CHAPTER 27

Empire and Expansion, 1890–1909

# focus questions

1. What were the main reasons for America turning outward (i.e., becoming an international or global power)?

2. Describe the biggest challenges facing America with the acquisition of island territories?

3. Explain the main issues in the election of 1900. What change in focus occurred from the previous election?

4. What are the main features of Teddy Roosevelt’s Big Stick policy and the Roosevelt Corollary?

5. In what ways did the events in China and Japan force America to take on a more international or global attitude?

# Chapter Themes

**Theme:** In the 1890s, a number of economic and political forces sparked a spectacular burst of imperialistic expansionism for the United States that culminated in the Spanish-American War—a war that began over freeing Cuba and ended with the highly controversial acquisition of the Philippines and other territories.

**Theme:** In the wake of the Spanish-American War, President Theodore Roosevelt pursued a bold and sometimes controversial new policy of asserting America’s influence abroad, particularly in East Asia and Latin America.

chapter summary

Various developments provoked the previously isolated United States to turn its attention overseas in the 1890s. Among the stimuli for the new imperialism were the desire for new economic markets, the sensationalistic appeals of the yellow press, missionary fervor, Darwinist ideology, great-power rivalry, and naval competition.

Strong American intervention in the Venezuelan boundary dispute of 1895–1896 demonstrated an aggressive new assertion of the Monroe Doctrine and led to a new British willingness to accept American domination in the Western Hemisphere. Longtime American involvement in Hawaii climaxed in 1893, in a revolution against native rule by white American planters. President Cleveland temporarily refused to annex the islands, but the question of incorporating Hawaii into the United States triggered the first full-fledged imperialistic debate in American history.

The splendid little Spanish-American War began in 1898 over American outrage about Spanish oppression of Cuba. American support for the Cuban rebellion had been whipped up into intense popular fervor by the yellow press. After the mysterious *Maine* explosion in February 1898, this public passion pushed a reluctant President McKinley into war, even though Spain was ready to concede on the major issues.

An astounding first development of the war was Admiral Dewey’s naval victory in May 1898 in the rich Spanish islands of the Philippines in East Asia. Then in August, American troops, assisted by Filipino rebels, captured the Philippine city of Manila in another dramatic victory. Despite mass confusion, American forces also easily and quickly overwhelmed the Spanish in Cuba and Puerto Rico.

After a long and bitter national debate over the wisdom and justice of American imperialism, which ended in a narrow pro-imperialist victory in the Senate, the United States took over the Philippines and Puerto Rico as colonial possessions. Regardless of serious doubts about imperialism, the United States had strongly asserted itself as a proud new international power.

America’s decision to take the Philippines aroused violent resistance from the Filipinos, who had expected independence. The brutal war that ensued was longer and costlier than the Spanish-American conflict.

Imperialistic competition in China deepened American involvement in Asia. Hay’s Open Door policy helped prevent the great powers from dismembering China. The United States joined the international expedition to suppress the Boxer Rebellion.

Theodore Roosevelt brought a new energy and assertiveness to American foreign policy. When his plans to build a canal in Panama were frustrated by the Colombian Senate, he helped promote a Panamanian independence movement that enabled the canal to be built. He also altered the Monroe Doctrine by adding a Roosevelt Corollary that declared an American right to intervene in South America.

Roosevelt negotiated an end to the Russo-Japanese War but angered both parties in the process. Several incidents showed that the United States and Japan were now competitors in East Asia.

# developing the chapter: suggested lecture or discussion topics

* Explain more fully the different views of the causes of imperialism, including the idea of expansion as a way to create new economic markets. Show how these factors affected the Spanish-American War and the decision to take the Philippines.

REFERENCE: Walter LaFeber--, *The New Empire* (1963).

* Analyze the complicated mix of idealism and realism in the Spanish-American War, and explain why some Americans were deeply concerned about the oppressed Cubans while others were more interested in the war as an occasion to demonstrate and spread America’s new national power abroad.

REFERENCE: Ernest May, *Imperial Democracy* (1961).

* Demonstrate how the political impact of the war was much greater than the impact of the actual chaotic fighting. The focus might be on the ways in which the war raised up new heroes (Theodore Roosevelt and George Dewey) and created a new sense of the United States as a great world power.

REFERENCE: David Trask, *The War with Spain in 1898* (1981).

* Consider why the question of whether to hold on to the Philippines was so controversial and why the pro-imperialist forces were able to win by a narrow margin. The discussion might center on both the short- and long-term consequences of the Philippine acquisition.

REFERENCE: H. W. Brands, *Bound to Empire: The United States and the Philippines* (1992).

* Show how the United States after the Spanish-American War was increasingly acting like a great power in world affairs, especially in Asia, and how Roosevelt energetically promoted this involvement despite the traditional belief in American isolationism.

REFERENCES: Marilyn Young, *The Rhetoric of Empire: America’s China Policy, 1895–1901* (1968); Charles E. Neu, *Troubled Encounter: The United States and Japan* (1975).

* Explain why the Philippine-American War was the most serious consequence of the Spanish-American War. Consider the disturbing questions it raised about America’s new international involvements, especially imperial control of a distant, hostile people.

REFERENCE: Richard E. Welsh, *Response to Imperialism: The United States and the Philippine-American War, 1899–1902* (1975).

* Examine Roosevelt’s aggressive determination to build the Panama Canal in relation to America’s growing international assertiveness, particularly in Latin America. Show how American involvement in the Panama coup and the Roosevelt Corollary to the Monroe Doctrine aroused sharp Latin American opposition.

REFERENCE: Richard H. Collin, *Theodore Roosevelt’s Caribbean: The Panama Canal, the Monroe Doctrine, and the Latin American Context* (1990).

* Discuss the role of Asian immigration and the fear of the yellow peril in shaping America’s relations with East Asia in the early twentieth century.

REFERENCE: Alexander DeConde, *Ethnicity, Race, and American Foreign Policy* (1992).

* Examine the relationship between racial ideology and the new imperial attitude of American foreign policy.

REFERENCE: Eric T. L. Love, *Race over Empire: Racism and U.S. Imperialism* (2004).

* Examine the history of American acquisitions; discuss the similarities and differences between these acquisitions with regard to American foreign policy. At what point in American foreign policy does a fundamental shift occur from domestic power to international power?

REFERENCE: Walter Nugent, *Habits of Empire: A History of American Expansion* (2008).

# for further interest: additional class topics

* Examine Teddy Roosevelt as a central character in the events of the chapter: as imperialist advocate, assistant secretary of the navy, Rough Rider, legendary war hero, governor of New York, vice president, and then president. (See boxed quote on page 614.)
* Analyze the yellow press: explain what yellow journalism is, why it had such great appeal and popular impact in the late nineteenth century, how it sensationalized and distorted issues, and how important it was (or was not) in really influencing President McKinley and others.
* Focus on Cuba and America: discuss why, from the pre–Civil War era forward, Americans were concerned with Cuba; how they viewed the Cuban rebels; what issues dominated American debates about Cuban readiness for independence (for example, the Teller and Platt amendments); and what links developed to the subsequent history of American-Cuban relations.
* Consider the Philippines: discuss where they are (point out that most Americans, even government officials, did not know their location in 1898), who the Filipino people were and are, and why the islands have been viewed as strategically and commercially important (especially in relation to China). Discuss the nature of the Filipino rebellion against Spain, which became a rebellion against America. Perhaps tie in the subsequent history of American-Philippine relations.
* Examine Roosevelt’s theory and practice of the big stick in foreign policy, especially in his relations with Latin America.
* Examine the role of American missionaries in shaping U.S. foreign policy in this period, especially in China.
* Take up the question of gender in relation to American foreign policy and American imperialism, particularly the idea that aggressive overseas action was one way for men (including Theodore Roosevelt) to assert their masculinity in an era of growing feminine influence in society and culture.
* Conduct a class debate on a topic such as America Should Retain the Philippines; primary source readings will come from the following book *Opposing Viewpoints in American History—Volume II: From Reconstruction to the Present*, San Diego, CA: Greenhaven Press, 1996. Another good source of debate topics is Larry Madaras and James M. SoRelle, *Taking Sides—Clashing Views on Controversial Issues in American History, Volume II: Reconstruction to the Present*, Connecticut: McGraw-Hill, 2000.
* Show students the following video: *The Century—America’s Time* (ABC Video in association with The History Channel), *Volume I: The Beginning: Seeds of Change*. “In an era of innocence and prosperity, the American landscape is set in motion for a new century of unimaginable change—a time when the promise of electricity, automobiles, moving pictures and air flight was just over the horizon.”
* Have the students read Henry Adams, *The Education of Henry Adams* (1918). Use the book as an example of political and philosophical autobiography. Adams reflects on his search for order and unity in a world that is obsessed with self-destruction and complexity.

# character sketches

## Queen Liliuokalani (1838–1917)

The refusal by Liliuokalani, the native ruler of Hawaii, to accept the white planters’ revolt of 1893, and her eloquent pleas to President Cleveland, helped delay American annexation of Hawaii until 1898. Her devotion to her people and her resistance to white assimilation has made Liliuokalani a romantic symbol of traditional Hawaiian culture down to the present.

She became queen of Hawaii in 1891, at age fifty-two, after the death of her brother, King Kalakaua. She was a conscientious Christian with strong charitable interests, but she also had a disdain for Protestant moralism. Despite her tireless efforts to preserve the power of the monarchy, she was deposed following the 1893 uprising, in which American troops openly aided the rebellious white minority.

A contemporary newspaper described Liliuokalani’s face as “strong and resolute.” She spoke a pure and graceful English, and her voice was musical and well modulated. Throughout her life, she composed beautiful Hawaiian songs, including the famous “Aloha Oe” (“Farewell to Thee”).

**Quote:** “Some of my subjects, aided by aliens, have renounced their loyalty and revolted against the constitution and government of my kingdom. … Upon receiving incontestable proof that His Excellency the Minister of the United States aided and abetted their unlawful movements, and caused United States troops to be landed for that purpose, I submitted to force.” (To President Grover Cleveland, 1893)

REFERENCE: Helena Allen, *The Betrayal of Liliuokalani: Last Queen of Hawaii, 1838–1917* (1982).

## William Randolph Hearst (1863–1951)

Hearst’s sensationalistic yellow journalism and bombastic warmongering in 1897–1898 have long provoked the debatable charge that he was personally responsible for the Spanish-American War—a view to which Hearst himself was willing to subscribe. “You furnish the pictures and I’ll furnish the war,” Hearst allegedly responded to the assertion of artist-correspondent Frederic Remington (who covered Cuba during the war) that Remington had witnessed little evidence of Spanish cruelty. (Although the statement was reported by another correspondent, there is no proof that Hearst ever actually said it.)

A native San Franciscan, Hearst had been raised primarily by his mother and given an elite education, but he was expelled from Harvard (where he worked on the humor magazine *Lampoon*) for a stunt that involved sending chamber pots to professors. In 1887, he used family wealth to take control of the *San Francisco Examiner,*which he turned into a commercially successful paper. In 1895, he acquired the *New York Journal* and entered a fierce circulation war with Pulitzer’s *New York World.* In June 1898, Hearst personally sailed to Cuba, where he helped round up Spanish prisoners while writing headline-grabbing stories.

Ever an extremely flamboyant and controversial figure, Hearst was active in politics and remained a dynamic force in journalism for many decades.

**Quote:** “The journalism that talked was a great advance from no journalism at all. But the future belongs to the journalism that acts.” (1898)

REFERENCES: David Nasaw, *The Chief: The Life of William Randolph Hearst* (2000).

## Theodore Roosevelt (1858–1919)

Although Roosevelt was a great president, a skilled international diplomat, and a gifted writer, it was his brief actions during the Spanish-American War that created the enduring Roosevelt legend the public always loved best: Teddy the Rough Rider charging up San Juan Hill. Roosevelt himself never regretted that these exploits overshadowed his more substantive achievements, because he too loved the image of the rugged hero.

After graduation from Harvard in 1880, Roosevelt began his public life by writing lively works of naval and western history. An assistant secretary of the navy under William McKinley, he pushed for a big navy and expansionism. His famous order to Commodore George Dewey, issued when Secretary of the Navy Long was away for a weekend, led to the American victory at Manila Bay and the conquest of the Philippines, which Roosevelt and his friends strongly desired. Although lacking military experience, Roosevelt used his political connections to obtain his army commission for service in Cuba and, along with writer Richard Harding Davis, effectively promoted the legend of the Rough Riders that made him “the most famous man in America.”

**Quote:** “There comes a time in the life of a nation, as in the life of an individual, when it must face great responsibilities, whether it will or no. We have now reached that time.… The guns of our warships in the tropic seas of the West and the remote East have awakened us to the knowledge of new duties.”

REFERENCES: Edmund Morris, *The Rise of Theodore Roosevelt* (1979); John M. Cooper Jr., *The Warrior and the Priest* (1983).

## John Hay (1838–1905)

Hay was Abraham Lincoln’s private secretary, secretary of state under McKinley and Roosevelt, and a noted poet and historian.

Hay’s uncle’s law office in Springfield, Illinois, was next to Lincoln’s, and Hay’s childhood friend John Nicolay arranged for Hay to become Lincoln’s private secretary, even though Hay was only twenty-three. He performed many personal chores for the Lincolns at the White House and was sometimes awakened by a sleepless Lincoln, who would tell him jokes. Hay and Nicolay later wrote a ten-volume biography of Lincoln that presents the president in a highly favorable light but reflects serious scholarship rather than mythologizing the national hero.

In the 1870s, Hay became a celebrated literary figure. His poetry, such as *Pike County Ballads and Other Pieces,* was quite popular, but his novels were mostly attacks on labor unions. Hay was the closest friend of historian Henry Adams, and the two built adjoining houses across the street from the White House. Hay appreciated Adams’s philosophical distance from politics but could not accept his friend’s dark pessimism about public affairs.

**Quote:** “I need not tell you the lunatic difficulties under which we labor.… All the powers treat us as a central Hello Office, and we strive to please the public. If I looked at things as you do, in the light of reason, history, and mathematics, I should go off after lunch and die.” (Letter to Henry Adams about Open Door policy, 1900)

REFERENCE: Tyler Dennett, *John Hay: From Poetry to Politics* (1933).

## Philippe Bunau-Varilla (1859–1940)

Bunau-Varilla was the French engineer who energetically promoted the Panama Canal and the Panamanian revolution, and negotiated the Hay–Bunau-Varilla Treaty with the United States.

As a young engineering student, Bunau-Varilla had come under the spell of Suez Canal builder Ferdinand Lesseps, and Bunau-Varilla became convinced that his mission in life was to complete Lesseps’s work by building the canal across Panama. Besides distributing stamps showing Nicaraguan volcanoes, he bombarded senators with favorable information about Panama, while carefully concealing the overwhelming problems the French builders had experienced there in nearly twenty years of effort.

He played a key role in fomenting the revolution in Panama, having obtained assurances that the United States would intervene as soon as independence was declared. He wrote the constitution and designed the flag of the new republic, and he gave both to one of the plotters.

**Quote:** “I have been exposed to calumny in my long fight against ignorance and falsehood.… I have served the Republic of Panama, and her interests are coincident with those of the canal. Once the treaty is ratified, I will have fulfilled the pledge I made to myself twenty-three years ago.”

REFERENCE: G. A. Anguizola, *Philippe Bunau-Varilla: The Man Behind the Panama Canal* (1980).

## George Goethals (1858–1928)

Goethals was the American engineer who built the Panama Canal.

Although a career military officer in the Army Corps of Engineers, Goethals never fired a weapon except in basic training. After the first two engineers assigned to the canal job resigned, Goethals was given near-absolute power over the Canal Zone in order to speed up the job.

Besides planning and supervising the construction, he managed over thirty thousand employees and their families, and created social institutions such as jails, courts, hospitals, and so on. He set aside every Sunday morning to hear individual complaints from the workers.

Goethals was a tough, unsmiling, chain-smoking martinet. Someone once asked a family member how Goethals amused himself, and the reply was, “He does not amuse himself.”

**Quote:** “The real builder of the Panama Canal was Theodore Roosevelt. It could not have been more Roosevelt’s triumph if he had personally lifted every shovelful of earth in its construction.” (1919)

REFERENCE: David McCulloch, *The Path Between the Seas* (1977).

# great debates in american history

## Great Debate (1899):

American imperialism. Should the United States become an imperialist power by keeping the Philippine Islands?

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| ***For:*** The pro-imperialists—led by expansionists like Theodore Roosevelt, Henry Cabot Lodge, and Albert Beveridge; some business publications like the *Review of Reviews* and business spokespersons like Mark Hanna; and some religious leaders like the Rev. J.H. Barrows and the Rev. Josiah Strong. |  | ***Against:*** The anti-imperialists—led by writers like William James and Mark Twain; some business spokespersons like Andrew Carnegie; some labor leaders like Samuel Gompers; and some clergymen like the Rev. Charles Ames and the Rev. Henry Van Dyke. |

ISSUE #1: Manifest Destiny. Is overseas expansion, and therefore control of the Philippines, part of the inevitable manifest destiny of the United States?

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| ***For:*** Pro-imperialist Theodore Roosevelt: “Our whole national history has been one of expansion. Under Washington and Adams we expanded westward to the Mississippi. Under Jefferson we expanded across the continent to the mouth of the Columbia.… The same will be true of the Philippines. Nations that expand and nations that do not expand may ultimately go down, but the one leaves heirs and a glorious memory, and the other leaves neither.” |  | ***Against:*** Anti-imperialist Carl Schurz: “Whenever there is a project on foot to annex a foreign territory to this republic the cry of ‘manifest destiny’ is raised to produce the impression that all opposition to such a project is a struggle against fate. The fate of the American people is in their own wisdom and will. If they devote their energies to the development of what they possess within their present limits…their ‘manifest destiny’ will be the preservation of the exceptional and invaluable advantages they now enjoy.…” |

ISSUE #2: Democracy. Would ruling another nation be compatible with basic American ideals of democracy and self-government?

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| ***For:*** Pro-imperialist *New York Tribune:* “Cannibals govern themselves. The half-ape creatures of the Australian bush govern themselves. The Eskimo governs himself, and so do the wildest tribes of darkest Africa. But what kind of a government is it?” |  | ***Against:*** Anti-imperialist Rev. Henry Van Dyke: “How can we pass by the solemn and majestic claim of our Declaration of Independence, that ‘government derives its powers from the consent of the governed’? How can we face the world as a union of free states holding vassal states in subjection, a mighty mongrel nation in which a republic is tied to an empire, and democracy bears children not to be distinguished from the off-spring of absolutism?” |

ISSUE #3: Economic benefit. Is acquiring the Philippines essential for America’s economic health and future trade with Asia?

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| ***For:*** Pro-imperialist *American Wool and Cotton Exporter:* “Annexation is important because the contingencies of our China trade bid fair to be such as to make the Philippines exceedingly valuable to us as a basis for operations in the continent of China.” |  | ***Against:*** Anti-imperialist Carl Schurz: “I agree that we cannot have too many foreign markets. But can such markets be opened only by annexing to the United States the countries in which they are situated?” |

ISSUE #4: Race. Should the dark-skinned Filipinos be brought under the rule of white-skinned Americans?

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| ***For:*** Pro-imperialist *The Textile Record:* “Supremacy in the world appears to be the destiny of the race to which we belong, the most competent governor of inferior races.… The clear path of duty for us appears to be to bring to the people of the Spanish islands in the Pacific and the Atlantic an opportunity to rise from misery and hopelessness to a promise of just government and commercial success.” |  | ***Against:*** Anti-imperialist Henry Labouchère: [A parody of Rudyard Kipling’s “The White Man’s Burden.” See text.]  “Pile on the brown man’s burden  Nor do not deem it hard  If you should earn the rancor  Of those ye yearn to guard.  The screaming of your eagle  Will drown the victim’s sob  Go on through fire and slaughter  There’s dollars on the job.  Pile on the brown man’s burden  And through the world proclaim  That ye are freedom’s agent—  There’s no more paying game!  And should your own past history  Straight in your teeth be thrown  Retort that Independence  Is good for whites alone.” |

REFERENCES: E. Berkeley Tompkins, *Anti-Imperialism in the United States: The Great Debate, 1890–1920* (1970); Richard Welch, ed., *Imperialists vs. Anti-Imperialists* (1972).

# questions for class discussion

1. What were the causes and consequences of the Spanish-American War? Did the results of the war (particularly the acquisition of the Philippines) flow from the nature of the war, or were they unexpected? (See boxed quotes on pages 607, 609, 611, 616, and 620.)

2. How was American expansionism overseas similar to previous continental expansion westward, and how was it different?

3. Was the taking of Hawaii, Puerto Rico, and the Philippines really a violation of fundamental American ideals of self-government and democracy?

4. What were the elements of idealism and realism in American expansionism in the 1890s? How have Americans incorporated both of these seemingly contradictory philosophies in their foreign policy? (See Thinking Globally section on pages 630-631.)

5. Why was the Philippine-American War such a brutal affair, and why is it not as well remembered as the less costly Spanish-American War?

6. Did Roosevelt more often speak softly or use the big stick? Was his approach to foreign policy aggressive or simply energetic?

7. How did the Roosevelt Corollary distort the Monroe Doctrine? What were the consequences of the Roosevelt Corollary for American relations with Latin America? (See boxed quote on page 628.)

8. Was the United States essentially acting as a white, Western imperialist power, or did American democratic ideals substantially restrain the imperialist impulse?

**CONTENDING VOICES: ALBERT BEVERIDGE VS. GEORGE HOAR**

**Questions for Class Discussion**

1. What reasons did Senator Beveridge offer in support of taking the Philippines “forever?”

2. What did Senator Hoar argue would be the end result of the United States becoming an imperial power?

# makers of america: the puerto ricans

## Questions for Class Discussion

1. How has Puerto Rico’s special relationship to the United States made Puerto Ricans unique among all immigrant groups?

2. Compare the experience of Puerto Ricans with that of other Latino immigrants, especially the Mexicans. (See Chapter 40.)

## Suggested Student Exercises

* Examine the continuing debate over Puerto Rico’s relationship with the United States. Consider how Puerto Rican statehood or independence would affect Puerto Ricans in the mainland United States.
* Consider the particularly important role that Puerto Ricans have played in the life of New York City in the twentieth century and the transformations their community has undergone there. Daniel Patrick Moynihan and Nathan Glazer, *Beyond the Melting Pot* (1963) is an older sociological work that examines Puerto Ricans in New York; Virginia Sanchez Korral, *From Colonia to Community: The History of Puerto Ricans in New York City* (1983) is a good study of the evolution of the Puerto Rican community.

# makers of america: the filipinos

## Questions for Class Discussion

1. Compare the Philippine immigration to America with that of the Chinese. (See Chapter 23.) How did American imperial ownership of the Philippines make the Filipinos’ experience different from that of other Asians?

2. Even though more immigrants have come from the Philippines than from China or Japan, it seems that most Americans do not regard Filipinos as they view other Asian immigrants. Why might that be so? Is the awareness of the Filipino presence greater in Hawaii and the West Coast than in other parts of the country?

## Suggested Student Exercises

* Analyze the political history of American-Philippine relations as described in this chapter of the text. Consider its relation to the history of Filipino immigration described here.
* Compare the old Filipino immigration described here with the new post–World War II immigration from the Philippines.

# varying viewpoints

## Expanding the View

* Julius Pratt, *Expansionists of 1898* (1951).

A traditional view of imperialism:

“The Manifest Destiny of the 1840s had been largely a matter of emotion. Much of it had been simply one expression of a half-blind faith in the superior virility of the American race and the superior beneficence of American political institutions. In the intervening years, much had been done to provide this emotional concept with a philosophic backing.… Far-fetched and fallacious as their reasoning may appear to us, it nevertheless carried conviction.… The observation must be made that the rise of an expansionist philosophy in the United States owed little to economic influences.… The need of American business for colonial markets and fields for investment was discovered not by businessmen but by historians and other intellectuals, by journalists and politicians.”

* William Appleman Williams, *The Tragedy of American Diplomacy* (1959).

A revisionist view of imperialism as a product of economic expansionism:

“Men like McKinley and other national leaders thought about America’s problems and welfare in an inclusive, systematized way that emphasized economics. Wanting democracy and social peace, they argued that economic depression threatened those objectives, and concluded that overseas economic expansion provided a primary means of ending that danger. They did not want war per se, let alone war in order to increase their own personal fortunes. But their conception of the world ultimately led them into war in order to solve the problems in the way that they considered necessary and best.”

# Questions for Class Discussion

1. Which of these two interpretations better explains (a) the war with Spain, (b) the decision to keep the Philippines, and (c) the U.S. involvement as a great power in world affairs?

2. Which historian would see American imperialism more as inevitable, and which would see it more as a matter of choice?

3. Which of the two would judge American imperialism more harshly as a violation of moral principles and a threat to American democracy?