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Recharting ‘informal empire’: Liverpool, Shanghai, and the Blue Funnel Line, 1865–1914

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ABSTRACT

Concepts of “informal empire” and the “imperialism of free trade”, and their relationship to urbanization, are reconsidered in port-and-maritime contexts for the later-nineteenth and early-twentieth centuries. Blending Imperial-cum-Global History and Urban Geography, the relationship between the maritime cosmopolises of Liverpool and Shanghai through the Blue Funnel Line is spotlighted. Merseyside-based and pioneering steamship services between Britain and China, by the 1900s Blue Funnel constituted eastern Asia’s premiere international cargo-carrier. Archive-rich, the analysis demonstrates how Blue Funnel accompanied Britain’s informal empire on China’s urban seaboard from the company’s inception and formative voyages to Shanghai (1865–1866) to World War One. The imperialism of urbanization, via ocean-going exchange, was not omniscient, however. In China’s shifting domestic and international politico-economic environments, limitations in the “semi-colonial” framework and the uneven geography of imperial influence from littoral to mainland are addressed. Meantime, Blue Funnel faced interurban competition within the UK and contestation between industrial and financial interests. Linked by transoceanic shipping, highly urbanized port-city Shanghai was not necessarily a secure harbor for equally urbanized port-city Liverpool. Urban geographers are invited, therefore, to consider a longer *durée* of port-city transformation wrought by multinationals overseas as well as checks on quasi-imperial maritime enterprise.

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Introduction: informal empire, urbanization and the sea

Suggesting a harmonious global capitalism, iconic port-cities Liverpool and Shanghai are twinned today (Williams, 2023), with transoceanic linkages reignited by a new container shipping service post-April 2021 (Peel Ports, 2021). The splendid arch at the entrance of Liverpool’s Chinatown, meanwhile, celebrates ongoing interconnections. Further down Nelson Street is a blue plaque at the site (1950–1969) of the Blue Funnel Line’s recruitment office for Chinese seafarers. Memorialized is Liverpool’s historic centrality in trade with China, particularly through Blue Funnel (officially the Ocean Steam Ship Company

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[OSSCo]) formerly Merseyside's premiere shipping line and predominant UK cargo carrier for eastern Asia. Simultaneously, however, the plaque acknowledges a racialized labor regime and the shameful forced repatriation of 2000 Chinese seafarers in the aftermath of World War Two wherein Blue Funnel was complicit (Chen, 2013; Wetherell, 2025, pp. 10, 13, 25, 29–32). Beneath cozy outward appearances, therefore, the experiences of Shanghainese mariners reveal “unequal power geometries and relations that shaped colonial maritime spaces” (Featherstone, 2022, p. 238).

Highly urbanized, treaty-port China – Shanghai center stage – was exemplar of Britain's nineteenth-century “informal empire” or “imperialism of free trade”; concepts associated with Jack Gallagher (1919–1980) and Ronald Robinson (1920–1999). The former grew up in Birkenhead where Blue Funnel's “China Boats” loaded, constituting “few better places to stimulate the imagination on the causes of Britain's rise to world power” (Darwin, 2008, p. 57). China avoided formal colonization. For Gallagher and Robinson, however, the global reach of Victorian industrial capitalism encompassed China losing economic sovereignty on its urbanized seaboard. Focusing on “colonies coloured red on the map”, therefore, was “like judging the size and character of icebergs solely from the parts above the water-line” (1953, p. 1). “Informal empire” was repurposed by Cain and Hopkins (1993) in their “gentlemanly capitalism” paradigm. “Gentlemanly imperialism” was the expansionist outgrowth of fused aristocratic and financial power, concentrated on the City of London. Britain's service sector dominance of the Celestial Empire's external economy ensured UK informal suzerainty both revived and extended in late-nineteenth-century China (Petersson, 2002, pp. 103, 117). Cultural turn notwithstanding, informal empire remains a hardy academic perennial. Through Joseph Conrad's fictional lens, Jasanoff (2017) rediscovered “informal imperialism” in Latin America. “Material interests”, in the ex-seafarer's *Nostromo* (1904), ensured “imperialism continue[d] to thrive whether ... it had the word ‘empire’ attached to it” (pp. 283, 364). Aptly subtitled *A Tale of the Seaboard*, Conrad's masterpiece is cited in Attard's reappraisal of informal empire (2023, pp. 1223–1224), proclaiming Gallagher and Robinson “as influential as they have ever been” (p. 1220). Certainly, in Geography's oceanic turn, A. Davies (2022) identifies the “reality of imperialism” as more than “a formal political process” (p. 58).

Maritime-focussed, and bridging industry- and finance-led models, the first section of this article explores how OSSCo (from conception in 1865 to World War One) interwove with informal empire. Counterbalancing terra-centric tendencies, the analysis demonstrates how transoceanic linkages and port infrastructures transformed Shanghai's urban landscape. The second part of the article, however, provides a new critique, a recharting of informal empire exploring ebbs and flows in Liverpool's and Blue Funnel's influence in Shanghai conditioned by the vagaries of China's economic development, political uncertainties (local and transnational), and UK-based interurban competition. This reframing and respatializing from a port-and-maritime perspective draws upon existing historiography blended with surviving archival sources: principally, the in-camera reports of OSSCo annual meetings and the diaries of Richard Durning Holt (OSSCo management trainee, 1892–1893, Manager [equivalent to an executive director in a public-limited company] after 1895, and Senior Partner [chief executive] from 1904). M. B. Miller (2012) dipped into the extensive and under-utilized Ocean Archive in a global study of the organization of European-dominated maritime trade, while Goldsmith (2017) drew deeply upon Holt's journals to reconstruct the changing nature of

superrich Liverpool family businesses. Neither, however, were primarily concerned with interrogating these archives for the novel insights presented here on “informal empire” from a seaborne vantage.

Within Urban Geography, rethinking port cities in relational- and spatially-expansive modes recognizes both “mutual constitution or co-evolution” of cities, in a “constant state of flux”, and “persistent [intra- and inter-urban] inequalities” (McFarlane & Rutherford, 2008, pp. 364–365). An infrastructural turn, meantime, has identified spatial inequalities, exclusions and displacements in globalized logistics-chains (Chua, 2021; 2023; Cowen, 2014; LaDuke & Cowen, 2020). That literature has focused on port development post-containerization, and urban geographers will benefit from this article’s historicized approach and longer trajectory stressing both constrictions by, and constraints on, quasi-colonial maritime power. Paralleling Glasgow-Bombay, the imperial terms-of-trade were in the British port’s favor in Liverpool-Shanghai interactions (Hazareesingh, 2009). Akin to early-twentieth-century seaborne exchanges between Durban and Southampton, however, local circumstances determined “[c]losures, coercion and limitations, as much as openings” (Hyslop, 2017, p. 173).

Informal empire and imperial shipping

Propelling China’s urbanization (Bracken, 2019), treaty-ports were “physical manifestation of informal empire” per the “opening” of Japan after 1854 (Phipps, 2015, pp. 3–4). Fixated on railways and mines, however, a terra-centric, sea-blindness pervades in the Scramble for China’s historiography (Cain & Hopkins, 1993; Petersson, 2002; Phimister, 2006; Zhang, 2002). Present-mindedness also dictated a rail-focus in the transport and communications chapter of the *Cambridge Economic History of China* (since 1800) – unfortunate with Shanghai’s now the world’s largest container port and Beijing focussed on pelagic shipping along its Maritime Silk Road (Köll, pp. 457, 494). Bickers (2011, p. 165) did address the acceleration of communication through the Peninsular & Oriental Steam Navigation Company (P&O) services (via Bombay and Hong Kong) post-1845. He neglected, however, Blue Funnel’s *direct*, ocean-going provision to Shanghai after 1865, facilitated by Alfred and Philip Holt’s engineering-cum-entrepreneurial prowess with capital inherited from their father George (Hyde, 1957, pp. 4–8, 13).

Bickers (2020) compensated: the presence of OSSCo’s *Achilles* in Shanghai “stood out” in January 1867 as “a steamer heading to Liverpool, when all other steamships in the harbour served only local or coastal routes” (p. 45). Through cutting-edge maritime infrastructure and knowhow, Liverpool was Blue Funnel’s home-base. In 1872, a fact-finding mission from Meiji Japan believed Liverpool’s docks – reputedly the world’s largest – were tied to “American prosperity” (Kunitake, 1878/2009, p. 139). Yet, from the 1830s, the “Second City of Empire” was equally buoyed by a “swing to the East” after abolition of East India Company (EIC) monopolies (whence Chinese crews first visited Liverpool on British ships), and imposition of free-trade treaties via “gunboat diplomacy” (Craggs & Loh Lynn, 1985; Webster, 2008). The arrival of Blue Funnel steamships in Shanghai (from end-1866) followed Anglo-French victory in the Second Opium War (1856–1860), and suppression of the vast Taiping Rebellion by 1864 (Chappell, 2016, pp. 539–541). Colonial-style punitive expeditions, therefore, secured the treaty-port concession, the five percent ad-valorem duty, and the extraterritoriality won post-

Opium War One in 1842. Shanghai's proximity to silk- and tea-supplies from a populous and fertile hinterland was capitalized (Horesh, 2014, p. 4; Tsai, 1949, pp. 1, 6). "The heart of foreign trade is Shanghai", declared expatriate mouthpiece, the *North China Herald* in June 1869 (Keller et al., 2013, p. 341). A year later, the Yangzi's seaport accounted for 63 percent of China's total external trade-by-value compared to closest competitor Canton (Guangzhou) at just 13 percent (Murphey, 1953, pp. 64–65).

Long-range commerce via transoceanic mobility, meanwhile, was enabled by a chain of coaling stations in a "global system of energy organisation" (Gray, 2017; Hyslop, 2017, pp. 175–176). Blue Funnel's ports-of-call by 1885 were Gibraltar, Malta, Port Said, Aden, Colombo, Penang, Singapore, Hong Kong, Xiamen, Shanghai, and Nagasaki (Hyde, 1957, pp. 24, 27) – under direct colonial rule or opened by commercial treaties in the "interconnected", "interchangeable" mix of formal and informal empire defining Gallagher and Robinson's "imperialism of free trade" (1953, p. 6). The steamship trumped the clipper post-1869 in the time–space compression and fuel-saving of the Suez Canal (unsuited to sail transit) (Barak, 2015, p. 434; Bickers, 2020, pp. 74–75; Hyde, 1957, pp. 20, 24). In the wider informal empire of transmarine East Asia, ferrying coal to Shanghai from Japanese ports (Falkus, 1990, p. 63; Phipps, 2015, pp. 170–172), Blue Funnel was instrumental in "alter[ing] the geography of the China trade" (Fletcher, 2019, p. 859). Shanghai became "epicentre of a regional trading network" (Chappell, 2016, p. 538).

Like other Liverpool-based liner companies expanding alongside UK formal colonial rule (notably Elder Dempster in West Africa) (P. Davies, 1973, pp. 100–101), Blue Funnel's growth exemplified "reciprocity between shipping and empire" (M. B. Miller, 2012, p. 72). OSSCo's initial three freighters cost £156,000 (£17.4 million in 2026) (Hyde, 1957, p. 19). Characterized, therefore, by large-scale technology and intensive-capitalization, stable political and economic conditions overseas were crucial for long-range planning in steamship businesses. Regular, reliable fixed-schedule services (utilizing top-of-the-range vessels) induced brand-loyalty with shippers (à Campo, 1996, pp. 64, 83). Agency houses were the eyes-and-ears of imperial shipping in colonial ports (M. B. Miller, 2012, pp. 171–172), and the Holts leveraged on links to Liverpool merchants established in Shanghai; notably John Swire & Sons, known locally as Butterfield & Swire (B&S) or Taikoo (Bickers, 2020, p. 45; Hyde, 1957, p. 33). As the original foreign leasehold of 43 acres in 1843 expanded nearly 50 times 20 years later (Murphey, 1953, p. 72), Swire joined the elite foreign traders and shipping agents that muscled onto the Huangpu Bund. Erecting wharves, warehouses, offices and residences, the commercial settlers transformed the urban landscape, building a "place of a different order" (Yeh, 2007, p. 54), shifting Shanghai's locus to the riverfront and condemning the original walled "Native City" to "urban oblivion" (Henriot et al., 2019, p. 5). Shanghai was "spatially re-imagined" (Yeh, 2007, p. 54), but, in the waterside land-grab, property values were jacked-up to prohibitive levels (Horesh, 2014, pp. 44–46; Murphey, 1953, p. 63; Wasserstrom, 2009, p. 22); social exclusion, population displacement and environmental degradation not dissimilar to China's twenty-first century Belt and Road Initiative (BRI) projects in port cities like Colombo and Piraeus (Apostolopoulou et al., 2024).

B&S's personnel found and booked cargoes for Blue Funnel. Free navigation between the Yangzi treaty-ports was guaranteed by international protocol post-1860 (Köll, 2022, pp. 464–465), and B&S supplied internal-market access from 1872 through the China Navigation Company (CNC)'s prosperous, fast-growing feeder-fleet (Hyde, 1957,

p. 34; K.-C. Liu, 1959, p. 448). Swire, moreover, designed shipping conferences (de facto cartels) from 1879 which, like the formal colonial world, managed competition through apportioning cargoes and setting rates (P. Davies, 1973, pp. 109–110; Hyde, 1957, pp. 54, 61–62), and proving a “gold mine” for the Liverpool line, according to Swire’s senior partner in 1882 (Marriner & Hyde, 1967, p. 181 in Bickers, 2020, p. 107).

The Swire connection underscored Blue Funnel’s beneficence from a quasi-colonial institutional milieu at Shanghai, constituting an urban familiarity and a complementary “center in the Periphery” (Galtung, 1971, p. 83). A local post office, “the most important communications institution of informal empire”, emerged during 1863 (Harris, 2018, p. 419) as British and American concessions merged into the International Settlement (administered by the Shanghai Municipal Council with, *inter alia*, its own police-force). A “transnational colonialism” (Jackson, 2018), but British commercials predominated with executive positions seldom occupied by indigenes (Bickers, 1998; Horesh, 2014, p. 22). Manifesting a “hybrid colonial state”, the Shanghai-based British Supreme Court for China and Japan oversaw extraterritoriality after 1865 (A. Thompson, 2024, pp. 89, 181). Conveniently for Blue Funnel, the consular court specialized in dispensing justice to the swelling “rowdy” sailor community, “augmenting shipboard discipline” for a community “integral to the imperial enterprise” where British-flagged vessels in Chinese waters were treated as extensions of UK territory (Whewell, 2015, pp. 55–56, 129–130). Hard-power back-up was delivered by the Royal Navy’s China Station, split with the East Indies command in 1864, and boasting the largest number of ships of any Admiralty station (Gove, 2004, pp. 7–8).

A market in foreign-owned shares operated from 1866 as “law and order ... entrenched Shanghai’s comparative advantage as an island of stability” (Horesh, pp. 32, 46). Above all, was the British-dominated Imperial Maritime Customs Service (IMCS). Incepted 1854, the Customs expanded and systematized under Robert Hart’s leadership post-1863. Chinese on paper, in its racial hierarchies and “civilising mission”, IMCS was more like a colonial civil-service. Collecting revenues, the Customs also encompassed functions central to maritime trade – cargo-appraisal, harbor-maintenance, quarantine, anti-piracy, navigational aids (notably lighthouses), and publishing statistics (Brunero, 2006, pp. 3, 15–17, 18; Keller et al., 2013, p. 342); knowledge-accumulation crucial for empire-building (Saha, 2022; Tagliacozzo, 2003). Overseeing harbors per colonial Durban, Custom Houses – esthetically and functionally – oozed imperial power (Hofmeyr, 2020, pp. 1037–1038), replicating the imposing edifices of metropolitan waterfronts (notably Liverpool’s) (de Figuerido, 2003). Chimes from the three-storey clock tower crowning Shanghai’s revenue office post-1893 “set the pace of urban life” (Yeh, 2007, p. 81, 235).

Also paralleling Durban (Hyslop, 2017, p. 175), maritime security was enhanced by submarine telegraph cables illegally laid in 1871 by a Danish-registered (yet British majority-owned) firm (Köll, 2022, p. 460; R. R. Thompson, 2015, p. 396). The poles and wires lining and criss-crossing central Shanghai’s streets after 1878 (Wasserstrom, 2009, pp. 48–49) marked an urbanity driven by “steam globalization” (Darwin, 2020, p. 292); a “steam-powered neo-Europe” as Jasanoff (2017) described Conrad’s imaginary Latin-American port-city of Sulaco (p. 253). Twenty-five-year-old Richard Holt, nephew of founders Alfred and Philip, indulged in the urban culture of informal empire on a business trip to the emporium August–September 1893: he played tennis at the cricket

club, shot snipe on the racecourse, and attended the country club with “Rank, fashion & beauty of Shanghae [sic.] present” and the races in Chefoo (Yantai), “the summer resort & bathing place of North China” (Holt, 1892–1893). Evident was a “structure of foreign privilege that made Chinese residents of the enclaves feel like second-class citizens” (Wasserstrom, 2009, p. 24). Underscoring “racial and cultural differences”, Richard’s unimpeded hunting upriver – as in Malaya, Borneo, Java and Sumatra – again suggested the Yangzi Valley’s crypto-colonial condition (Peckham, 2016, p. 227). Holt’s colonial-like attitudes chimed with the settler “Shanghai mind” in derogatory dismissals of indigenous urban culture and economy (Bracken, 2019, p. 172). At a “native” restaurant, he found the “feed” “exceedingly beastly” and vowed “never again to eat Chinese chow unless I am otherwise bound to fast”. The “singsong girls & actors” performing nearby “made a most fearful & incessant noise”, while Blue Funnel’s heir-apparent dismissed as “absurd” that 14 yards of material were consumed producing silk dresses (Holt, 1892–1893).

Beyond a few urban enclaves, a standard critique of the informal-empire paradigm for vast and various China is that minimal economic penetration (or governance-at-a-distance) troubled the Qing regime in Beijing. China “was altogether a big, tough nut to crack” (Hyam, 1976, p. 132). Yet, in the “lumpy spatiality” and “racial capitalism” of colonialism (Saha, 2022, pp. 427, 430–431), the Shanghai “bridgehead” (Darwin, 1997, pp. 629–630; Galtung, 1971, pp. 81, 83–84) can be classified “semi-colonial”. In empire’s “incoherence” and “plural sovereignty”, Wilson and Dilley (2023) accept treaty-ports (Shanghai especially) as one of eight colonial archetypes (pp. 192, 210). “[T]o all intents a European colony”, maritime-gateway Shanghai was “‘head and shoulder’ above” crown-colony Hong Kong as a British business hub (Darwin, 2020, pp. 284, 292; Horesh, 2014, p. 7). Gallagher and Robinson’s informal empire paradigm intersects with a long tradition in Chinese scholarship of labeling Qing China a “semi-colony” (Osterhammel, 1986, pp. 296–297). Resonating with Blue Funnel headquarters in Liverpool (the mega-port for northern powerhouse Britain), Zhang (2002) judged the Opium Wars fought “to open the market – chiefly for manufactured goods” (pp. 126–127). Archetypal imperial division of labor, Blue Funnel’s earliest voyages swapped textiles (cotton and woolen) for tea (Bickers, 2020, p. 45; Hyde, 1957, pp. 26–27); an unequal exchange of secondary for primary production (meeting one of Osterhammel’s “semi-colonial” criteria) (1986, p. 291). Enjoying a “virtual monopoly” from Liverpool, by 1898 Blue Funnel carried nearly two-fifths of UK cottons to China (Hyde, 1957, pp. 61, 104). As late as 1904, “fine goods” (Lancashire and Yorkshire textiles) remained Blue Funnel’s “most important” outward cargo (OSSCo, 17 February 1904). Mirroring socio-economic violence in colonial India (addressed by Davies in this Special Issue), Blue Funnel delivered the means to annihilate Shanghai’s artisan textile-industry by the 1880s (Murphey, 1953, p. 124).

Shanghai industrialized from the later-nineteenth century, boosted by Chinese economic nationalism and concessions to foreign manufacturers in the Treaty of Shimonoseki (1895) ending the Sino-Japanese War (Keller et al., 2013, p. 351; Ma, 2008, pp. 359–362, 370–372; Wasserstrom, 2009, p. 49; Yeh, 2007, pp. 21–22). But OSSCo didn’t lose. Textile, metals and machinery factories utilized UK-made plant (Tsai, 1949, pp. 68, 70). In 1891, a year after Shanghai’s first cotton-weaving mill opened, the direktorium reported “a great increase in the quantity of Manchester goods” carried outbound. But

textiles and metalware were now supplemented by a plethora of cargoes, including machinery, prefabricated iron-structures, chemicals and construction materials (OSSCo, 11 February 1891). Hence, Blue Funnel increasingly supplied capital goods for Shanghai's import-substitution, and, indirectly, fueled rapid urbanization as the population of the Chinese-administered districts doubled in the early-twentieth century to reach 1.17 million by 1915 (Henriot et al., 2019, p. 15). Shocking labor exploitation and housing conditions, compared to "the first, and worst phase" of Britain's Industrial Revolution by celebrated economic historian R. H. Tawney (1932, p. 150), and racialized, asymmetrical utility provision, matched colonial port-cities in South and Southeast Asia (Kooy & Bakker, 2008, pp. 378–382; McFarlane, 2008, pp. 418–428; Murphey, 1953, pp. 36–37).

Meantime, a racialized division of maritime labor emerged. After 1892, Blue Funnel employed large numbers of Chinese, especially in engine-rooms, with "white men on deck" (Tabili, 1994, p. 48; Wong, 1989, pp. 3, 89–90). Hiring more Chinese mirrored ethnic employment inequalities amongst UK shipping lines throughout formal empire. Elder Dempster, for example, deployed West Africans in "the worst jobs, notably stoking". The "intricate shipboard hierarchy ... derived from and [was] justified by the racial hierarchy"; intimately "linked to the industrialization of seafaring" (Tabili, 1994, pp. 48–49). Free-trade imperialism exemplified, where free movement of labor and goods were hand-in-glove, ship-owners hired seafarers irrespective of ethnicity at the lowest rates possible (Isserman, 2024, p. 141).¹ Liverpool's shipowners claimed the sobriety, obedience and efficiency of Asian ratings made them preferable to White Britons (Parliamentary Papers, 1903, pp. 228, 229, 265). OSSCo was rated an ethical employer by a British diplomat in 1902 (Parliamentary Papers, 1903, pp. 229–230), but Chinese seafarers contracted in Hong Kong or Shanghai were paid one-fifth to one-third less than UK coworkers (Wong, 1989, pp. 79, 96). Nor were Chinese entitled to board-and-lodging perks on discharge. Separate Chinese billeting onboard, meanwhile, was sub-standard (Falkus, 1990, p. 114): Ship's Surgeon J. J. Abraham (1911) observed c.1905 "a long, narrow, dim-lit place, with two tiers of box-like bunks around three of its walls" (p. 24). Questioning Blue Funnel paternalism (Benton & Gomez, 2008, pp. 81–83), only Chinese signing at UK ports received wages approaching those of British mariners (and still typically 25 percent lower) (Hansard, 1908; Wong, 1989, p. 79). "John Chinaman" was the respectful epithet for overseas-Chinese in Liverpool and onboard (Broady, 1955, p. 66). But, on Abraham's voyage, the derogatory "Chink" was often uttered by the all-European officers when discussing crew below-deck (Abraham, 1911). Notwithstanding tightened immigration controls, Blue Funnel's Chinese labor-pool proved ideal strikebreaking and blacklegging material (notoriously during the 1911 General Transport Strike) (Belchem & MacRaid, 2006, pp. 373–374; Roberts, 2017, p. 208; Wong, 1989, p. 78). Blue Funnel was key, therefore, to the growth (though not necessarily origins) of Liverpool's colonial-style Chinatown, reckoned twice the size of London's (and larger than New York's, San Francisco's, Manila's and Panama's) by the early-twentieth century (Auerbach, 2009, pp. 11, 52, 64, 209; Belchem & MacRaid, 2006, p. 370; Roberts, 2017, p. 207; Wong, 1989, pp. 3, 6, 9).

At fin-de-siecle, Blue Funnel's dominance of the UK–China trade, centered on Shanghai, was confirmed. Strengthening its "hold upon the China trade" was OSSCo

policy (OSSCo, 7 February 1900). Competition from the late-1880s with the Glasgow--based (and Manchester-linked) China Mutual line was overcome through a bilateral agreement (OSSCo, 17 February 1892). Subsequently, in 1902, Blue Funnel acquired majority-control of Mutual. The Managers were “well satisfied” with the 13 “fine modern vessels” integrated, three of which were brand new, and, “considerably larger” than Blue Funnel’s existing ships, ideal for heavy and bulky cargoes. Removing its only rival from the UK west-coast, OSSCo occupied “a very strong position in the [East Asia] trade” (OSSCo, 11 February 1903). Whereas Blue Funnel sustained a weekly Far East service and Mutual a three-weekly one in 1902, competitors Glen and Ben lines only managed one sailing every three weeks, and Mogul and Shire one per month (Parliamentary Papers, 1903, p. 81). With nine additional freighters in 1906, Richard Holt was delighted OSSCo “count[ed] fourth amongst British ship-owners” and with “ships fully employed” (Dutton, 1989, p. 17). The 1911 conference agreement apportioned the Liverpool-controlled group over 60 percent of pooled-cargo outward on the China–Japan run (Falkus, 1990, pp. 130–131). Blue Funnel contributed significantly to Shanghai’s command of around half of China’s foreign trade 1870–1930 with average import and export shares of 55 and 45 percent respectively (Keller et al., 2013, p. 345), and where in 1904 “the British still easily maintained their premier position with over 50 percent of the [steamship] shipping of the port” (Diplomatic and Consular Reports, 1906, p. 18). Shipping using Shanghai of about 6 million tons in the early-1900s was roughly half the volume entering Liverpool in 1900 (Liverpool, 1911). Consequently, Shanghai was crucial to OSSCo becoming Liverpool’s largest shipping group by 1914 (Falkus, 1990, p. 174).

Mutual’s absorption drew Blue Funnel closer to London-based banks. Even after embracing limited liability in 1902, OSSCo’s principal shareholders were the Managers, Holt family members, and business colleagues. Ordinarily, capital-raising was internalized via a reserve investment-fund (Hyde, 1957, pp. 143–148, 151–152; Falkus, 1990, pp. 4, 97–98, 108–109). Yet, in a complex financial maneuver (Hyde, 1957, p. 153; OSSCo, 11 February 1903), the inability of the “old directors” to “manage the distribution of the compensation for disturbance fund” led Richard Holt to seek additional finance in the City (Dutton, 1989, p. 9). Cain and Hopkins (1993) certainly included shipowners in their “gentlemanly capitalist” nexus of imperial financial-cum-service interests (pp. 20–22, 170–171, 179–180). OSSCo’s founding was coterminous with the birth of the Hongkong and Shanghai Banking Corporation (HSBC), financier of the taipan trades shipped by Blue Funnel. In the interlocking of marine trade and finance, OSSCo supplied loans to both CNC and HSBC (Bickers, 2020, p. 67; Hyde, 1957, p. 50; K.-C. Liu, 1959, p. 448). On his sojourn in eastern Asia, Richard Holt wielded a *Lettre de Crédit Circulaire* from top merchant bank Barings. Arriving in Beijing in September 1893, Holt was entertained by Inspector-General of Customs Sir Robert Hart and was a guest of HSBC’s agent (Holt, 1892–1893). Leading public-school and Oxbridge-educated, the socio-cultural capital and “gentlemanly” acceptability of the second generation of Holt shipping barons was marked by Richard’s election as an MP in 1907. Mixing metropolitan politics and commerce, Holt combined the business of the House with China Conference meetings in the City (Dutton, 1989, p. 21).

For Cain and Hopkins (1993), the Foreign Office, allied with HSBC and threatened by Russian, French, and German incursions post-1895, defended China’s territorial integrity

and financial stability (and, hence, debt-servicing capability). Simultaneously, the UK's "sphere of influence" was secured along the Yangzi – Blue Funnel's supply artery via Shanghai (pp. 432–440). British commercial and financial interests combined in IMCS, which became the "main security for foreign loans to China" (Brunero, 2006, pp. 3, 19). Stressing benefits for industrial capitalism (equally advantageous for OSSCo), Zhang (2002) identified UK loans as facilitating "firmer control of China's tariffs", helping British traders "monopolize China's imports and exports", and, concurrently, promoting "exports of British products to, and exports of raw materials from, China". Railways opened the interior while also securing British domination of the Yangzi, since loans after 1898 were conditional upon Beijing desisting from awarding concessions to alternative powers (pp. 126–128).

Rail-focussed, however, Cain and Hopkins (1993) and Zhang (2002) provide terra-centric accounts, overlooking maritime-oriented urban investment. Safe-and-secure in the Yangzi delta, in the 1900s, OSSCo diversified into port development, mirroring formal colonialism. In West Africa, Elder Dempster upgraded infrastructure and urbanized waterfronts conducive to global deep sea-going exchange (P. Davies, 1973, pp. 114–116). Free-trade industrial and "gentlemanly-capitalist" financial interests coalesced as Blue Funnel emerged as an infrastructure-investor in China. At co-evolving port-cities (McFarlane & Rutherford, 2008, p. 364), even high levels of intra-Asian trade (cutting across imperial-networks and core-periphery dependencies) relied upon a European-led maritime infrastructure and technology (M. B. Miller, 2012, pp. 2, 65, 67). Shanghai was Blue Funnel's gateway to northern China – "up-coast" expansion by sea-lane, not rail-line, especially as China's Grand Canal arterial waterway fell into disrepair (Halsey, 2015, p. 188; Horesh, 2014, p. 48). During 1904, a monthly service loaded for "Taku Bar" (Tanggu) with transshipment to Tianjin. Freighter-discharge proving "very unsatisfactory", however, OSSCo sponsored a joint-venture with B&S. A tug- and lighter-fleet, "greatly facilitated" loading and unloading. Meanwhile, in Blue Funnel's financier incarnation, the shareholding expected to "prove a profitable investment" (OSSCo, 8 February 1905), leveraging on the British concession's enlargement at Tianjin in the early-1900s (Nuzzo, 2021, pp. 351–352).

OSSCo's major contribution to China's built-environment, however, was at Pudong on the Huangpu's right bank in a substantial direct investment in property. Described by the *North China Herald* in 1900 as a "steadily increasing line of docks, mills, and various industries, studded with chimneys" (Wasserstrom, 2009, p. 49), Pudong lay outside the International Settlement in the Chinese Municipality. Confident in the future of the Shanghai conurbation, Blue Funnel engineered large-scale wharf development. Added security was provided by further extensions of informal empire after the Sino-Japanese War (1894–1895) and the Boxer Rebellion (1899–1901). The International Settlement enlarged around three times in 1899 to reach 5584 acres (approximately 8.7 square miles). Hiked wharf charges encouraged OSSCo to develop independent facilities post-1906 (OSSCo, 6 February 1907). Self-help reflected co-constitution and co-evolution in the informal colonial city, like the formal variety, through private-sector infrastructure projects. The Shanghai Municipal Council provided public goods – bridges and roads – and encouraged utilities provision. But this was not universal and was sub-contracted to private (invariably British-owned) companies (Ma, 2008, p. 373; Tsai, 1949). As in Bombay/Mumbai, the "urban fabric ... [was] *always* ... fragmented", and

infrastructure privatization “from water and sanitation to electricity and transport” hardly new (McFarlane, 2008, p. 417).

Evidencing Shanghai’s economic vibrancy over Hong Kong’s, the Pudong complex proved “even more extensive” than OSSCo’s replica in the colony. Opening in 1911, the Managers proclaimed, “one of the most considerable works of the kind in the Far East” (OSSCo, 5 February 1908). Blue Funnel displayed a transformative (co-constitutive and co-evolving) influence on Greater Shanghai’s urban design. Pudong’s sheds and docks employed a cutting-edge, “ferro-concrete” building-technique, “one of the most economical forms of permanent construction”, “rapidly gaining ground in Europe & America owing to its adaptability”, and “practical indestructibility by fire” (OSSCo, 5 February 1908). In preponderant seaborne influences on Shanghai’s urbanism, the wharves at Pudong were “maintained entirely by water transport” with no motor road until 1936 (Murphey, 1953, p. 92). Via Pudong, Blue Funnel joined the ranks of “gentlemanly capitalism” as both service provider and financier.

Confirming Liverpool’s role in maintaining British paramountcy in the Yangzi region, the Mersey octopus extended its tentacles upriver. By 1908, Blue Funnel steamers regularly loaded at Hankou, largest of the Yangzi treaty ports after Shanghai (Murphey, 1953, pp. 98–99), exploiting further erosion of China’s maritime sovereignty which permitted intra-treaty port passage for ocean-going freighters (Halsey, 2015, pp. 73–74). There proved “no difficulty in getting plenty of cargo homewards” from Hankou; and, with railways penetrating the interior, the riverport was “likely to become of great importance” (OSSCo, 10 February 1909). Conrad, and later Gallagher and Robinson, identified the steamship-railway combination essential in gearing Latin-American economies to world markets (Gallagher & Robinson, 1953, p. 9; Jasanoff, 2017, pp. 253–254). Symbiotically, railways were a field for heavy engineering, boosting Blue Funnel carryings of capital goods and materiel, and facilitating extraction and marketing of primary products (boosting imports in turn) (Petersson, 2002, p. 107). Into World War Two, China’s tracks relied upon British and American rolling stock and equipment (Köll, 2022, p. 494). Anticipating a railhead at Hankou, Blue Funnel planned carrying frozen produce; fixed investment followed, aided by extension of Britain’s land lease post-1898 (OSSCo, 10 February 1909). Rather than port hubs substituting for rail junctions, as Köll (2022, pp. 464–465) suggests, they interconnected. By 1911, frequent calls at Hankou were facilitated by OSSCo securing a riverfront site for wharves and berths (OSSCo, 1 February 1911; OSSCo, 7 February 1912). When transferred to Chinese state agencies in 1952, Blue Funnel reckoned £960,000 (around £24.7 million today) was sunk in its Shanghai and Hankou properties (OSSCo, Chairman’s Report, 1952).

By the 1910s, OSSCo, a Liverpool-based logistics multinational, built a vast network of vessels (ocean-going, short-haul and harbor-based), land-leases and fixed investments linking industrial Britain via Shanghai’s port-city bridgehead to Tianjin and along the lower Yangzi. “Informal empire” and “gentlemanly capitalism” apparently served Blue Funnel commendably as “finance, trade and diplomacy” fused in “reshap[ing] of the world”, British-style (Cain and Hopkins, 1993, p. 46; Petersson, 2002, p. 108). The Mission Civilisatrice of “gentlemanly imperialism” gelled with Blue Funnel’s welcoming of the Republic in 1911. Akin to Cain and Hopkins’s interpretation (1993, p. 446), the revolution, although rooted in the Qing’s alleged failure to defend China’s sovereignty, appeared to represent the progress wrought by free-trade imperialism. At the height of

the internal struggle against the Manchu dynasty, OSSCo's executives reported a "certain slackening of exports from home", and Pudong's warehouses overflowed with goods that could not be forwarded inland. Yet, "the revolutionary leaders ... anxiously restrained their followers from interference with foreigners". China's future appeared "hopeful", "directed by men trained according to Western ideas", "expected to encourage the active development of [international] trade" (OSSCo, 7 February 1912). OSSCo recorded "an immense record" profit of over £500,000 (£52.3 million at 2026 values) for 1911 (Dutton, 1989, p. 25). In 1911–1912, the principal political problem occupying Richard Holt's time was UK dockworker and seafarer labor insurgency, not revolution in China. In August 1912, Blue Funnel's chief executive noted: "Business successful, but for incessant strikes, brilliantly so" (Dutton, 1989, p. 27). With OSSCo shipping its largest cargoes ever to Shanghai during 1913, the Liverpool directors found "remarkable that all the political disturbance in China ... produced so small an effect on trade" (OSSCo, 4 February 1914).

Whereas Hazareesingh (2009) rejected "gentlemanly capitalism" for the "commodity-driven imperatives of industrial capitalism" in Glasgow-Bombay interconnections, OSSCo enjoyed the best of both worlds as supplier of manufactures and investor in infrastructure. Hence, industrial and financial aspects of informal empire combined in the Liverpool-Shanghai experience. Scratching beneath the veneer, however, maritime power was no more efficacious and overbearing than land-based faculties. The second half of the article considers an alternative scenario of domestic and international constraints, underlying tensions, and uncertainties within China that placed limitations on the exercise of semi-colonialism. Moreover, Liverpool's gentlemen shipowners did not see eye-to-eye with competing powerbrokers in London.

The limits of seaborne informal empire

China's market was not infinite. It proved frustratingly unpredictable, revealing the impotence of informal empire beyond treaty-port enclaves in the self-sufficiency of the rump Chinese economy. China's slice of world exports in 1870 was just 2.78 percent, declining to 1.98 percent by 1913. The respective figures for deeper-integrated, British-controlled India were 6.88 and 4.46 percent (Keller et al., 2013, p. 347). From Blue Funnel's inaugural homebound voyages, Chinese produce was topped-up with tin and tobacco from the colonial Straits Settlements to fill holds, and, in late-1866, *Ajax* picked-up South African wool (Bickers, 2020, p. 46; Hyde, 1957, p. 27). To mitigate over-tonnaging as well as severe seasonal trade fluctuations, Swire initiated the China Conference (Bickers, 2020, p. 106). Three years after Blue Funnel arrived in Shanghai, a negative Board of Trade report, spotlighting China's "bad transport and impoverished consumers", saw greater potential for opening Ceylon and Brazil (Hyam, 1976, p. 131). OSSCo fell afoul of a persistent western fantasy casting China the world's largest market (Dean, 1976). Outside Shanghai, Lancashire's Blue Funnel-carried textiles faced stiff competition from higher-quality domestic supplies and through inappropriate product and branding (Halsey, 2015, pp. 57–59, 62–64; Osterhammel, 1999, pp. 160–162). Poor communications persisted into the 1900s. The port-city's limited reach emerged in Richard Holt's journey from Shanghai to Beijing, August–September 1893 (by coastal-steamer, riverboat, and mule-cart; only a short stretch by rail from Dagou to

Tianjin). The round-trip took over three weeks, with only four days in Beijing (Holt, 1892–1893). Only from 1908 did Shanghai enjoy its first external rail-link (to Nanking). The local, British-built Wusong-Shanghai line was dismantled in 1877, and merely 195 miles of track existed throughout mainland China by 1894 (Köll, 2022, p. 467). Like long-distance telephony, China's railways remained an “incomplete infrastructure” (Moazzan, 2025, pp. 182–183), “woefully inadequate” to World War Two (Horesh, 2014, p. 8), limiting state-building but equally, penetration of Shanghai's hinterland by maritime-based multinationals.

Superficially, the railway's late appearance in China was inconsequential for an aquatic enterprise: Richard Holt (1892–1893) described the Yangzi as the “principal highway of China”, “immensely broad, generally over a mile”, and “full of water”. But Blue Funnel's “crown prince” traveled in August – given water depths, deep-sea steamers could regularly load at Hankou only in summertime (OSSCo, 10 February 1909). The “industrialization of ocean passage”, “the advent of combustion engines and coal steamers made it easier to overcome the impacts of monsoons, currents, and waves” in East Asian seas (Po, 2018, p. 42). Nevertheless, insurmountable environmental constraints persisted, and “losses through accidents were a common hazard of navigation in Chinese waters” (K.-C. Liu, 1959, p. 452). Passive, natural resistance to British-style maritime modernity was equally evident at Dagou (inaccessible during winter months, given treacherous ice) (OSSCo, 8 February 1905). The sandbar was another impediment: Richard Holt's steamer in September 1893 waited over five hours for a safe crossing (Holt, 1892–1893). Despite concerns by shipowners from the 1860s about silting in the Yangzi delta, the Huangpu's access problems were not solved (and OSSCo's Pudong venture contemplated) until cajoling of Chinese officialdom four decades later. A specific clause in the 1901 Boxer Protocol finally unleashed conservancy-board dredging post-1905 (Horesh, 2014, pp. 41–42; Murphey, 1953, pp. 38–89, 73–78). Previously, Blue Funnel freighters were received and despatched 12 miles downstream at the Yangzi-Huangpu confluence at Wusong (Holt, 1892–1893), where, in 1893, the Customs commissioner observed “available anchorage is not too capacious, and the distance from go-down [*sic*] is a considerable source of expense” (Murphey, 1953, p. 73). Local limitations on imperial trade mirrored Durban, where only at turn-of-century did dredging permit large liners to enter the harbor (Hofmeyr, 2020, pp. 1033–1034; Hyslop, 2017, pp. 172, 176).

Meantime, “very considerable change” in China's trade patterns impacted Blue Funnel “disadvantageously”. Homebound, tea cargoes disappeared in the early-1890s: UK consumers shifted preference to India, and “nothing” was “found in China to fill the vacant space” (OSSCo, 11 February 1891). Swire quit tea-trading in 1893 (Bickers, 2020, p. 195), and at Tianjin, Richard Holt (1892–1893) sought out alternative cargoes from North China such as pig bristles. During 1908, homebound vessels “could not have been filled” without calls in North China and Korea, as substantial trade developed in beans for cattle-feed (OSSCo, 10 February 1909). Concurrently, Blue Funnel fell back on “rough heavy produce” (sugar, rice, sago, timber, gambier) from Southeast Asian ports, and, in the UK-Indonesia trade, an Amsterdam-registered subsidiary emerged in 1891 (OSSCo, 11 February 1891; OSSCo, 17 February 1892). Liverpool liftings were also “very different” from previous “bale & case goods” with “large heavy awkward pieces & packages”. Unsuitable for “heavy deadweight cargoes”, much OSSCo tonnage

proved outmoded. Immediate investment in faster freighters “fully as large” as competitors’ latest vessels was implored. Asset upgrade (and geographical diversification) also reflected that “no beginning has been made of railways in China” (OSSCo, 11 February 1891). Witnessing the agricultural and mineral development potential of British Malaya and Dutch Sumatra with their superior rail-port interfaces (Airriess, 1995; Holt, 1892–1893; Kaur, 1980), Richard Holt pushed for intensified concentration on Southeast Asia, as well as Australian direct services. Connecting with US railheads, East Asia–North America routes inherited from China Mutual expanded (Hyde, 1957, pp. 92–93; OSSCo, 11 February 1903). By 1910, the Java, trans-Pacific, and Australian trades equaled in value those of China and Japan (Hyde, 1957, pp. 126–127).

Homebound sailings were “increasingly dependent” on Straits ports by 1897 for “filling up” given newbuilding to beat competition (OSSCo, 3 February 1897). A decade later, the Netherlands East Indies rescued Blue Funnel, supplying cargoes for “many of the ships that load outwards for China” (OSSCo, 6 February 1907). To employ obsolete tonnage, OSSCo reverted to transporting Chinese “coolies” to Straits ports as “deck passengers” (OSSCo, 2 February 1898) (despite Richard Holt [1892–1893] having portrayed indentured labor as “too near the slave trade to be a very pleasant business”). Superseded by CNC’s services post-1914 (Bickers, 2020, pp. 157–158; Falkus, 1990, p. 37), Blue Funnel’s contribution to Southeast Asia’s labor requirements tacitly admitted higher productivity, extractability and knowability in that region’s colonial export economies, compared to minimal-colonized China.

China’s tea exports relied upon indigenous growers and merchant supply-networks “up-country” beyond Shanghai via indigenous compradors in the Eight Principal Guilds (Abe, 2015, p. 469; Hao, 1970, p. 178). From a British point of view, China’s commodity-chain compared unfavorably with the integrated expatriate-owned managing agency-plantation-shipping complex in the colonial extraction regimes of South Asia (A. B. Liu, 2020; and see Davies in this Special Issue). As Blue Funnel steamers began entering the Yangzi, British merchants failed to ban the guilds as restrictive practices contravening free-trade principles (Hao, 1970, p. 285; Tsai, 1949, p. 49). Foreign merchant firms, like OSSCo-partner Taikoo, employed Chinese compradors, “bicultural middlemen” (Yeh, 2007, p. 13), constituting perhaps the ideal, prefabricated “collaborators” pivotal to Gallagher and Robinson’s informal-empire model (Robinson, 1972, pp. 127–128). Yet, dependence upon compradors, frequently prominent in guilds, for transactions outside treaty-ports exposed inadequate local expertise (Hao, 1970, pp. 24–25, 178, 188–189). Compromising with the “‘particularistic’ practices of Chinese society” (K.-C. Liu, 1959, p. 442), frequent Sino-European tensions arose from defalcation, “squeeze”, and the outside interests of compradors (being simultaneously employees and independent merchants) (Abe, 2015, p. 466; Hao, 1970, pp. 43, 160, 169–170). For Darwin (1997), the comprador “turned out to be a means of containing and controlling Western businessmen in China” (p. 633).

The tenuous nature of British commerce beyond treaty-ports was revealed in Richard Holt’s belief that “Chinese are glad to enter the service of Europeans even at nominal wages as this gives them the protection of European consuls & so enables them to avoid the oppression of the mandarins”. The provincial gentry allegedly sustained “anti-foreign feeling”, “afraid that intercourse with foreigners may stop their extortions” (Holt, 1892–1893). In Holt’s imperial imaginings, then, the rule of law and Merseyside’s

writ was minimal outside the urban enclaves. As Halsey (2015, pp. 71–75) argues, local-level exactions and obstructions were further evidence of Qing China's ability to control western commercial encroachment. Even within Shanghai, the discombobulating nature of Chinese urban culture was representative not of British shipping supremacy but the precariousness of OSSCo's position. Holt's minimal contact with Chinese personnel, relying upon Europeans for information-exchange, was symptomatic of disjunction with the hinterland (Goldsmith, 2017, pp. 57–58). In Shanghai's ersatz-colonialism, recruitment and management of the "bamboo coolies" and clerks at Pudong's cargo-stores were sub-contracted (Falkus, 1990, p. 198). A "den of mystery" to a Ship's Surgeon in 1914, Chinese onboard quarters were "unknown territory", rarely visited by British crew (Falkus, 1990, p. 114). Into the 1960s, Blue Funnel employed Chinese seafarers indirectly via "crew contractors" and "Leading Hands", relying additionally upon boarding-housekeepers for labor discipline (Alfred Holt & Co, 1945; Glen Line Ltd, 1968). In the "indirect rule" of Blue Funnel's labor regime, atop substantially lower wages vis-à-vis Europeans, for hiring and cashing advances Chinese seafarers and their families endured additional fees extracted by "crimps" and "serangs" (Wong, 1989, p. 32).

Rather than the efficacy of maritime-induced informal empire, Liverpool's Chinatown symbolized the absence of jurisdiction beyond the shoreline. OSSCo attempted to stabilize its Chinese labor-force by sponsoring in-house lodgings at the docks. But ex-seafarers established autonomous hostels, laundries, stores, and eateries around Cleveland Square (Roberts, 2017, p. 207; Wong, 1989, pp. 3, 11, 14, 16, 19, 21). Former fireman Won Tip managed a grocer's shop c.1907 and subsequently opened boarding-houses, while his chef after 1908 previously catered at sea. Won concurrently served as a shipping agent, earning commission for assembling Chinese crews, as did Edwardian business-woman Chung Ting (Craggs & Loh Lynn, 1985). Liverpool's *Weekly Courier* described in November 1906 "Chinese characters distinguish[ing] the shop fronts" on Frederick Street (Wong, 1989, p. 9). Stereotyped as an impenetrable community, "Yellow Peril" paranoia around transnational villainy and vice prevailed, summed up in the Scouse adage "don't go down there" (Auerbach, 2009, pp. 68, 105; Belchem & MacRaild, 2006, pp. 370–372; Cook & Cubbin, 2011, pp. 44–45, 47–48; Craggs & Loh Lynn, 1985; Roberts, 2017, pp. 208–210; Wong, 1989, pp. 33, 60–65). A child in 1910s Liverpool, Pat O'Mara (1933/1994), channeled white working-class angst, remembering Chinatown as "mysterious" and "peculiar" with a "tang of opium in the air" (pp. 9–10). Octogenarian Chinese-heritage residents interviewed in the 1980s recalled hostels with cramped dormitories and communal "chow" at set times, resembling regimented life at sea; pavements, meantime, were lined with squatting Chinese mariners awaiting ships, the husks from their *gua zi* (cracked roasted pumpkin and melon seeds) filling the gutters (Wetherell, 2025, pp. 26–27; Wong, 1989, pp. 12–13, 51). A balanced report in the progressive *Daily News* from 1907 disclosed clean lodgings; opium-smoking but moderate; young Liverpoolian females chasing Chinese seamen, not vice-versa; gambling no more problematic than other ethnicities; and, more dangerous districts where no Chinese resided (Price, pp. 147–148). Nevertheless, a 400 percent increase in Chinese signing at British ports 1905–1908 (Auerbach, 2009, p. 39), and a five-fold expansion in both China-born residents and Chinese-run boarding-houses on Merseyside (1901–1911 and 1907–1915, respectively) (Wong, 1989, pp. 4, 11), set Blue Funnel on a collision course with "white labourism" and the "hysterical racial rhetoric" of the

National Sailors' and Firemens' Union (NSFU) (Hyslop, 2017, p. 182). Presaged in California, the Australian colonies, and Transvaal was an "ascendant democratic power of white manhood" (Lake & Reynolds, 2008, pp. 27, 31). Implying Chinese seafarers were robbing British jobs, Sino-phobic labor mobilization in Edwardian Liverpool included funeral-style processions featuring "yellowed-up" dockworkers, and Blue Funnel found itself in the anti-immigration firing-line (Bower, 1936/2015, pp. 113–114; Wong, 1989, pp. 60, 64). NSFU won significant pay rises in 1911, but the seafarer collective pledged to continue the struggle to exclude Asian labor from British ships (Isserman, 2024, p. 114).

OSSCo's dependence on Chinese mariners reflected intense competition as the Holts mimicked unwelcome newcomers like London's Glen Line and Copenhagen's East Asiatic (Hyde, 1957, p. 88; Price, 2019, p. 35; Tinning, 2023, p. 121). Simultaneously, declining tea exports and import-substitution were long-term opportunities, but simultaneously, short-term threats requiring expensive defensive measures. Investment in fleet renewal 1890–1902 exceeded £1.5 million (Hyde, 1957, p. 148) (around £163.7 million today). Reorienting toward colonial Southeast Asia also hedged against international competition. Free-trade imperialism was not mercantilism. Competitors could not be excluded from Shanghai indefinitely, given most-favored-nation clauses in international treaties. Even before the Treaty of Shimonoseki afforded Tokyo similar privileges to western powers, Richard Holt (1892–1893) learned that cotton plantations around Suzhou Creek supplied Japanese mills. During 1903, Japan's yarn imports increased 90 percent following a two-thirds leap in the price of American cotton at Liverpool, which "naturally caused a heavy decline in shipments" (Diplomatic and Consular Reports, 1906, p. 8). Including local processing into bricks, an alternative Russian tea supply-chain via Tianjin and Vladivostok, utilizing Chinese-owned steamships, was well-established by summer 1893 when Richard Holt visited Hankou (Holt, 1892–1893; K.-C. Liu, 1959, p. 443). Intra-British rivalry was overcome by agreement and acquisition, but overseas, state-sponsored interlopers were troublesome. International conferences could be abandoned overnight, and by 1896, Japanese, Spanish, and German competition loomed (OSSCo, 5 February 1896). Subsidies showing "no signs of disappearing" by 1900, OSSCo's executives believed "the independent British ship-owner" faced a "special difficulty": excess shipping space given "enormous building" overseas (OSSCo, 7 February 1900). Consequently, Mutual was acquired reluctantly – the Managers confessed "not anxious to purchase" but sought to avoid the Glasgow line's absorption by "formidable and objectionable competitors" (OSSCo, 11 February 1903).

Overseas commercial competition intermeshed with international power-political rivalry. Germany's 1898 occupation of Jiaozhou Bay sparked a "Scramble for Concessions", threatening to shut the China door. The Managers "naturally" watched the "crisis" "with something more than the interest of dilettanti", fearing trade diversion to continental Europe should China be partitioned (OSSCo, 2 February 1898). Worldwide, fin-de-siecle Britain's ability to operate a free-trade imperialism was circumscribed by challenges to its previous paramountcy (Kennedy, 1984) (reflected in Conrad's *Nostromo* re: US machinations in Panama) (Jasanoff, 2017, pp. 270–271). Only "very specific and ... short-lived" opportunities existed in China for "gentlemanly capitalism" to "filter through" (Petersson, 2002, p. 103).

OSSCo's experience of the Boxer insurgency proved case-in-point. The grassroots violent resistance, and subsequent eight-power occupation, was a temporary trade boost. The Managers envisaged "no immediate likelihood of a fall in freights, especially if the war is further protracted & continues to lead to the withdrawal of many large steamers for transport purposes" (OSSCo, 7 February 1900). Through the Merchant Navy's imperial-reserve role (Hyslop, 2017, p. 175), the "Little wars of Empire" were good business. "Freights out & home were well maintained" during 1900 with "all voyages" recording "satisfactory profits", the rebellion having "surprisingly little immediate influence" upon Blue Funnel's business, while ordinance cargoes and warship supplies were picked up (OSSCo, 20 February 1901). Richard Holt's diary entries in June 1900 reveal anxieties, however, given the "serious character" of the "anti-foreign outbreak". Westerners in Beijing were "besieged and possibly even massacred". British-led marines invaded, but "all telegraph wires" in northern China were cut and their fate "unknown". The legations were unscathed, but cutting communication lines, and consequent "information panic", underscored the disconnect – physical and psychological – between littoral and interior China (R. R. Thompson, 2015, pp. 410–413, 417, 418). Moreover, like 1898, the "unpleasant" state of foreign affairs was compounded by "considerable jealousy ... amongst the powers with regard to their interests in China"; there was "always a fear that they may fly at one another instead of working for the common end" (Dutton, 1989, pp. 2–3). Predicting a return to the Scramble for Concessions and escalation into regional war, the angst was shared by Prime Minister Lord Salisbury (Otte, 2007, pp. 180, 182). China's trade remained "naturally rather disturbed" in August, but Holt reported things "improving a little" "now that the Ambassadors have been rescued" (Dutton, 1989, p. 3). By 1902, the "general outlook" was considered "not unfavourable" with the flow of outward cargo for China "steady" (OSSCo, 5 February 1902).

In permanent flux, therefore, commercial assessments shifted year-on-year in China's uncertain politico-economic landscapes. By 1903, global shipping recession was exacerbated in Blue Funnel's view by "excessive indemnities [totalling over 400 million taels; £50–55 million or £1.4 billion at current prices] extorted by foreign governments" post-insurgency, especially with trade "much over handicapped by a yet further fall in the value of silver, which always restricts the operations of merchants" (OSSCo, 11 February 1903). The complexities of China's multiple silver-based currencies – subject to baffling fluctuations in exchange with gold-standard sterling – further drove dependence upon compradors, and exercised Richard Holt and expatriate merchant principals during August 1893 (Hao, p. 24, 25; Holt, 1892–1893). Another barrier to commerce inland was the "obscurities of Chinese currency" (Darwin, 1997, p. 632). Observed by Britain's consul in Shanghai, exchange rates fluctuated 1901–1904 to an "abnormal degree", and a rapid fall in exchange during Spring 1902 made business "exceedingly slack" (Diplomatic and Consular Reports, 1906, pp. 3–4). "Things have never been nearly as bad as in the autumn of 1902", judged Richard Holt (Dutton, 1989, p. 12). Blue Funnel "recourse[d] to coal charters and other devices" (OSSCo, 11 February 1903).

The financial stranglehold on Beijing was good for London bankers and bondholders, therefore, but less good for Liverpool shipping because of depressed earning-power and reduced demand for British goods. As such, another limitation on seaborne informal imperialism was intra-metropolitan contestation. "[I]ntensified, interurban competition"

(Kaufman & Tobias, 2018, p. 2718), and conflicts between Liverpool's and London's specialisms, were features of colonial as much as post-colonial globalization. In the shipping line's ambiguous position betwixt industrial and financial capitalism, relationships with "gentlemanly capitalists" in the City of London were invariably strained – unsurprisingly given the less-than-gentlemanly speculation (and scam) associated with investments in Qing China (Phimister, 2006). Like Liverpool-spawned agency houses in Latin America and South Asia, Swire transferred headquarters to London in 1871 (R. M. Miller & Greenhill, 2008, pp. 87–88; Mollan & Michie, 2012, p. 545). Remaining loyal to Merseyside and its manufacturing roots, however, OSSCo did not follow. In Liverpool's belle époque, Blue Funnel tightened the northern port-city's grip on Shanghai. "Eastern produce" was principally offloaded in London pre-1899, given the clustering of commodity markets there (Mollan & Michie, 2012, pp. 543–545; OSSCo, 7 February 1900). As requested by Liverpool importers, however, OSSCo provided a direct homebound service bypassing London (OSSCo, 7 February 1900). Merseyside's superport, after all, ran the capital a close second as the British Empire's premiere port: to 1939, Liverpool's export values were higher than London's (Stoney, 1983, p. 126). Reflecting, moreover, Merseyside's concentration of large liners at its Edwardian zenith, the "provincial" port's total tonnage was one-third higher than London's, and "the average Liverpool ship twice as big as the average London ship" (Liverpool, 1911). Seeking "a big ship" with "a good company" in the capital c.1905, medic Abraham was indeed advised by a seasoned seafarer that "London's not in it with Liverpool when it comes to shipping!" (1911, p. 7). Richard Holt noted Liverpool "expanding everywhere" during 1903 "amidst all the outward signs of great prosperity", and was delighted, therefore, to be elected chairman of the Docks and Quays Committee of the Mersey port authority (Dutton, 1989, p. 11). In port-city rivalry with London, "internalising [colonial] globalisation", avoiding "a level playing field with other, potentially more powerful cities", and leveraging "place-specific advantages" (Kaufman & Tobias, 2018, pp. 2704, 2707, 2718), Blue Funnel sustained Liverpool's alternative metropole through vicinity to Britain's industrial heartland and a trans-imperial liner-shipping cluster.

Yet, in favoring London's financial over Liverpool's mercantile interests in the indemnities issue, OSSCo lacked clout. The Holts were closely connected to Liverpool's financial sector (Falkus, 1990, p. 112; Hyde, 1957, pp. 6–7). As Barings discovered after World War One, however, the Bank of Liverpool & Martins struggled even to service Liverpool's cotton trade (Tod, 1919). Managing Shanghai's currency and Beijing's overseas debt, HSBC enjoyed intimacy with Whitehall and London financiers that Liverpool bankers and shipowners lacked. In shipping, London-based P&O, government-supported with a captive passenger market of UK diplomatic and military personnel, was likewise better-calibrated with "gentlemanly capitalism" (Palmer, 2006, p. 229). In 1867 and 1879, OSSCo failed to wrest the lucrative government mail contract from P&O (Hyde, 1957, pp. 41–42); and Richard Holt and other laissez-faire shipping magnates lamented government subsidies on the Atlantic for Cunard in 1902 (Dutton, 1989, p. 9). Like Scotland's imperial shipping barons, William Mackinnon and Donald Currie, the Holts' relations with the City and central government were shallow and short-lived (Hyslop, 2017, p. 175; Munro, 2003, pp. 505–510; Porter, 1986, pp. 281–282). Liverpolitan "sense of superiority and disdain" (Falkus, 1990, p. 14) toward London was reinforced by Unitarian religious and Liberal party-political affiliations

(Dutton, 1989; Goldsmith, 2017). An anti-establishment mindset was exemplified by Richard Holt's opposition to the Boer War; he despised arch-imperialist businessman Cecil Rhodes and despaired of the "miserable Jingo and protectionist movement" infiltrating Britain's political economy (Dutton, 1989, pp. 2, 4, 5, 7, 8, 14). "[C]onvinced Free Traders and humble followers of Cobden, Bright and Gladstone" (Dutton, 2002, p. 6), the Holts were outsiders even within the Liberal government after 1906. Richard clashed with the party's trade-unionists, including Middlesborough MP and NSFU supremo Joseph Havelock Wilson (Hansard, 1908), and led a backbench revolt against the "socialistic tendencies" of Lloyd George's 1914 budget (Dutton, 1989, p. 31).

Blue Funnel's location within informal empire was affected, therefore, by alternative power-centres (national and transnational). Furthermore, the transience of Liverpool's influence, and OSSCo's lack of control in China was even more evident in the twists and turns of the 1904–1914 period. The Russo-Japanese War caused "great uncertainty" and "much anxiety" for Blue Funnel's management (OSSCo, 17 February 1904). 1903 was a tough year anyway, given war fears, combined with currency fluctuation, tight money market, and depressed textiles trade in Shanghai (Diplomatic and Consular Reports, 1906, p. 4). Richard Holt's "expectation of war" at end-1903 dampened his spirits, and, on the outbreak of hostilities in February 1904, he spent most of a day in the City of London, "business being naturally a little anxious" (Dutton, 1989, pp. 12–13). In Liverpool, there was "no sign of any slackening of shipments of cargo to the East", while homebound "withdrawal of Japanese steamers" produced "free flow of cargo to the Company's ships". Nevertheless, the directorate expected "so great a disturbance and so serious a waste of wealth ... prejudicial to commerce" (OSSCo, 17 February 1904).

Defying predictions, therefore, in October 1904, Blue Funnel's boss recorded "a big spurt in the China trade" (Dutton, 1989, p. 14). Cargoes were "abundant" during 1905 and war's close appeared to mark the beginning of "considerable expansion" (OSSCo, 16 January 1906). Blue Funnel benefitted from China's "golden age of gentlemanly imperialism" (Petersson, 2002, p. 106). In the finance-trade circuit, foreign-lending boosted UK exports through funding infrastructure and new plant (principally sourced *and shipped* from Britain). In London's rapprochement and consensus with Berlin, and demonstrative again of the leading role of overseas maritime enterprise in co-constituting treaty-port urbanism, OSSCo engaged a German firm to build the Pudong facilities (OSSCo, 5 February 1908) – in parallel with HSBC's "gentlemanly cosmopolitanism", with one-third of its directors German and the bank's funding of German merchants (who distributed over half Manchester's goods in China) (Cain & Hopkins, 1993, p. 443; Osterhammel, 1999, p. 159).

Yet, reliance upon German engineers for network provision was indicative of UK undercapacity at Shanghai. Emphasizing informal empire's temporality, against the backdrop of nationalism and protectionism in Europe, inter-imperial cooperation broke down following the 1911 Revolution (Petersson, 2002, pp. 115–116). During 1913, a downturn in western Canada, "seriously" reducing Chinese migrant traffic to Vancouver, intersected with disruption to the outward conference, the "smooth working" of which continued "a most important factor" in OSSCo's "prosperity" (OSSCo, 4 February 1914). Intense Anglo-German commercial competition in the Edwardian era, wherein the Yangzi "sphere of influence" was hardly hermetically sealed (Osterhammel, 1999, p. 159), impacted Blue Funnel through the determination of Hamburg's Rickmers-

Linie to secure a regular Shanghai berth. The Rickmers fight was only “summarily stopped” by unpredictable geopolitics far beyond OSSCo control: the outbreak of World War One (OSSCo, 10 February 1915). Equally, however, B&S feared a dent in Blue Funnel business through lost freight from German merchants in which the Liverpool line was exposed by “poor British participation in China’s export trade” (Bickers, 2020, p. 202).

Conclusion

Shanghai’s “international standing and economic development drew on the infrastructural and cultural connections with the imperial metropolises” (Horesh, 2014, p. 14), one of which was clearly maritime Liverpool via Blue Funnel. Business-cum-economic historical geographies reveal a broader sweep of transformation in urban environments wrought by the connections and imaginings of imperial maritime enterprise. In its displacements and dispossessions, containerization from the 1960s and 1970s was not especially novel.

Yet, from a maritime and spatial perspective, Liverpool’s and Blue Funnel’s control, let alone influence, dissipated beyond the urban colonial-style entrepot frontier, pinpointing the essentially uneven nature of semi-colonialism over mainland and littoral geographies. Imperial shipping power should be foregrounded in the British colonial project, but maritime suzerainty and Liverpool’s imperialism of urbanization ultimately failed to extend very far from the waterfront in informal empire’s “lumpy spatiality”. China’s enclave colonialism lacked the direct linkages to the interior forged by European steamship lines in southern Africa or South India and mapped by Hyslop and Davies respectively in this Special Issue. There was some co-constitution of colonial urbanization by German industry and shipping in South Africa, and Afrikaner nationalism and settler self-government constrained British maritime power-projection. But the Boxer intervention in China did not confirm the same level of British geopolitical primacy as the coterminous Boer War, and, in port development, Portugal or Spain’s proxy, sub-imperialism was absent. Likewise, in southern India, the EIC’s territorial conquests were not matched by Britain’s aggrandizement after the Opium Wars.

Pudong-commitment notwithstanding, Blue Funnel looked over its shoulder in treaty-port China from the 1890s. The search for new supply-lines was a strategy to reduce political risk given asset concentration in unpredictable, unstable China (Hyde, 1957, pp. 128–129). B&S’s comprador Zheng Guanying became an advocate of “commercial warfare” against the treaty powers (Bickers, 2020, p. 69; Halsey, 2015, pp. 201–202), and, as early as 1906, Robert Hart, whom it will be recalled hosted Richard Holt in Beijing during 1893, predicted “Chinese supremacy will be felt and will grow in form and fact, and the foreigner will die out” (Brunero, 2006, p. 19). Through metropolitan interurban competition, meanwhile, Blue Funnel fretted about the punitive settlement imposed upon post-insurgency China, reflecting London’s financial interests rather than Liverpool’s maritime-cum-commercial concerns. Coloniality was circumscribed, moreover, in metropolitan Liverpool, revealed by Blue Funnel’s dependence upon overseas-Chinese brokers for its (albeit asymmetrical) labor regime, while, in its interethnic mix, Liverpool’s Chinatown was less segregated and demarcated than presumed (Craggs & Loh Lynn, 1985; Wong, 1989, p. 3). An historicized analysis of both

manifestations of, and limitations on, informal empire should, therefore, make urban geographers more cognizant of the constraints on overseas maritime power-projection – not least, given resistance to the alleged “neocolonial” impulses of China’s current BRI (Apostolopoulou et al., 2024, pp. 1103, 1107; and Apostolopoulou’s contribution to this Special Issue).²

Notes

1. Hence, Richard Holt disapproved of immigration controls in the Netherlands East Indies but appreciated (reluctantly) that because “anti-Chinese feeling” was “shared by America & Australia we can hardly throw stones at the Dutch” (Holt, 1892–1893). Contravening “doctrines of freedom of movement and reciprocity of treaty rights” (Lake & Reynolds, 2008, p. 20), Swire’s plans for trans-Pacific expansion from the 1870s through shipping Chinese migrants were “scuppered” by the Anglosphere’s increasingly racist immigration regulation (Bickers, 2020, pp. 158–161).
2. Toh (2025), for example, characterizes contemporary China a “semi-empire”, but, in synthesizing existing literature, highlights host-regime agency, political risks, and fragmented and uncoordinated Chinese institutions, balancing asymmetries and containing the imperialism of BRI port-development across Africa and South/Southeast Asia.

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