resources; and recognizing the distinctions between different kinds of evidence. The course provides the opportunity for students to increase their confidence and independence in locating and using a variety of historical sources.</p>	<p><b>Example 2: The evaluation of historical evidence</b></p> <p>A key element of the course relates to the development of thinking and research skills relating to the evaluation of historical evidence. These skills include recognizing the subjective nature of the historical evidence; examining sources for information and interpretations, and for cases where they corroborate, complement or contradict each other; recognizing the value and uses of sources, and reasons to use them cautiously; and recognizing and appreciating why and how opinions and interpretations differ. The course provides the opportunity for students to increase their awareness of multiple perspectives, historical opinions and interpretations.</p>
<p><b>Example 3: Recognizing and understanding historical processes and their relationships to human experience, activity and motivation</b></p> <p>The history course allows students to develop their appreciation of the nature of human experience in a range of contexts. It achieves this through a focus on skills such as recognizing, explaining and analysing causes and consequences; recognizing, explaining and analysing continuity, change and development over time; recognizing, explaining and analysing similarity and difference; relating human activities, experiences and motivations in history to a range of cultural and social dimensions; and synthesizing material studied across time and space.</p>	<p><b>Example 4: Organizing and expressing historical ideas and information</b></p> <p>The history course places a strong emphasis on developing the communication skills needed to organize and express ideas and information with clarity. These skills include: posing questions and hypotheses, and answering or testing them; handling and synthesizing several sources for one inquiry; selecting and deploying information and ideas; constructing narratives, with ideas, analysis and relevant substantiation; and summarizing and arriving at conclusions. The development of these skills helps increase students' confidence and sophistication in both oral and written communication.</p>

## Glossary of command terms

### Command terms for history

Students should be familiar with the following key terms and phrases used in examination questions, which are to be understood as described below. Although these terms will be used frequently in examination questions, other terms may be used to direct students to present an argument in a specific way.

<b>Command term</b>	<b>Assessment objective level</b>	<b>Definition</b>
<b>Analyse</b>	AO2	Break down in order to bring out the essential elements or structure.
<b>Compare</b>	AO3	Give an account of the similarities between two (or more) items or situations, referring to both (all) of them throughout.
<b>Compare and contrast</b>	AO3	Give an account of similarities and differences between two (or more) items or situations, referring to both (all) of them throughout.
<b>Contrast</b>	AO3	Give an account of the differences between two (or more) items or situations, referring to both (all) of them throughout.
<b>Discuss</b>	AO3	Offer a considered and balanced review that includes a range of arguments, factors or hypotheses. Opinions or conclusions should be presented clearly and supported by appropriate evidence.
<b>Evaluate</b>	AO3	Make an appraisal by weighing up the strengths and limitations.
<b>Examine</b>	AO3	Consider an argument or concept in a way that uncovers the assumptions and interrelationships of the issue.
<b>To what extent</b>	AO3	Consider the merits or otherwise of an argument or concept. Opinions and conclusions should be presented clearly and supported with appropriate evidence and sound argument.

# Bibliography

This bibliography lists the works referenced in this guide and some of the principal works used to inform the curriculum review. It is not an exhaustive list of resources and is **not** a list of recommended textbooks.

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