

## THE MONROE DOCTRINE (1823): ORIGINS, PRINCIPLES AND EFFECTS

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**Abstract:** This article presents the birth, content and effect of the Monroe doctrine (1823). The first part presents an overview of the origin of the Monroe doctrine from the Napoleonic War to the declaration of the President Monroe in 1823. The next section of the article focuses on the content of the doctrine that was presented in the Congress by Monroe, especially its basic principles. The final section provides information about the reactions of European and Latin American countries for this message. By analyzing the correspondences, declarations and other material sources, the article contributes to the clarification of the Monroe doctrine as an important part of diplomatic history during Founding Fathers Era of the United States.

**Key words:** Monroe; doctrine; the United States; Great Britain; Latin America.

### 1. Introduction

Nearly half a century since independence, in 1823, President of the United States James Monroe declared to the world the message known as the foundation of the Monroe Doctrine. This declaration affirmed the strong message of the United States in foreign policy<sup>1</sup>. The principles stated by Monroe have led the United States to play a major role in the world's foreign affairs<sup>2</sup>.

### 2. The origins of the Monroe doctrine

Napoleonic War (1803-1815) defeated Spain. This created a golden opportunity for the Spanish colonies in South America to gain independence<sup>3</sup>. After this war, the Spanish empire in the Western Hemisphere disintegrated. Under the support of France, the colonies which wanted to break away from Spain formed a

<sup>1</sup>James Monroe (1758-1831) was a politician, the fifth President of the United States from 1817 to 1825. Prior to becoming President of the United States, Monroe served in many important government positions such as Governor and Senate of Virginia, Ambassador of the United States to Great Britain and France, Secretary of State, Minister of Ministry of War. He was one of the Founding Fathers Era (Levy, 2005).

<sup>2</sup>In the Proclamation of Neutrality (1793) and George Washington's Farewell Address (1796), the United States affirmed its stance on foreign policy, but it was Monroe's message that US foreign policy really came into the world's concerns (Burgan, 1912).

<sup>3</sup>The Napoleonic Wars were a series of conflicts between France under the commander of Napoleon Bonaparte with a number of European nations from 1799 to 1815 (Schneid, 1913).

Argentina, Peru, Mexico (Hamilton, 2017: 10-11), while the European authorities wanted to build monarchy in these countries. They thought that giving people the right to choose their leader will destroy the power of the monarchy. European countries, especially the Holy Alliance founded in 1815, intended to restore the old Spanish colonies (Jones, 1894: 5-7). For the Spanish, they also wanted to restore colonies in North America.

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republican government themselves like the United States. After 1815, some Latin American countries declared their independence from Spain such as

European countries also wanted to help Spain to do that. They would help Spain by sending troops to fight against the colonies. Therefore, it would be a challenge for the colonies that had just gained independence to defend it (Alagna, 2004: 5-6). Americans worried that, South America would not be able to keep its independence from European countries (Burgan, 2007: 4-5).

After the war of 1812, two other European nations, Russia and France, became Monroe's preoccupations. First, Russia made clear that they wanted colonial possession in North America<sup>4</sup>. In fact, Russia had taken control of Alaska and wanted to expand further to the Southwestern part of the Pacific where the United States had claimed its suzerainty. On October 4th, 1821, Alexander I issued a decree unilaterally declaring the expansion of the South-Western Pacific and forbidding foreign vessels to use water within 100 Italian miles of the coastline (Sexton, 1978: 49). The United States and Great Britain were fierce because the two countries had previously announced the territorial division mentioned in the Tsar's decree (Lawson, 1922: 120). Even some of the places declared by Russia had long belonged to Great Britain and the United States (Treaty of Amity, Settlement, and Limits Between the United States of America and His Catholic Majesty). According to

laws, meanwhile Secretary of State, John Quincy Adams claimed with Baron de Tuvill, Minister of Russia in Washington as follows:

“We should contest the right of Russia to any territorial establishment on this continent, and that we should assume distinctly the principle that the American continents are no longer subjects for any new European colonial establishments” (Adams, 1874: 163).

At this time, in the Congress of Troppau, held in October and November 1820, the Holy Alliance affirmed its right to ban any revolutionary movements in Europe<sup>5</sup>. France acted on Troppau's principle when joining with Spain to ban constitutional monarchy and restore Ferdinand VII's monarchy in April 1823 (Monroe, 1896: 11). This was a warning message for the Washington administration that the Spanish colonies in the Americas might be the next target of the Troppau doctrine. This action of France made the United States anxious. This was based on the fact that France was one of the continental powers which most interested in South America. However, there was a conflict in building views and policies of internal France at this time. French capitalists wanted to expand to the Latin American market for the commerce, but they did not have the authority to make decisions in the policies' implementation. While in contrast, the French parliament decided to establish an independent monarchy in the Bourbon dynasty in the New World (Perkins, 1922: 210).

<sup>4</sup>Alaska is said to have been discovered by the Russians in 1648. On the second trip of Vitus Bering to Alaska in 1741 Alaska, it was claimed to be Russian. By 1784, the first European settlement was established by the Russians at Three Saints Bay (Naske, Slotnick, 1987), (Ritter, 1993).

Article III of Ghent Treaty in 1818, Britain and the United States announced, “It is agreed that any country may be claimed by the Party on the West Coast of the Stony Mountains” (British-American Diplomacy: Convention of 1818 between the United States and Great Britain). Both Britain and the United States were opposed to the Tsar's declaration. Great Britain particularly considered it as a contradiction to national

<sup>5</sup>Congress of Troppau was a meeting of the Powers of the Holy Alliance taking place in Troppa (today's Czech Republic). Participants were Francis I of Austria, Alexander I of Russia, Fredrick William I of Prussia. At the conference, a statement of intent to take collective action against the movement of revolutions was signed on November 19, 1820 which is known as the Troppau's principle (Congress of Troppau).

British Secretary of the Ministry of Foreign Affairs, George Caning also noticed the danger of French intervention in Spain and worried about the future of the Spanish colonies in the Americas (McGee, 1951: 233). Britain did not want the colonies in America to reconnect their old relationship with Spain. The rise of trade relations with South American countries at this time was the biggest reason for British attitudes against

the reinstatement of Spanish control. It was because of this that Great Britain supported American recognition for the new American states (Craven, 1957: 323). Concerning about Russia's territorial ambitions on the north western coast of North America and France in South America, George Canning, the British Secretary of the Ministry of Foreign Affairs proposed a joint statement of United States - British on the prohibition of further colonization in Latin America<sup>6</sup> on October 9, 1823. When Canning's proposal was made, US Secretary of State John Adams was the strongest opponent (Ford, 1902: 28-52). Adams argued and persuaded the Cabinet that the United States should adopt an independent policy. Adams thought that a separate US policy statement on blocking European intervention in South America could be as effective as the joint statement. He wanted to preserve the traditional American policy with the goal of preventing European intervention (Lawson, 1922: 126).

<sup>6</sup>Canning proposed the terms of the joint British-American joint statement that consisted of five principles: 1). We conceive the recovery of Colonies by Spain to be hopeless; 2). We conceive the question of the recognition of them, as Independent States, to be one of time and circumstances; 3). We are, however no means disposed to throw any impediment in the way of arrangement between them, and the mother country amicable negotiation; 3). We aim not at the procession of any portion of them ourselves. 5). We could not see any portion of them transferred to any other power, with indifference (Nolan, 2007: 50).

Before making the important decision, Monroe sent a letter asking for advice from two of his predecessors, Thomas Jefferson and James Madison who were figures of the Founding Fathers Era<sup>7</sup>. In his letter to Thomas Jefferson, Monroe expressed his concern about the profound British intentions on American colonies when the two countries entered into a joint statement.

“We would view an interference on the part of the European powers, and especially an attack on the Colonies, by them, as an attack on ourselves, presuming that if they succeeded with them, they would extend it to us” (To Thomas Jefferson from James Monroe, 17 October 1823).

However, responding to Monroe's letter, Jefferson supported cooperation with the British. He said that Britain was the country that could hurt the United States more than anyone else. However, when Britain was on the US side, the United States did not need to be afraid of the world. Moreover, the United States should respect the friendly relationship and a joint struggle would be an opportunity for the United States and Britain to come together in a relationship (Ford, 1899: 277). Similarly, Madison also advocated a joint statement with Britain. He said that Britain's policy, though, was based on different calculations with the United States. However, the goal for cooperation was close to the desired goal of the United States. With that cooperation, the United States would have nothing to fear from the rest of Europe. That cooperation had a basis for success and he believed that the United States should follow the British proposal (Gaillard, 1910: 157). The European powers' intervention in the American continent had raised a challenge, requiring Monroe to take steps to prevent such movements (Inman, 1921: 636).

<sup>7</sup>Founding Fathers Era starts with the first president George Washington (1789-1797), the second is John Adams (1797-1801), the third is Thomas Jefferson (1801-1809), the fourth is James Madison (1809-1817) and the last is James Monroe (1817-1825). However, according to R.B. Morris, the following seven figures as the key Founding: Alexander Hamilton, John Adams, Benjamin Franklin, John Jay, Thomas Jefferson, James Madison and George Washington (Morris, 1973).

Historically, neutral and non-interference were the first principles of the US foreign policy since independence. As early as 1783, the United States adopted a policy of isolation and declared its intention to leave Europe (Morison, 1924: 29). On the basis of the first principle, Jefferson added another which stated that Europe must leave the Americas out of its concern (Schellenberg, 1934: 2). At the time of the founding of

the United States, the US foreign policy was based on two basic foundations: the Proclamation of Neutrality on November 4, 1793<sup>8</sup>, and George Washington's Farewell Address dated September 17th, 1796<sup>9</sup>. These two statements established the fundamental principles of the US foreign policy: not to interfere in the external affairs of European powers and to avoid participating in the conflicts in these countries (The Proclamation of Neutrality 1793). The United States would also not intervene in conflicts on the European continent or parts

<sup>8</sup>In the Proclamation of Neutrality, Washington wrote: "They should with sincerity and good faith adopt and pursue a conduct friendly and impartial toward the belligerent Powers (...) and I do hereby also make known, that whatsoever of the citizens of the United States shall render himself liable to punishment or forfeiture under the law of nations, by committing, aiding, or abetting hostilities against any of the said Powers, or by carrying to any of them those articles which are deemed contraband by the modern usage of nations, will not receive the protection of the United States, against such punishment or forfeiture; and further, that I have given instructions to those officers, to whom it belongs, to cause prosecutions to be instituted against all persons, who shall, within the cognizance of the courts of the United States, violate the law of nations, with respect to the Powers at war, or any of them" (The Proclamation of Neutrality 1793).

<sup>9</sup>In the Farewell Address, Washington declared that "our detached and distant situation invites and enables us to pursue a different course. If we remain one people under an efficient government, the period is not far off when we may defy material injury from external annoyance; when we may take such an attitude as will cause the neutrality we may at any time resolve upon to be scrupulously respected; when belligerent nations, under the impossibility of making acquisitions upon us, will not lightly hazard the giving us provocation; when we may choose peace or war, as our interest, guided by justice, shall counsel" (George Washington's Farewell Address 1796).

that acted as part of Europe beyond the United States' own interests. Adams also said that the nature of US intervention in European countries was different from that of European countries' intervention in the Americas<sup>10</sup>.

Besides the principle of neutrality, the idea of isolation, no involvement and the principle of the two

hemispheres were also an ideological basis for forming the Monroe Doctrine. This thought originated in the early period of the American formation. Migrants to the North American colonies were mostly people with a dislike for European dynasties, especially Great Britain. Most of them said that political regimes in European dynasties at this time were an injustice. That situation forced them to migrate to new lands. As a result, colonial citizens wanted to stay away from anything related to Europe. After declaration of independence from the mother country, the American political future was not guaranteed due to the effects of this war. Immigrants from European countries had seen the wars between European countries as the Seven-Year War (1756 - 1763), so they wanted to separate from the other hemisphere to have the opportunity to build a new republic.

In addition, before becoming President in 1817, Monroe had held many important positions in the American administration. He was a person with a deep understanding of Europe due to the inter-ministerial positions of European ministers and the signing of treaties. Therefore, Monroe inherited the ideas of American leaders, understanding the goals of the US policy. That was a basis for Monroe to develop his own doctrine.

At this time, the United States wished to implement policies to intervene in Latin America. For the United States, this was an extremely important political-geographic position. In terms of geographical location, Latin America is too close to the United States. If European countries occupied it, this would

<sup>10</sup>Adam explained that "the ground that I wish to take is that of earnest remonstrance against the interference of the European powers by force in South America, but to disclaim all interference on our part with Europe; to make an American cause, and adhere inflexibly to that" (Humes, 1992: 34), (Parson, 2001: 152).

threaten America's interests and security. From an economic perspective, the desire to seek markets and supply raw materials for the development of the American industry since the beginning of the nineteenth century is a factor for America. Moreover, the United States is a country that was founded late, without colonies. Therefore, Latin American countries

that have just recently become independent are one of the most important areas for the United States. In terms of politics - military, Latin America is part of the policy of expanding US influence outside. Latin America will be the first area to assert American influence and power. At the same time, with a strategic position in the South of the United States, separate from other areas by natural boundaries of the Atlantic and the Pacific Ocean, isolated from Europe, the United States will be a conditional country. The most beneficial to expand the influence here. If the US establishes fleets and military bases in Central America, it could base on that to control the whole of America and look at the Pacific Ocean.

In the context of the potential for interference from European countries and the pressure from the United States government, President Monroe announced the 7th annual presidential message on December 2nd, 1823. This statement laid down the foundations for the later Monroe Doctrine.

### **3. The principles of the Monroe doctrine**

The content of the Monroe Doctrine focused on the following principles. First, European nations were not to consider any part of the American continent as an object of colonialism. It then issued a statement stating the differences between countries in the Western Hemisphere and those in Europe. Finally, Monroe stated that the United States would neither interfere in any European affairs nor accept any interference from European countries to the American continent. The two fundamental principles identified as crucial from the Monroe's statement were that the American continent was not considered as a target for future colonization by any European powers and the principles of two hemispheres.

The first simple objective of the Monroe Doctrine was to prevent any interference by foreign powers from entering the United States of the two continents in relation to the Russian claim in the north western part of the Americas and European countries' intention of intervention. The powers were originally identified as European powers (Reid, 1915: 13). The declaration stated as follows:

“In the discussions to which this interest has given rise and in the arrangements by which they may

terminate the occasion has been judged proper for asserting, as a principle in which the rights and interests of the United States are involved, that the American continents, by the free and independent condition which they have assumed and maintain, are henceforth not to be considered as subjects for future colonization by any European powers” (Monroe Doctrine, December 2, 1823).

The language presented in this message was intended to indicate that the continent had been recognized as an independent entity. The United States had established a protection for other states of the Americas, but it was also self-defensive, because the United States had vested its interests and benefits ([35] The Monroe Doctrine). In other words, Monroe's statement was understood that interference in independent sovereignty and interference with continental American issues was not permitted for European powers, but legal for the United States. The essence of this goal was to make “America belongs to Americans”. Secretary Bayard said, “The United States proclaimed themselves the protector of the western world in which she was the strongest Power” (Chester, 1914: 20).

“In the next paragraph, President Monroe pointed out the differences in the political system of the Americas versus the powers of Europe. At this time, American countries gained independence. The republican regime of these countries was different from European countries. The doctrine of Monroe emphasized this to prevent the intention of restoring the monarchy or the dominance of the European monarchy in these countries.

The political system of the allied powers is essentially different in this respect from that of America...we should consider any attempt on their part to extend their system to any portion of this hemisphere as dangerous to our peace and safety” (Monroe Doctrine, December 2, 1823).

The declaration also states that, with the Americas which had declared independence, in principle, their independence would be recognized. The United States did not accept any intervention for the purpose of suppressing them, or controlling their destiny by any European power. Interventions were considered to be

signs of unfriendly treatment for the United States. Arguing for the opinion of unity in the objective of the statement, Monroe raised the case of Spain.

“In the war between those new Governments and Spain we declared our neutrality at the time of their recognition, and to this we have adhered, and shall continue to adhere, provided no change shall occur which, in the judgement of the competent authorities of this Government, shall make a corresponding change on the part of the United States indispensable to their security” (Monroe Doctrine, December 2, 1823).

By contrast, Monroe claimed, the United States would not have any interference in the present colonies of any European power.

Our policy in regard to Europe, which was adopted at an early stage of the wars which have so long agitated that quarter of the globe, nevertheless remains the same, which is, not to interfere in the internal concerns of any of its powers; to consider the government de facto as the legitimate government for us; to cultivate friendly relations with it, and to preserve those relations by a frank, firm, and manly policy, meeting in all instances the just claims of every power, submitting to injuries from none. But in regard to those continents circumstances are eminently and conspicuously different (Monroe Doctrine, December 2, 1823).

In fact, the Monroe Doctrine was not pure isolationism but a treatise that divides the area of influence, dividing the US market. Americans seemed to want to build a privileged relationship with the Caribbean and Central America, but in fact, that was the beginning of a real intervention policy. This is explained by the fact that in this period, the US was much weaker than both the world and the force compared to other powers in Europe, especially Britain and France. Therefore, the United States can only implement a policy of expansion of regional influence without the intervention of European powers.

#### **4.Domestic and international responses to Monroe doctrine**

At its inception, the Monroe Doctrine received the accolade of American society. Monroe's statement was like an expression of nationalism, strength and independence of a young but brave nation, which could stand up against the

British Empire and other European colonists. However, the effect of this statement on the international or the response from other countries was negligible (Krawiecka, 2011: 57).

In the United States, Monroe claims also received some debates over the true authorship of these claims. Many historians pointed out that the Secretary of the Ministry of Foreign Affairs, Canning, was the author of the Monroe Doctrine. However, a part of historians recognized Canning's contributions to the promotion of the rise of this doctrine but they denied his role as an author. Others suggested that John Quincy Adam, the US Secretary of State, was the true author behind this statement. Historian Samuel Flagg Bemis in 1949 stated that Adams was primarily responsible for the Monroe Doctrine and the US foreign policy. This view was also acknowledged by W.C. Ford. However, some historians denied this. They claimed that Adams was just the one who gave the concept of the difference between the two worlds or the developer of the Monroe doctrine rather than the real author (Pastusiak, 1997: 302-303).

In Latin America, Monroe's statement was well received. In Colombia, Monroe's statement was an opportunity for this Republic. Since independence of 1821, the Colombian government had feared the restoration of the Spanish throne of Ferdinand VII. Just as Monroe's message spreading to Columbia, it was quickly made public through Vice President Francisco de Paula Santander's *la Gaceta de Colombia*. Santander also sent a message to Secretary of State Adams expressing his joy in receiving the message, his appreciation for the doctrinal author and the US government. He even went as far as proposing a coalition between the United States and Colombia to uphold the principles of the Monroe Doctrine (Inman, 1921: 641). An extract of Monroe's message was also published in the city of Caracas. The newspaper claimed that Monroe's message had received a great deal of attention from South American states (Robertson, 1915: 81-83). In Brazil, after declaring independence from Portugal on 26 May 1824, a special envoy was dispatched to receive independent recognition from the United States. On January 27, 1825, Brazil proposed an alliance between the United States and Brazil and invited other South American states to join. Rebello, a Brazilian envoy to the United States, said the suggestion

came from the point in Monroe's statement that any European power interference with new states in the Americas would be confronted with the United States. He expressed concern that European countries would be planning to help Portugal seize again the lost Portuguese colony (Robertson, 1915: 95).

Similar to the situation in South American countries, President Monroe's message of December 2nd, 1823 received great interests in England, France, Spain and Austria. In England, the first reports of Monroe's message appeared in the Times and the Courier in London on 26 and 27 December 1823. The Courier newspaper described Monroe's message as "a bold and manly notice to the Continental Powers" (Robertson, 1912: 546-548). While in Parliament, the views of Parliament members about Monroe's statements were different. Some said that the South American problem had been solved by the United States, while others expressed opposition to Monroe's claims, particularly Canning's views regarding colonization by the north western coast of North America (Robertson, 1912: 548-550). From England, Monroe's message was followed by a deep interest in France. As soon as they arrived in France, newspapers such as Le Constitutionnel, the Time, Journal des Debats and Le Courier Française saw Monroe's message as a topic of discussion. The newspapers criticized the contradiction in Monroe's statement, one of which was the principle of non-interference and the Northwest coast of the Americas.

In Spain, Monroe's message was transmitted in January 1824. The content of the message, especially those related to the American view of the Spanish colonies in the Americas, attracted a part of the Spanish government's officials. They sought to collect information, explanation of Monroe's message regarding states recognized independently by Spanish authorities in the Americas (Robertson, 1912: 546-557). Among other countries, Austria was the strongest opposition to Monroe's claims. Austria's Prince Metternich expressed anger at Monroe's claims. He saw this statement as a new act of American rebellion (Herring, 2010: 156).

At the time of its birth, Monroe's statement was lack of practicality. By 1845, James K. Polk added and brought this theory into practice. The interest of Britain and France in Texas, Oregon and the expansion of

British influence in Latin American countries had awakened Americans to the prevention of the British influence. James Polk, a territorial extensionist, said that the Monroe Doctrine became the longstanding foundation of the US foreign policy, warning the interference of other European nations with the problem of America (Jayapalan, 1999: 48). Only until after 1870, the Monroe doctrine became popular as the United States emerged as a world power. At this time, the Monroe doctrine was recognized and had a greater influence ([50]Monroe Doctrine).

## 5. Conclusion

The Monroe doctrine was the first doctrine in the American diplomatic history since the war of independence (1775-1783). The doctrine identifies fundamental issues of the foreign policy of the United States which asserts American's position in the problems of the world, especially in Latin America. Since the Monroe message, this doctrine has drawn attention to countries, especially European and Latin American countries. The Monroe Doctrine played an important role in the history of US territorial expansion, becoming the basic principle of US foreign relations.

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## HỌC THUYẾT MONROE (1823): NGUỒN GỐC, NGUYÊN TẮC VÀ TÁC ĐỘNG

**Tóm tắt:** Bài viết này trình bày về sự ra đời, nội dung và tác động của học thuyết Monroe (1823). Phần đầu tiên trình bày tổng quan về nguồn gốc của học thuyết Monroe từ chiến tranh Napoléon đến tuyên bố của Tổng thống Monroe năm 1823. Phần tiếp theo của bài viết tập trung vào nội dung chứa đựng trong thông điệp của Monroe trình bày trước Quốc hội, đặc biệt là các nguyên tắc cơ bản của nó. Phần cuối cùng cung cấp thông tin về phản ứng của các nước châu Âu và Mỹ Latinh đối với những tuyên bố nêu trên. Trên cơ sở khai thác các thư tín, tuyên bố và nguồn tài liệu khác, bài viết góp phần vào làm rõ các vấn đề của học thuyết Monroe như là một phần quan trọng của lịch sử ngoại giao Hoa Kỳ trong thời kỳ lập quốc.

**Từ khóa:** Monroe; học thuyết; Hoa Kỳ; Anh; Mỹ Latinh.