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## In for a penny, in for a pound: The trouble with offshore balancing and why it matters that “1917” was *not* “1941”

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### ABSTRACT

Over the past couple of decades, students of American grand strategy have debated the merits (or lack thereof) of an orientation toward the global balance of power that has come to be known as “offshore balancing.” Its critics hold offshore balancing simply to be another way of expressing the dangerous allure of strategic “restraint,” or even “isolationism.” Its enthusiasts, by contrast, see in it nothing other than the best conceivable grand strategy for America, enabling Washington to avoid the pitfalls of either too little or too much interventionism in global affairs. This article challenges both positions, and argues that the historical record of offshore balancing as an American strategic orientation leads to the conclusion that, far from being a crypto-isolationist grand strategy, it actually betrays close affinities with the so-called “maximalism” to which its champions believe it to be superior.

“1917 was not 1941”

*Galen Jackson*

“[I] ne faut pas confondre 1917 et 1941”

*André Kaspi*

### Introduction: what’s in a truism?

It would be hard to dispute the truth of the above two epigrams, testifying as each does to an obvious calendric reality. That reality is the gap of two-dozen years separating the two most momentous events in America’s twentieth-century diplomatic experience, such that they should never be treated as if they represented a single temporal entity. Those events were the decisions to intervene militarily in the European and global balance of power in the First World War (1917) and then again in the Second World War (1941). Still, if the epigrams speak to an uncontested chronological reality, they do much more than that: they highlight a consequential set of issues regarding the debate over America’s “grand strategy” – past, present, and future. That debate, as I will show in these pages, turns on the deeper significance of the above

truism, advanced by both Galen Jackson and André Kaspi.<sup>1</sup> It is not simply a question of whether the two dates symbolize a single *conceptual* entity, which as we will soon see, some scholars – though not Jackson and Kaspi – maintain they do. But if it turns out that conceptual “1917” really is *not* conceptual “1941,” which of course is the thrust of their epigrams, then there are surprising implications for the future of American grand strategy.

Rightly considered as foundational in the evolution of American grand strategy, these benchmark years have two sets of implications for the debate over “offshore balancing.” The first set involves important empirical considerations stemming from the historiography of the respective interventions of 1917 and 1941. The second concerns whether there are “lessons” to be gleaned from the pair of years, when thoughts turn from America’s strategic past, to its present and future.

To some, offshore balancing provides the ideal compass for facilitating the safe passage of the ship of state between the Scylla of too much strategic “restraint” and the Charybdis of too much interventionism.<sup>2</sup> Although there are scholars who seem to think offshore balancing is merely a synonym for restraint, even for isolationism,<sup>3</sup> to its enthusiasts it epitomizes nothing less than the *juste milieu*, which if embraced consistently would enable Washington somehow to skirt the twin perils of too little and too much geostrategic activism. The enthusiasts sense in it the same kind of allure Goldilocks experienced when sampling the last of the three bears’ bowls of porridge – something neither too hot nor too cold, but “just right.” For the offshore balancers, the golden mean of grand strategy is located midway between minimalism and maximalism.

This article argues otherwise and suggests that the problem with offshore balancing is *not*, as is sometimes thought, that it is a grand strategy too minimalist to safeguard America’s interests. The problem is that offshore balancing, if the past is any guide, would in future end up looking virtually indistinguishable from the maximalism it is intended to supplant. It is not just that two benchmark years have less in common than is sometimes thought, because only the latter year can be considered an instance of offshore balancing. More to the point are the consequences that befell America when it opted during the 1940s, for the first time in its history, for offshore balancing: America was plunged, initially, into total war, following which it entered into a decades’-long, successful, struggle to contain its Soviet adversary. If those two were not “maximalist” policy outcomes, then nothing in America’s record of strategic action can be considered maximalist.

In other words, offshore balancing in its first, great, instantiation hardly resulted in any sort of midpoint on a sagacious journey of strategic equipoise. Rather, it constituted the initial and irreversible step along the road to deep geostrategic engagement, a highway whose signage bears testament to the wisdom conveyed in the aphorism, “in for a penny, in for a pound.”

### **3M theory: Mahan to Mackinder to Mearsheimer**

There are two convenient ways we might best theorize this article’s problématique. One way to understand offshore balancing would explore how earlier generations of “geopolitical” scholars wrestled with the relationship between geographical *configuration*

and political outcomes. The second way to acquire situational awareness would be to embed our concept within theoretical confines considered to be offshoots of realism. Those offshoots are those associated with structural realism, and especially a sub-variant thereof known as “offensive” realism.”<sup>4</sup>

As a strategic practice, offshore balancing predates modern IR realism. Even if no one thought to call it by its present name, this form of balancing was already a feature of European diplomatic affairs prior to the twentieth century, when it was most commonly linked with British foreign policy behavior.<sup>5</sup> That behavior put a premium on refraining from permanent involvement in the continental balance of power, in favor of intervention only when and as required by Britain’s interests, and even then by prioritizing, to the maximum extent possible, seapower over land power. The practice of offshore balancing found its first theoretical haven within a precursor to modern realism called geopolitics, which prior to the blossoming of IR as a scholarly field in its own right, represented the “discipline” of world politics.

To the extent that geopolitics, like the IR realism into which its remnants would later be absorbed, had its own canonical sources, they were the theorists Alfred Thayer Mahan and Halford Mackinder. Each believed that geographical configuration “predicted” the kind of power-projection capabilities a state would prioritize, with insular countries specializing in naval assets, and continental ones highlighting terrestrial ones. To be sure, geopolitics, as a *stand-alone* theoretical paradigm in global affairs, long ago passed into relative oblivion, and to the extent it featured at all in Cold War debates in international relations (IR), it was usually as an ideational trace element favored by a few realists (though it did regain popularity among political geographers).<sup>6</sup> Lately, however, configuration hypotheses have received a second wind, as a result of the much-commented “rise” of China as a peer-competitor of the US.

The revival of configuration hypotheses in IR has had one central intellectual figure, John Mearsheimer, who has also been the most prominent theorist of offshore balancing. It is no exaggeration to claim that what both Mahan and Mackinder represented for the theorization of configuration (and for Mahan, offshore balancing) *avant la lettre*, Mearsheimer does for offshore balancing so named. He is today’s “go-to” source for contextualizing this dispensation, primarily because of the way in which he links it to the geographically circumscribed notion of “regional hegemony,” which has been an indispensable conceptual presence in the current debate over offshore balancing.

Regional hegemony, though a crucial supporting element in the theoretical scaffolding of offensive realism, is not, in and of itself, *the* dominant idea of this variant of structural realism. That dominant idea, as expressed in Mearsheimer’s *Tragedy of Great Power Politics*, is that states – or at least the strongest among them – are everywhere motivated by the same desire: to maximize their power.<sup>7</sup> This contrasts with the putative motivating idea of structural realism’s other leading (some say, competing) variant, namely that states are prompted to maximize their *security* rather than their power, the central tenet of the defensive realists – a tenet to which we return later in this article.

As Mearsheimer sees it, the power-maximizing precept is fundamental to, and inseparable from, the logic of offshore balancing. More than this, he claims that offshore balancing has been the optimal grand strategy of the US on four separate occasions over the past century or so. In his recounting of the record of America’s

offshore balancing – its grand strategy *par excellence* – geography plays a central part. This is because all great powers (indeed, all states) seek to survive in the anarchic international system, and if only they could, they would prefer to be so dominant as to become the “global hegemon.” But since global hegemony is, ipso facto, excluded from attainment because of the iron law of power balancing, the best they might hope for is to develop into a regional hegemon. However, even in this spatially constricted understanding of hegemony, geographical realities militate against easy achievability. So difficult is it to acquire the status of regional hegemon, asserts Mearsheimer, that there is only *one* state that has been able to accomplish the feat in recent times. It is the United States, which he says has enjoyed this status for more than a century.

Thus it follows that America’s policymakers must never lose sight of the existential importance of preventing any other great power from joining it in the ranks of regional hegemon, even if that power inhabits some far-away corner of the world. Fortunately, geography has singularly favored America’s special standing. Living in a Western hemisphere it does not have to share with any other great power, and – crucially – protected as it is from great powers elsewhere by vast oceanic expanses to its east and west, the United States has been able to take full advantage of what Mearsheimer insists is the “stopping power of water.”<sup>8</sup> Nonetheless, a favorable geographic setting alone cannot guarantee America’s remaining the planet’s sole regional hegemon. To preserve its monopolistic position, Washington must, from time to time, undertake military interventions in some *other* power’s region. It mounts these interventions most efficiently from “offshore” locales, rather than by enmeshing itself in the continual workings of some other region’s balance of power.

Many scholars disagree. They argue that some state in a far-off region – say, China in East Asia – might also develop into a regional hegemon, yet in so doing *not* present the United States with any insuperable threat, much less one of “existential” nature, putting at risk its very survivability.<sup>9</sup> For Mearsheimer, this is Panglossian. The challenge of some other state’s gaining hegemony in its own geopolitical neck of the woods *has* to be considered existential, for two reasons. The first is that a regional hegemon elsewhere might become tempted to trespass in America’s *chasse gardée* – in effect it “might grow powerful enough to roam into the Western Hemisphere.” The second, more important, reason is that even in the event that the potential peer competitor stayed put in its own neighborhood, its acquisition of regional hegemony would vastly complicate the task of projecting America’s global power.<sup>10</sup>

So not only is the challenge existential in our own times, avers Mearsheimer, but it is an old and familiar challenge, one with which America’s policymakers have had to grapple ever since the country’s own “rise” to great-power status around the turn of the twentieth century.<sup>11</sup> This existential challenge, he tells us, has elicited, on *four* occasions over the past hundred or so years, that wisest of all strategic responses: offshore balancing. Those occasions were once in 1917, *twice* in 1941 (Mearsheimer double-counts this year because he believes that US grand-strategic motivation led to two discreet geographical interventions at that time, one in Europe against Germany, and one in Asia against Japan), and once more during the long years of the Cold War. There are two problems with this way of framing the intervention decisions on those four [*sic*] occasions, as representing rational and calibrated responses to someone else’s attempt to achieve regional hegemony.

First is a conceptual matter, for it is unclear to what extent even the geographically delimited articulation of hegemony makes any sense. Although few IR scholars seem capable of refraining from tossing around what Perry Anderson calls the “h-word”<sup>12</sup> with the *brio* of a short-order chef bombarding a plate of burger and fries with salt, we need to be clear about what hegemony is supposed to mean. On this question, the IR scholars are very much divided, some interpreting it to connote nothing less than “control over outcomes” (i.e. influence), while others employ it more modestly as a stand-in for a different word, “leadership.” It matters greatly, especially if one takes hegemony in its *regional* context as seriously as Mearsheimer does, what sense of the word is being employed.

Hence the difficulty: if control over outcomes is hegemony’s defining characteristic, it is hard to see how even the US can be considered a regional hegemon. It is certainly the greatest power in both the Western hemisphere and the world, so it might be said to enjoy primacy. But to imagine America exerts control over outcomes throughout the Western hemisphere requires some strenuous cognitive calisthenics, because if America really did have such control in its own neighborhood, its Latin American “near abroad” would look decidedly less intractable than it has routinely seemed to be ever since the US emerged as an undisputed great power. Let us cite just a few items, from what could be a lengthy list. Can anyone imagine, say, that an America truly capable of decreeing outcomes in “its” region would desire today’s Mexico – as opposed to some counterfactual Mexico – as its southern neighbor? Would it want today’s Cuba ninety miles off the Florida coast? Would it be happy with Nicolás Maduro’s Venezuela if it could simply will into existence another regime for the Bolivarian republic?<sup>13</sup>

One could of course maintain that those who think of America as a regional hegemon in the weaker sense of the concept, meaning *leader*, have a different geographical focus from Mearsheimer’s in mind, in that they believe it is the transatlantic West rather than the Western hemisphere that has constituted the cynosure of American strategic thought ever since the Second World War. In this context, then, to depict the US as a regional hegemon means nothing either more or less than that it is the preeminent organizer of security and defense cooperation within the North Atlantic alliance, something on full display lately in its rallying of allied support for Kyiv in its war against Moscow.<sup>14</sup> America is the alliance’s undisputed *leader* (though a churl might query why it is necessary to substitute for that perfectly good word, leader, the concept of hegemon, even if only in the weak sense). All of this is to remark that the region of John Ikenberry’s “hegemonic” imaginings<sup>15</sup> is not the region of John Mearsheimer’s, for the latter clearly has a geographical frame that can only be understood by reflecting upon that earlier corpus of theorizing, with which this section of the article began: geopolitics. This is a more important point than is sometimes realized, for reasons I will elaborate upon when we get to the discussion of “1941.”

The second problem with the Mearsheimer version of America’s record as an offshore balancer concerns not so much the concept of regional hegemony as it does the putative relationship between that concept and the empirical record of American interventionism. The grand strategy of offshore balancing *has* acquired a considerable pedigree in American diplomatic practice, even though its labeling has followed from, rather than predated, that practice. But the practice itself really is not as firmly

established as might be imagined, or as Mearsheimer asserts. It dates *not* from American intervention in the First World War, but in the Second. As we are about to discover in the two following sections, 1917 was emphatically *not* 1941. Galen Jackson and André Kaspi were right; the two years do not at all represent the same conceptual entity. The earlier year really was not an instance of offshore balancing. And though the latter one *was* such an instance, it nevertheless testifies to how difficult it can be to prevent offshore balancing from ending up as the grand-strategic spitting image of the very orientation, geostrategic maximalism, to which it is supposed to be so preferable.

### The debate over American intervention in 1917

During the early post-Second World War years, the diplomatic historian Richard Leopold published a seminal article on America's entry into the European (and global) balance of power, in the new IR journal, *World Politics*. It was not the country's participation in the recently ended global conflagration that concerned him, but rather the one that had occurred a generation earlier. Although Leopold could hardly employ our contemporary term of art, offshore balancing, to explicate decisionmaking in Woodrow Wilson's Washington in 1917, he was bent on figuring out whether the sort of "existential" concern for America's physical security conveyed and even required by the concept had in fact been responsible for that year's intervention decision. By the time Leopold was writing, there was nothing novel about the idea that Wilson's decision for war should have had security – meaning, physical security – worries as motivating rationale.

As long ago as the neutrality period running from August 1914 to April 1917, there had been an active constituency insistent upon augmenting "preparedness" against the clear and present danger presented by a country few of them needed to bother identifying by its name, Germany.<sup>16</sup> Some of their themes would again be aired a generation later, in another war in which Germany featured centrally as culprit. Contemplating retrospectively the April 1917 decision with their minds concentrated upon the predicament facing America at the start of the 1940s, intervention advocates this second time around easily imagined that the earlier intervention decision simply *must* have been taken for identical reasons of national security.

But even though they could not dress up their own arguments in today's conceptual garb, it only made sense to interventionists of the early 1940s that America's entry into the previous war had to have been the sole course of action imaginable if the country's vital interests were to be protected against the threat of a rising overseas power determined to achieve regional, and ultimately world, hegemony. Walter Lippmann, writing during the midst of that second global upheaval, was certain that, just as during the current crisis, so too in 1917 had an American president understood the need to enter the European balance of power, because in 1917 America's physical security depended upon the Royal Navy every bit as much as it would come to do in 1941. Take the Royal Navy out of the equation, and water would turn out to have no stopping power, at all.<sup>17</sup>

Leopold was dismissive of the claim that preventing the rise of a European regional hegemon bound to challenge the US was what had determined the issue in April 1917.

True, deductive logic seemed to be on the side of those who imagined security concerns *must* have been determinative in that earlier decisionmaking, but where was the evidence supporting that logic? Leopold found none, and though he did not rule out the possibility that future researchers might yet unearth some, he did not expect this to happen. His pessimism was reflected in a comment made in one of his article's footnotes, to the effect that "a member of my graduate seminar at Harvard in 1947, Robert E. Osgood, was unable to discover in a semester's search any substantial amount of contemporary evidence to support the Lippmann thesis."<sup>18</sup>

Later generations of scholars would continue to debate the part played by offshore-balancing logic in the 1917 decision. Foremost in this line of inquiry was Daniel Malloy Smith, who in an important review article written during the era of the Vietnam War, drew readers' attention to some accounts of Wilson's decisionmaking that had appeared recently in print, meaning in the 1950s. Smith's search for a security rationale had been partly motivated by a desire to debunk claims regularly made that Wilson had been a clueless, priestly, idealist.<sup>19</sup> Notwithstanding his intuitive sympathy for the security explanation of Wilsonian decisionmaking, Smith still drew back from endorsing the assertions of scholars who thought they had found, in threat perception rooted in worries about a rising regional hegemon across the Atlantic, the answer to the question of why America intervened in April 1917. Instead, he concluded that the "hypothesis that the United States went to war in 1917 to protect its security against an immediate German threat lacks persuasiveness."<sup>20</sup>

Much more recently, Galen Jackson has ratified these judgments, casting a critical glance at the assertion that Woodrow Wilson sought intervention because he worried that Germany would otherwise attain regional hegemony in Europe. Jackson conceded that the Mearsheimer account of April 1917, as representing offshore balancing in action, had a great deal of deductive appeal. The trouble was that the archival record was at odds with Mearsheimer's hypothetico-deductivist premises. For those premises to be credible, Jackson insisted that there should have existed a documentary trail of presidential thinking testifying to the presence of four suppositions.

The first of these suppositions was that by April 1917 Woodrow Wilson should have clearly perceived the condition of the British and French as being particularly parlous. Second, he must have been of the view that Russia's revolution of the previous month was going to detract from the Allied war effort rather than support it. Third, Wilson needed to have convinced himself that the situation in Germany and Austria-Hungary was especially favorable to the strategic interests of both those powers. Fourth and finally, Wilson must have believed that only a massive injection of American force on the side of the Allies could save the day. Jackson found evidence for none of these suppositions in the documents he canvassed. His conclusion can be taken as definitive: "Although one could certainly make a strong case that the Allies were close to military defeat in the spring of 1917, the key point that emerges from the foregoing analysis is that *the United States simply did not comprehend this reality*.... Regardless of what the true balance of power in Europe was in early 1917, from Washington's perspective there did not appear to be any reason to think Germany was on the verge of achieving a position of regional hegemony on the continent."<sup>21</sup>

The offshore-balancing argument does not have a monopoly on accounts of Wilson's decisionmaking that invoke physical security as a prime motivation for intervention.



Different kinds of security-related arguments have been made, bereft of any assumptions about “regional hegemons” halfway around the world. Almost always, these arguments have been advanced by defenders of Wilson seeking to rebut critiques that his policymaking had been fundamentally flawed as a result of an inattentiveness to security rationales. Such critiques highlighted Wilson’s willingness to denigrate alliances and the balance of power in favor of what the critics took to be his feckless (and ultimately reckless) ideological commitment to “collective security.”<sup>22</sup>

Yet Wilson has hardly lacked for defenders, among whom Arthur Link had been the most prepared to fire back against the realists that it was they, not the twenty-eighth president, who suffered from delusions. In this retort, Wilson was presented as someone with preternatural insight into the “true” structural preconditions for peace; indeed, he was quite the realist in his own right, and not at all the priestly utopian of realists’ caricature. Admittedly, Wilson’s represented a “higher” realism,<sup>23</sup> which has even been likened by one scholar to a kind of Waltzian structural realism antedating Kenneth Waltz. In this reading, Wilson’s “realism,” as would Waltz’s six decades later, required a *structural* remedy for the dangerous defects of multipolarity. But whereas the IR scholar imagined this remedy to reside in a particular configuration of the balance of power termed “bipolarity,”<sup>24</sup> the president would go the whole hog and solve the world’s structural dilemma by replacing the balance of power altogether with the apparatus of collective security.<sup>25</sup>

Mostly, though, explanations of the April 1917 decision have focused on rationales that can only with great difficulty be *directly* predicated upon the defense of the country’s physical-security interests. Some of these alternative accounts centered less on Wilson and more on features of America’s socio-economic order. Some dwelt upon the misdeeds of foreigners who were not called Germans. And some cast the decisionmaking squarely upon the shoulders of the president himself. In short, just as the passage of more than a century has not made any clearer the “real” cause of the First World War,<sup>26</sup> so too have the years since 1917 complicated rather than simplified the question of why America entered that war.

Among the least valid answers to the question are those contained in three interpretive clusters. The first cluster comprises accounts ascribing the war decision to the pressure of economic constituencies demanding entry into the conflict to safeguard American commercial and financial interests. The second is made up of accounts that blame foreign (mainly British) propagandists for “suckering” a gullible yet idealistic American public into demanding war. The third shifts the level of analysis from socio-economic to individual variables, and features accounts postulating severe deficiencies in Woodrow Wilson’s decisionmaking capacities, stemming either from presumed character flaws or from medical handicaps that distorted his judgment. I start with these three clusters below, prior to ending this section by a brief examination of two other, more compelling, explanations.

The place to begin is with the general orientation, among scholars of US foreign policy, characterized as “revisionism.” As a *named* body of scholarly (and other) policy analysis, revisionism has been a feature of American diplomatic lore for about a century. During that time, there have been two discontinuous periods in which revisionist approaches, so named, have flourished, to the extent of becoming intermittently persuasive “counter-orthodox” accounts of foreign-policy reality. The first period, and the

one of concern to us here, was the interwar years, when there occurred a widespread American revulsion against what quickly came to be seen as a disastrous postwar settlement.<sup>27</sup> During the heyday of interwar revisionism, some of the lustiest voices in the counter-orthodoxy choir had, not too long before, been enthusiastic champions of the April 1917 decision. Harry Elmer Barnes was one such voice,<sup>28</sup> and his quest for what he took to be the righting of the historical record was also a bid for personal expiation.

Barnes was hardly alone in being a once-exuberant interventionist whose illusions were shattered by the Versailles peace settlement.<sup>29</sup> Many other interwar revisionists had also gladly drunk the inspirational Kool-Aid poured out for them by President Wilson, and really had convinced themselves that the war would be a righteous crusade intended to accomplish nothing less than to put an end to war forever. When they found, during the early postwar years, how flawed the 1919 peace settlement had become, it was only natural for them to revisit their earlier convictions regarding the rectitude if not nobility of the decision to intervene in the first place. Nothing, it seems, can beat a failed, or Carthaginian,<sup>30</sup> peace as a stimulus to reexamining the “real” reasons impelling a decision to intervene. The search for miscreants easily led some revisionists to probe the part played by “big business” in getting America mixed up in a war from which hindsight counseled it should have remained aloof. The crux of this particular revisionist critique was that America had thoroughly compromised its neutrality after August 1914 by allowing the belligerents to shop in its marketplace for munitions and other commodities needed to sustain their war economies, and – to some an even more egregious departure from neutrality – by allowing them to raise money from its financial institutions to pay for these purchases.<sup>31</sup> In the crisp judgment of Charles A. Beard, the “approaching bankruptcy of the Allies, with an accompanying economic collapse in the United States, was the real force which brought us into the war.”<sup>32</sup>

If the first strand of interwar revisionists concentrated on economic variables, there was a second major group of interwar revisionists whose epistemological orientation was of a decidedly non-materialist stamp. For this other group, it was emotionalism and public opinion that proved to be determinative of the decision for war – a decision that was, essentially, *demande*d by societal forces, though the transition mechanisms that led to the public’s alleged preferences becoming those of a president unusually resistant to heeding public opinion never did, or could, get credibly established.<sup>33</sup> More interesting is *why* this band of revisionists thought the American public wanted war. For many of them, the answer is because the public was duped into believing that the war was going to be a glorious crusade to right horrible wrongs and to create a better future. Most revisionists in this camp could identify what it was that so misled the American public. They knew it had to have been the handiwork of foreign propagandists. To this perspective was given the name, the “propaganda school” of American intervention.

Although the economic-interest and propaganda schools, between them, came to monopolize most of the critical judgments upon America’s intervention in 1917, one further group deserves mention here. This third group shifted the focus from the societal to the individual level of analysis and argued that the decision for war was a highly personal one made by a highly troubled individual. That individual was Woodrow

Wilson. Prior to the presidency of Donald Trump,<sup>34</sup> no chief executive's character had ever been the subject of as much scholarly and journalistic scrutiny as Wilson's.

Some said Wilson was basically prejudiced in favor of the Allied cause, because of his supposed adoration of his "ancestral" homeland (the United Kingdom), leading him to adopt a fundamental, and non-rational, bias against Germany.<sup>35</sup> Mostly, however, the school of Wilson interpreters who doubted the president's capacity to make rational foreign-policy decisions focused not on his bloodstream but on his cranium; for these critics, he was simply too flawed an individual to take sound policy decisions. Crudely put, many critical assessments of the Wilsonian legacy have been founded upon the assumption that he suffered delusions of being God-ordained to save mankind itself from the plague of war, a leader savagely lampooned during the interwar period by H. L. Mencken as a "self-bamboozled Presbyterian, the right-thinker, the great moral statesman, the perfect model of the Christian cad."<sup>36</sup> Others have expressed a similar view, albeit vastly more politely.<sup>37</sup> Yet even more critical attention has been allocated not to the president's religious sentiments but to his psychological and neurological status, a focus honed by legions of psychobiographers.<sup>38</sup>

If we discount the revisionist and other critiques of April 1917 sketched above, how should we conclude this section, which has concentrated upon the shortcomings of the offshore-balancing explanation of the decision for war? Two explanations suggest themselves as being more credible than anything discussed so far in this section. Neither is new. One explanation is that Wilson had to ask for a declaration of war upon Germany in April 1917 (he would not make a similar request in respect of the Austro-Hungarian empire until the end of the same year) because Germany's resumption of unrestricted submarine warfare shortly before had forced his hand, leaving him no option but war.<sup>39</sup> The other argument is that he took his country to war because he wanted it to be the key actor in the postwar peace negotiations.

The first claim is that the president felt himself to be honor-bound to declare war on Germany once Berlin resumed unrestricted undersea warfare on 1 February 1917. Even if this did not directly endanger America's own physical security, it assuredly could and did pose mortal peril to individual Americans, and therefore constituted an affront to the country's sense of honor. No president, in this view, could turn a blind eye to such an affront, not even one so dedicated to pacifism as Wilson was often considered to be. Those scholars (and they are many) who have Wilson being, ultimately, forced by events to take the US into war, rely on one of the oldest and most widely accepted causal arguments about April 1917, namely that the U-boat brought America into the fight.<sup>40</sup> The submarine thesis continues to resonate with scholars who emphasize the importance of Wilson's determination to protect America's "neutral rights."<sup>41</sup> This was hardly the same thing as protecting its physical security by balancing anyone's power, least of all that of any would-be regional hegemon.<sup>42</sup> In the words of one supporter of the submarine thesis, Robert W. Tucker, the "oldest explanation of America's entrance into World War I remains the most satisfactory. It was the challenge of the submarine to America's right as a neutral that left no alternative save war. In the absence of that challenge, the country would in all likelihood have remained a nonparticipant ... despite the prospect of being excluded from the peace settlement and despite the prospect of Allied defeat."<sup>43</sup>

The second explanation, while not dismissive of the submarine thesis, nevertheless highlights something else: Wilson's zeal to become a major shaper of future peace. According to this argument, Wilson understood that only America could make possible the transformation of world politics from a zone of war to one of peace, but – tragic as it was ironic – for this to happen, the US must first forsake the path of peace and enter the war. Wilson, it has been said, understood America's credibility needed to be preserved, not just in a military sense, but perhaps even more importantly in a moral one, if the country was to be able successfully to leverage its consummate ethical capital at the postwar peace table. But to be at that table, the US, in this view, had to intervene on the triumphant side.<sup>44</sup> Failure to be in on the making of war would have deprived America of the opportunity to dominate the peace-making. As we saw above, in the discussion of his “higher realism,” Wilson had some very lofty visions in sight.<sup>45</sup> But playing the part of offshore balancer was not among them, nor could it have been. Collective security required the abolition of the balance of power, not its *preservation*. As a result, for Wilson this war was one of choice, and not of necessity, which is what it should have been, had his decisionmaking been impelled by the logic of offshore balancing.<sup>46</sup>

### The debate over American intervention in 1941

If 1917 looks like anything *but* an intervention motivated by the dictates of offshore balancing, the case is otherwise for 1941. Whether we accept Mearsheimer's contention that there were two qualitatively different interventions of that year (as opposed simply to two variants of the *same* intervention), it cannot be disputed that Franklin D. Roosevelt took his country into war for reasons congruent with offshore-balancing logic. Indeed, if ever there had been a moment when America assumed the role of an offshore balancer, then “1941” represented that time (even though the offshore-balancing die was actually cast in 1940).

Recall that, according to Mearsheimer's offensive-realist formulation, there were two impetuses behind offshore balancing in the run-up to the Second World War. One was simply to keep the danger to American physical security as far away as possible from the homeland. The other, more theoretically exigent, impetus resided in Mearsheimer's assertion that the United States needed to give itself as free a hand as possible *outside* its own sphere of interest, by confronting a peer competitor not in America's but in that competitor's neighborhood – and this even if the competitor harbored no intention of trespassing on America's geostrategic turf. This second aspect of the Mearsheimerian formula leads some analysts to join him in situating offshore balancing *completely* within an offensive-realist framework.<sup>47</sup>

The reality, however, is that offshore balancing speaks to both variants of structural realism. It can be motivated by the desire to prevent some putative regional hegemon from meddling in America's “sphere” by injecting an American military presence into that rival's own sphere; this would reflect a defensive-realist, and *preemptive*, construe of offshore balancing, something undertaken with the goal of maximizing the security of the American homeland and driven by a clear perception of impending menace. Conversely, offshore balancing in the offensive-realist version, because presumably

motivated by the maximization of state power, can be implemented irrespective of the threat perception regarding American homeland security. Indeed, there need not be any perception at all of looming threat to America's homeland security to trigger the offshore-balancing strategy, according to the logic of offensive realism; for if the purpose of statecraft is power maximization, then smiting a rising power *preventively*, wherever it may happen to be located, can be a justifiable – indeed, a required – policy response. Where defensive realists see preemption as the motivation for offshore balancing, offensive realists glimpse prevention.<sup>48</sup>

Here arises the first of two ironies associated with the 1941 intervention. It was indeed an instance of offshore balancing, thus is quite unlike the 1917 decision. But if Mearsheimer is as correct for the later year as he is incorrect for the earlier one, it is not for reasons dictated by his offensive-realist logic. Franklin D. Roosevelt, whose administration implemented the offshore-balancing strategy for the first time ever, was no offensive realist – indeed, some scholars, a bit harshly, consider him not to have been any kind of a realist at all.<sup>49</sup> Roosevelt, however, did become a convert to defensive realism, if by this label we simply mean that, when designing and implementing America's approach to the conflict that had broken out in Europe in 1939, he sought to maximize his country's physical security.

The charge that Roosevelt was not much of a realist owes a great deal to the president's foreign policy declarations and decisions earlier in the 1930s, before the ultimate breakdown of peace in Europe. Prior to his November 1932 election triumph over Herbert Hoover, and during the first half-dozen years of his lengthy White House tenure, Roosevelt shared an outlook on interventionism that differed hardly at all from that of most Americans, the vast majority of whom grew ever more convinced that the 1917 intervention had been a terrible error, one that should never be repeated in the event of another great-power war in Europe. Roosevelt's anti-interventionist views would, of course, change, as did those of that majority, with the growth in the perception of a German menace to America's physical-security interests in its own “near abroad.” But this took time.

Importantly, when the perception of menace to homeland security first arose, it did so in respect of America's sphere of greatest security interest, the Western hemisphere. This is what would be expected of defensive-realist logic. In other words, this budding “offshore balancer's” sense of looming threat owed nothing to any urge to secure by preventive military measures as open a door as possible to the country's interests *outside* of its own geographical region, as the offensive-realist version would have it. Instead, it owed everything to Roosevelt's desire to preserve the Western hemisphere as the last refuge for peace and democracy in an increasingly imperiled world.

It might be surprising, and to some discomfiting, to encounter the claim that Franklin Roosevelt, whom posterity would remember as one of America's most internationalist presidents – the personification of an inspirational global vision subsumed in his “Four Freedoms”<sup>50</sup> – should have for several years conceptualized foreign policy within a framework that could be associated with isolationism. Yet this “internationalist” was also someone who took seriously the power of historical analogy to impart certain lessons to which all Americans, including policymakers in Washington, ought to pay heed.<sup>51</sup> Thus while Roosevelt by the start of the 1940s had ceased to be the anti-interventionist he once was,<sup>52</sup> this does not erase the fact that during those long

years of the 1930s he had placed avoidance of war above the shoring up of the European balance of power. Moreover, his was an anti-interventionism colored by what one political scientist has rightly characterized as “Europhobic-hemispherism.”<sup>53</sup>

What shook him out of his prior conviction that America could remain safe in its own hemispheric zone of peace was his growing conviction that preserving that zone simply could not be accomplished short of American intervention, once again, in the European balance of power. What Trotsky is supposed to have remarked apropos of war, that “you may not be interested in *it*, but it is interested in *you*,” is simply another way of expressing the first of Mearsheimer’s two logical tenets of offshore balancing, the one offensive realism shares with defensive realism: the need to prevent a rival from “roaming” in America’s own security sphere. By the late 1930s, that security sphere was being articulated, even by the most stalwart among isolationists, as representing the entire Western hemisphere (south of Canada, at least, for that country’s constitutional connection with Britain made it a participant in the European balance of power in both world wars).<sup>54</sup>

It became increasingly apparent in Washington by 1940 that it might not be an easy thing to seal off the far (or even some near) reaches of the hemisphere from the peril expected to result from any Nazi conquest of Europe. No contemporary writer ever captured that peril more skillfully than Eugene Staley. Writing in the latter part of that year, Staley carefully outlined the reasons why, in America’s case, water had so little stopping power, and why the only way truly to defend the Western hemisphere was to project American naval force forward, at the side of the United Kingdom.

“Continental” solidarity of the sort imagined by many isolationists and so many others who opposed intervention in the European balance of power was a “myth,” insisted Staley. Politically, the republics of the Western hemisphere might have shared, by definition, a rhetorical commitment to “republicanism,” but it was not the kind of republicanism Washington preferred, as tantamount to liberal democracy. Geographically, there was even less hemispheric “community,” for if some parts of Latin America were obviously proximate to the US, other portions, including what were seen to be especially vulnerable states of South America’s “southern cone” (Argentina, Chile, and Uruguay) could scarcely be considered neighbors at all, being further away and harder to reach than many European lands. And as far as economics went, it was simply impossible to conceive of the hemisphere as a self-contained unit, because too many Latin American states depended upon exporting to Europe, no matter who ruled it, the commodities that simply could never be absorbed by the US marketplace.

Staley’s recommendation was clear, and it came straight out of a defensive-realist playbook: “In sum, South America is overseas to us, and important parts of it are farther from our bases than from the bases of European powers. The problem of defending South America is a maritime, not a continental problem, and if command of the seas in the South Atlantic passes to hostile powers we could neither establish bases there ourselves nor prevent them from ensconcing themselves on the Continent.” It followed that keeping Britain in the fight against Hitler was an existential American interest, for reasons related directly to what would otherwise be a possibly insurmountable challenge of preventing Germany from making political, economic, and even military inroads into America’s near abroad. That is why, he concluded, reliance on hemisphere defense lines should be the default option not the preferred one, with

such defense lines “prepared for emergency use if the first line breaks and we are forced to fall back for a last-ditch stand. It is less risky to stand now for all-out defense, together with Britain, of the seas and the strong-points commanding the seas of the whole world – Singapore, Hawaii, Panama, Gibraltar, Suez, and Britain itself – than to let Britain go down and then to try to defend the Western Hemisphere practically alone.”<sup>55</sup>

By the time Staley’s advocacy made it into print, the Roosevelt administration had already begun adopting the first two (of three) measures that would render American involvement in a Second World War a foregone conclusion.<sup>56</sup> Those three measures, respectively, were the “destroyers-for-bases” deal announced in September 1940, the Lend-Lease legislation of the following March, and the US Navy’s convoying of British-bound supplies to Iceland, commencing in the summer of 1941.<sup>57</sup> All three measures flowed logically from defensive-realist assessments of threat that would come to a head in the late summer of 1940; none were motivated by an offensive-realist appetite to prevent Germany from obtaining “regional hegemony.” Had there been no belief – well-founded or otherwise – that a Germany triumphant in Europe would be *guaranteed* to aggress in the Western hemisphere (for that is exactly what was believed), there is little likelihood that the strategy of offshore balancing would have been adopted.

When the Roosevelt administration opted for a strategy of offshore balancing, it hardly required being prodded by Staley’s or any other scholar’s advocacies. Instead, the interventionist scholars were merely echoing and ratifying the administration’s own new-found conviction that the challenges of hemisphere defense had been looking to be more insoluble with every German victory in the spring offensive of 1940. As far back as 1936 and the formation of the Rome-Berlin “axis,” Roosevelt had begun to express concern about the possibility of Old World developments spilling dangerously into the New World, perhaps resulting someday in existential challenges to homeland security. Those earlier worries had, however, always been tempered by expectations that any future war in Europe would see the democratic allies, France and Britain, emerge victorious.

This accounts for why the Roosevelt administration focused, between 1938 and 1940, on hemisphere defense rather than forward defense. As Adolf Berle, assistant secretary of state, announced in late September 1938, henceforth “our true line was north and south, [and] that this called for swift action to counter weight the inevitable and immediate growth of movements along the lines of the German and Italian idea.”<sup>58</sup> Note that he was emphatically *not* suggesting any American defensive, preemptive, response that would look remotely like offshore balancing. Neither was the White House advocating such a strategy: just the opposite. The president was mindful that the Munich agreement of 30 September that (temporarily) staved off great-power war in Europe would have repercussions in the Western hemisphere. As a result, the US needed to begin strengthening hemispheric security independent of any cooperation with the European democracies. At a press conference on 14 October, he indicated he would delay making any budget statement for the coming fiscal year “for the reason that the new developments in national defense require such a complete restudy of American national defense that it will defer, necessarily, any budget comments for some time.”<sup>59</sup> That same week, he remarked to *New York Times* reporter Anne O’Hare

McCormick that “the outstanding fact of the present hour is that all signs point home.”<sup>60</sup>

And that is where all signs would continue to point, until the late summer of 1940, following which they would be pointing eastward, across the Atlantic, and westward, across the Pacific, because to the administration, both theaters of combat were inextricably linked. What so troubled the administration was less the admittedly distasteful thought that Hitler might achieve regional hegemony and in so doing foreclose an important part of the world to American interests. There was both less and more to it than that; the administration was convinced that a Hitler triumphant in Europe would *inevitably* attempt to penetrate America’s own region. It was acting, in other words, in strict accord with what was thought necessary for homeland defense. This would lead to his adopting a grand strategy of offshore balancing.

It can seem odd if not positively deranged to imagine there could *ever* have been a time when Latin America was situated at the forefront of American strategic thinking, so accustomed have we become to regarding that part of the world as a strategic backwater.<sup>61</sup> Starting in 1936, the fear mounted in Washington that Germany (along with its junior partners, Italy and Japan) had designs on Latin America. This perception of threat was fueled not only by America’s own official “eyes and ears” within its security and defense establishments, but also by a torrent of policy advocacies stemming from American and Latin American non-governmental sources, running from the late 1930s into the early 1940s.<sup>62</sup> However, it was not until the fall of France in 1940 that what had loomed as a possible existential threat to homeland security became elevated into an *impending* one. What Galen Jackson, Daniel Malloy Smith, Robert Endicott Osgood, and Richard Leopold tried but were unable to unearth in respect of evidence of offshore-balancing thinking on the part of the Wilson administration in 1917 was on abundant display within the Roosevelt administration during the half-decade leading up to 1941.<sup>63</sup>

This does not mean that what American officials *thought* was Germany’s intent in Latin America actually *was* its intent; what the American archives hold is abundant evidence attesting to the perception not necessarily the reality of impending security threat – though many will tell us that when it comes to threat assessment, perception *is* the reality. Debate has continued to percolate over the “real” cause of American intervention in the Second World War,<sup>64</sup> just as the intervention of 1917 has engendered ongoing disagreement. But whereas the earlier intervention has to be dissociated from perceptions of impending challenges to American physical security, it is all but impossible to do the same for the later intervention.<sup>65</sup> What Woodrow Wilson did not “see,” was all too apparent in Franklin D. Roosevelt’s eyes. It was danger, emanating especially from points south. That those perceptions of the threat to the hemisphere, in the event of a Nazi victory in Europe, may have been faulty (they were), is not the issue here. The issue is that they existed and were taken extremely seriously.

They were never taken more seriously than in the shocking aftermath of the fall of France in late June 1940. Although it is easy to make the case that “1941” is entirely or even mainly explicable because of Pearl Harbor, in fact the crucial decisions that virtually guaranteed a second American intervention in the global balance of power were made, sequentially, between the late summer of 1940 and the middle of 1941, so that in retrospect it might even be maintained, counterfactually, that Pearl Harbor



was epiphenomenal to American entry into the war. It is sometimes thought, even today, that Hitler's decision to declare war on the US four days after Pearl Harbor demonstrates his fundamental irrationality; presumably had he not done so the US would not have reciprocated by declaring war on him. But of course there was an element of rationality in Hitler's choice, since by the late summer and early autumn of 1941 the Germans were already engaged in an undeclared war at sea with the US Navy, and Hitler understood, correctly, that it would only be a matter of time before Germany would again be at war with America. Thus his gambit was not as crazy as sometimes it appears; he was acting preemptively to secure an advantage in a war with America that he may or may not have wanted, but that he understood he could not avoid.<sup>66</sup>

Few officials in the Roosevelt administration were so alarmist as to imagine that Germany and its allies, once victorious in Europe, would attack the US *directly*, and not many more worried that they would breach the hemisphere defense lines to the north, *via* Canada. But when thoughts turned to Latin America, confidence was anything but the order of the day, once the unimaginable occurred in June 1940. The German defeat of France was bad enough in its own right, but the defeat was made even more frightening, to Washington, by the prospect of a similar fate about to befall Britain.

Avoidance of this latter prospect would prove to be the strategic game-changer. In the immediate aftermath of the German victory over France, the belief in Washington was growing that Britain itself was all but certain to follow its recent ally into defeat. Although many British officials were convincing themselves that the German spring offensive would finally and automatically shake America out of its anti-interventionist torpor, things looked otherwise to officials in Washington, at least for a time. True, those British observers who were confident that America would have to alter its grand strategy in favor of what we now know to be offshore balancing ultimately proved correct. When the decision to adopt offshore balancing was taken, at the end of the summer, it was predicated upon two suppositions: 1) that defense of the homeland required buttressing Britain's position; and 2) that Britain was giving solid evidence of being able to survive for at least another year.

This evidence was supplied by the RAF's victory in the Battle of Britain during the latter part of the summer of 1940, which provided the president with the revised "odds" he needed if he was to wager scarce American defense assets on offshore balancing rather than on fortifying the hemisphere. Once it became clear that as the Germans could not neutralize the RAF in 1940, they could never get the air-superiority over the English Channel necessary to launch an invasion during that same year, the mood in Washington brightened considerably. But prior to that RAF victory, and notwithstanding Roosevelt's strong emotional support for Britain, he had been getting swamped by stern warnings against depleting America's martial cupboards in what was thought to be a futile bid to sustain British combat capability.

While it is obvious that some of these warnings sprang from the lips and pens of so-called "defeatists," the most relevant ones did not. Prominent among the apparent defeatists was Roosevelt's ambassador to the UK, Joseph Kennedy, who cabled the president repeatedly during those frenetic closing weeks of springtime, urging him to heed his head rather than his heart, and keep America's military assets safely on the

*western* side of the Atlantic. Kennedy's was not a counsel of pacifism; it was one of fear born of the conviction of impending German aggression in the New World. "It seems to me," he put it to Roosevelt a full month prior to the French agreeing to an armistice, "that if we have to fight to protect our lives, we would do better fighting in our own backyard."<sup>67</sup>

Among the president's close advisors were officials whom no one, today, would think to tar with the brush of defeatism, and yet who were arguing *exactly* as had Kennedy, the ambassador the president had grown to detest. For instance, the War Department was no less concerned about the risks entailed in "squandering" precious military equipment on what was looking like a very lost cause from the middle of May to well into June. It was not just the flagrantly anti-interventionist secretary of war, Harry Woodring, who harbored these anxieties; so too did the assistant secretary, Louis Johnson, and the chief of staff, George C. Marshall.

Illustratively, when the new British prime minister, Winston Churchill, wired Roosevelt on 15 May 1940 requesting a transfer of forty to fifty US Navy destroyers as well as several hundred fighter planes, the War Department successfully interceded with the president, persuading him of the urgency of retaining the ships and planes for future use in defense of the hemisphere. Two days after Churchill made his request, Marshall explained his opposition to the ship and fighter transfers to the secretary of the treasury, Henry Morgenthau, one of the administration's leading champions of all-out aid to Britain and France. "We have got to weigh the hazards in this hemisphere of one thing and another," said the chief of staff. Whatever supplies the US could spare from its own depleted arsenal would only amount to a "drop in the bucket on the other side, and it is a very vital necessity on this side and that is that. Tragic as it is, that is that." Marshall continued his campaign against aid to the allies on the next day, 18 May, when he sent Morgenthau a memorandum citing the "uncertainties of the situation in ... the Western Hemisphere and ... the defense of the Panama Canal," to support his claim that the country had no aircraft to spare for the British and French.<sup>68</sup>

A month later, there was no longer any need to worry about sending anything to France. But there remained those heart-rending British requests. In the War Department, minds were being made up, and not in any fashion that would have buoyed spirits in Britain, increasingly desperate to acquire arms and munitions from America. In response to the latest of a long string of British pleas for aid, each one more clamant than the last, and with the dawning inevitability of a French defeat, Marshall and his top aides, Brig. Gen. George V. Strong and Brig. Gen. Frank M. Andrews, agreed on a response to put to the president. Working from an outline prepared by the War Plans Division, they recommended – on the very day in mid-June when France notified Germany of its wish for an armistice – the following measures: that the US stay purely on the defensive in the Pacific; that it conduct an immediate mobilization of national effort to defend the hemisphere; and most importantly, that it make "no further commitments for furnishing matériel to the Allies." This final recommendation was justified as a "recognition of the early defeat of the Allies, an admission of our inability to furnish means in quantities sufficient to affect the situation, and an acknowledgment that we recognize the probability that we are next on the list of the Axis powers and must devote every means to prepare to meet the threat."<sup>69</sup>

Later that same day, Marshall took his forebodings to a meeting of the Standing Liaison Committee, with the aim of persuading his two fellow members, Adm. Harold R. Stark, the chief of naval operations, and Sumner Welles, the undersecretary of state, of the urgency of hoarding military and naval supplies for the defense of the New World against a grave security challenge guaranteed to be heading its way within a year. Indeed, of all the problems anywhere on earth demanding the attention of America's armed forces, said Marshall, "perhaps the most serious and delicate,... and one which is now staring us in the face" was the creation of a network of Nazi satellite regimes throughout Latin America. A strong response was required, and Marshall wanted nothing less than the "preventive occupation of the strategic areas in the Western Hemisphere wherein German or Italian bases might be established to menace the Panama Canal or the Continental U.S." No more resources could be spared for Britain, concluded Marshall. "The essence of the problem is time. Consequently the definite suspension of French *or* British resistance should become the signal for the start of complete mobilization of all our national resources."<sup>70</sup>

Trotsky could not have phrased it better: from the perspective of the Roosevelt administration, war definitely seemed to be interested in America, whether or not the American public thought similarly.<sup>71</sup>

### **Conclusion: think Joe Louis, not Goldilocks**

In retrospect, Marshall would have been better advised to have used the conjunction "and" instead of "or," in describing the event(s) that would have triggered that American preemptive (though he called it "preventive") occupation of northeastern Brazil. As we know, the dictates of homeland security were about to summon forth a grand strategy predicated upon offshore balancing rather than hemisphere defense, and while it might be imagined by adherents of the "Roosevelt-as-internationalist" camp that the decision to opt for offshore balancing had been foreordained because of the president's cosmopolitan worldview and his belief in the need to head off regional hegemony wherever they might arise, the reality is otherwise. As the summer of 1940 began, Roosevelt still had reason to hold back from handing over the keys to America's arsenal for British use. He feared that Britain was going to lose the war. Only after Britain's victory in the Battle of Britain could and did a new strategic calculus take root in Washington. As the summer wore on, it looked more and more obvious that the Germans would be unable to invade Britain until 1941 at the earliest. Moreover, with American assistance, Britain might never fall at all to the invading Germans. This in turn meant that hemispheric – therefore, homeland – defense could more effectively be mounted not in Latin America itself, but far forward in the Atlantic. In this way, homeland defense came to require expanding the "homeland" to include safeguarding the Atlantic sea lines of communication and, ultimately, the British Isles.

So, yes, offshore balancing did show itself to be the superior grand strategy for the US to adopt, commencing in the late summer and early autumn of 1940, and continuing throughout 1941. But it was adopted not because of the reasons imagined by the most robust reading of offensive realism's "teachings." Offshore-balancing logic did not generate the intervention decision of 1917, yet even when it did

impel that of 1941 it did so for reasons that correspond much more with the defensive-realist than they do with the with offensive-realist rendering of that logic.

This leads us to a final implication of 1941, one calling into question the curious claims often encountered about offshoring balancing representing, at best, a slightly less anemic version of strategic restraint, and at worst just another way of saying “isolationism.” For if 1941 truly was a manifestation of offshore balancing in operation, which it was, then the implications of this grand strategy call to mind not Goldilocks but Joe Louis. During that same year, 1941, in which offshore balancing became America’s operative grand strategy, the country’s greatest heavyweight boxer, Joe Louis, was preparing to defend his championship against a lighter but decidedly nimbler challenger, Billy Conn. Prior to their bout on 18 June, a sportswriter asked Louis how he intended to parry the speedy Conn’s hit-and-run tactics. To this question, Louis famously replied, “He can run, but he can’t hide.”

The comment may speak to a fact of pugilistic life, but even more it tells us something about the consequences of intervention decisions predicated upon existential security fears. For what an interventionist America discovered, once it had shed its isolationist tradition and reentered the European and global balance of power militarily, was that offshore balancing was hardly going to be the ticket to strategic “restraint.” Instead, as was amply demonstrated by the aftermath of offshore balancing both during and following the Second World War, this grand strategy would reveal itself to be an emphatically internationalist one, scarcely differing at all, qualitatively, from the so-called maximalism against which it is so often wrongly juxtaposed.

Offshore balancing, rather than serving as the off-ramp from foreign policy maximalism, is better conceptualized as an unavoidable on-ramp for deep engagement. America discovered, once it entered a ring circumscribed not by ropes but by the ligaments of a global balance of power, that hiding was not an option.

## Notes

1. Galen Jackson, “The Offshore Balancing Thesis Reconsidered: Realism, the Balance of Power in Europe, and America’s Decision for War in 1917,” *Security Studies* 21 (July 2012): 455–89, quote at p. 489; André Kaspi, *Le Temps des Américains: le concours américain à la France en 1917–1918* (Paris: Publications de la Sorbonne, 1976), quote at p. 3.
2. See Christopher Layne, “From Preponderance to Offshore Balancing: America’s Future Grand Strategy,” *International Security* 22 (Summer 1997): 86–124; and John J. Mearsheimer and Stephen M. Walt, “The Case for Offshore Balancing: A Superior U.S. Grand Strategy,” *Foreign Affairs* 95 (July/August 2016): 70–83. Individually, these latter two structural realists have championed this grand strategy in Walt, *The Hell of Good Intentions: America’s Foreign Policy Elite and the Decline of U.S. Primacy* (New York: Farrar, Straus and Giroux, 2018); and Mearsheimer, *The Great Delusion: Liberal Dreams and International Realities* (New Haven, CT: Yale University Press, 2018).
3. For instance, Mira Rapp-Hooper, *Shields of the Republic: The Triumph and Peril of America’s Alliances* (Cambridge, MA: Harvard University Press, 2020), 3–4; and Joseph S. Nye, Jr., “The Rise and Fall of American Hegemony: From Wilson to Trump,” *International Affairs* 95 (January 2019): 63–80.
4. For the tangled paradigmatic branches of what can often seem to be the tree of a very disputatious family, see Stephen G. Brooks, “Duelling Realisms,” *International Organization* 51 (Summer 1997): 445–77; William C. Wohlforth, “Gilpinian Realism and International

- Relations,” *International Relations* 25 (December 2011): 499–511; and especially Jonathan Kirshner, *An Unwritten Future: Realism and Uncertainty in World Politics* (Princeton, NJ: Princeton University Press, 2022).
5. Rather than being labelled “offshore balancing,” this practice of remaining aloof from continental alliances of a permanent nature was sometimes dubbed “splendid isolation,” likely the reason why some scholars today consider offshore balancing to be “minimalist” security dispensation. On the British experience, see Christopher H. D. Howard, “Splendid Isolation,” *History* 47, no. 159 (1962): 32–41; and Idem, *Splendid Isolation: A Study of Ideas Concerning Britain’s International Position and Foreign Policy During the Later Years of the Third Marquis of Salisbury* (London: Macmillan, 1967).
  6. Leslie W. Hepple, “The Revival of Geopolitics,” *Political Geography Quarterly* 5 (October 1986): S21–36. Also see Robert D. Kaplan, *The Revenge of Geography: What the Map Tells Us About Coming Conflicts and the Battle Against Fate* (New York: Random House, 2012); and Hal Brands and John Lewis Gaddis, “The New Cold War: America, China, and the Echoes of History,” *Foreign Affairs* 100 (November/December 2021): 10–20. On geopolitics as an ideational trace element in realism, see Matthew Specter, *The Atlantic Realists: Empire and International Political Thought between Germany and the United States* (Stanford, CA: Stanford University Press, 2022).
  7. John J. Mearsheimer, *The Tragedy of Great Power Politics* (New York: W. W. Norton, 2001).
  8. Mearsheimer, *Tragedy*, 127.
  9. See Jonathan Kirshner, “The Tragedy of Offensive Realism: Classical Realism and the Rise of China,” *European Journal of International Relations* 18 (March 2012): 53–75.
  10. John J. Mearsheimer, “The Inevitable Rivalry: America, China, and the Tragedy of Great-Power Politics,” *Foreign Affairs* 100 (November/December 2021): 48–58, quote at p. 51.
  11. On that rise, see Fareed Zakaria, *From Wealth to Power: The Unusual Origins of America’s World Role* (Princeton, NJ: Princeton University Press, 1998); Robert E. Hannigan, *The New World Power: American Foreign Policy, 1898–1917* (Philadelphia: University of Pennsylvania Press, 2002); and, for a prescient contemporary assessment of the rise and its foreign policy significance, Archibald Cary Coolidge, *The United States as a World Power* (New York: Macmillan, 1909).
  12. See Perry Anderson, *The H-Word: The Peripeteia of Hegemony* (London: Verso, 2017). Also see G. John Ikenberry and Daniel Nexon, “Hegemony Studies 3.0: The Dynamics of Hegemonic Orders,” *Security Studies* 28 (May 2019): 395–421.
  13. Comments sagely one expert on Sino-American relations, apropos the strong definition of hegemony, regional or otherwise, “the United States does not have the option of imposing its will on China any more than it was able to do in Afghanistan, Iraq, Libya, Syria, or Venezuela. If the United States cannot bend Cuba to its will, then it is unrealistic to expect it will be able to do so with China.” Ryan Hass, *Stronger: Adapting America’s China Strategy in an Age of Competitive Interdependence* (New Haven, CT: Yale University Press, 2021), 75.
  14. Apropos that rallying, one analyst remarks that “[f]or the first time in years, the United States has demonstrated policy competence during a global crisis.” Daniel W. Drezner, “The Perils of Pessimism: Why Anxious Nations Are Dangerous Nations,” *Foreign Affairs* 101 (July/August 2022): 34–43, quote at p. 43.
  15. G. John Ikenberry, “Getting Hegemony Right,” *National Interest*, no. 63 (Spring 2001), 17–24.
  16. On those campaigns of the neutrality years, see John Patrick Finnegan, *Against the Specter of a Dragon: The Campaign for American Military Preparedness, 1914–1917* (Westport, CT: Greenwood, 1974).
  17. Walter Lippmann, *U.S. Foreign Policy: Shield of the Republic* (Boston, MA: Little, Brown, 1943). Also see Forrest Davis, *The Atlantic System: The Story of Anglo-American Control of the Seas* (New York: Reynal and Hitchcock, 1941).

18. Richard W. Leopold, "The Problem of American Intervention, 1917: An Historical Retrospect," *World Politics* 2 (April 1950): 405–25, quote at p. 423, n52.
19. On those claims, see John Milton Cooper, Jr., *The Warrior and the Priest: Woodrow Wilson and Theodore Roosevelt* (Cambridge: Belknap Press of Harvard University Press, 1983). For a critique of Wilsonian diplomacy mounted by a prominent realist scholar during the early post-Second World War period, see Robert Endicott Osgood, *Ideals and Self-Interest in America's Foreign Relations: The Great Transformation of the Twentieth Century* (Chicago, IL: University of Chicago Press, 1953). Osgood was the Harvard graduate student mentioned in the Leopold article; this book stemmed from his dissertation.
20. Daniel Malloy Smith, "National Interest and American Intervention, 1917: An Historiographical Appraisal," *Journal of American History* 52 (June 1965): 5–24, quote at pp. 23–24. Also see Idem, *The Great Departure: The United States and World War I, 1914–1920* (New York: John Wiley and Sons, 1965).
21. Jackson, "Offshore Balancing Thesis Reconsidered," 485–86 and 488–89 (emphasis added).
22. In addition to Osgood, *Ideals and Self-Interest*, Wilson critics include Lloyd E. Ambrosius, *Wilsonian Statecraft: Theory and Practice of Liberal Internationalism during World War I* (Wilmington, DE: Scholarly Resources, 1991); and Richard Striner, *Woodrow Wilson and World War I: A Burden Too Great to Bear* (Lanham, MD: Rowman & Littlefield, 2014).
23. Arthur S. Link, *The Higher Realism of Woodrow Wilson* (Nashville, TN: Vanderbilt University Press, 1971). Also rejecting the critics' interpretation of Wilson are William G. Carleton, "A New Look at Woodrow Wilson," *Virginia Quarterly Review* 38 (Fall 1962): 545–66; and John Milton Cooper, Jr., *Woodrow Wilson: A Biography* (New York: Alfred A. Knopf, 2009).
24. Kenneth N. Waltz, *Theory of International Politics* (Reading, MA: Addison-Wesley, 1979).
25. For this intriguing thesis, see Ross A. Kennedy, "Woodrow Wilson, World War I, and an American Conception of National Security," *Diplomatic History* 25 (Winter 2001): 1–31. Also see Idem, *The Will to Believe: Woodrow Wilson, World War I, and America's Strategy for Peace and Security* (Kent, OH: Kent State University Press, 2009).
26. On this contested question of causation, see John W. Langdon, *July 1914: The Long Debate, 1918–1990* (Oxford: Berg, 1991); and Hew Strachan, *The Outbreak of the First World War* (Oxford: Oxford University Press, 2004). Analytically, the debate can be broken down into two chief paradigms, stressing different sorts of pressures leading to war, ranging from ascriptions of deliberate intent on some state's part to assertions that no one wanted the war into which European states blundered for a variety of reasons. These contrasting perspectives are sometimes given the respective labels of "German paradigm" and "Balkans-inception thesis." See Annika Mombauer, "The Fischer Controversy, Documents, and the 'Truth' about the Origins of the First World War," *Journal of Contemporary History* 48 (April 2013): 290–314; John C. G. Röhl, "Goodbye to All That (Again)? The Fischer Thesis, the New Revisionism and the Meaning of the First World War," *International Affairs* 91 (January 2015): 153–66; Samuel R. Williamson, Jr., "July 1914 Revisited and Revised: The Erosion of the German Paradigm," in *The Outbreak of the First World War: Structure, Politics, and Decision-Making*, ed. Jack S. Levy and John A. Vasquez (Cambridge: Cambridge University Press, 2014), 30–62; and Christopher Clark, *The Sleepwalkers: How Europe Went to War in 1914* (New York: Harper, 2013).
27. The second era in which revisionism, so named, has made inroads into the community of foreign policy analysts is a more recent one, and can be said to have begun around the time of the Vietnam War; it continues to be an attractive perspective for those whose epistemological tastes run more toward critical theory and less toward explanatory theory.
28. See Harry Elmer Barnes, *Genesis of the World War: An Introduction to the Problem of War Guilt* (New York: A. A. Knopf, 1926); as well as C. Hartley Grattan, *Why We Fought* (New York: Vanguard, 1929).
29. Warren I. Cohen, *The American Revisionists: The Lessons of Intervention in World War I* (Chicago, IL: University of Chicago Press, 1967). Also see Stuart I. Rochester, *American Liberal Disillusionment in the Wake of World War I* (University Park: Pennsylvania State University Press, 1977).

30. John Maynard Keynes, *The Economic Consequences of the Peace* (New York: Harcourt, Brace and Howe, 1920). For a critical assessment of the Carthaginian trope, see Sally Marks, "Mistakes and Myths: The Allies, Germany, and the Versailles Treaty, 1918–1921," *Journal of Modern History* 85 (September 2013): 632–59.
31. For this staple of interwar revisionism, see Edwin Borchard and William Potter Lage, *Neutrality for the United States* (New Haven, CT: Yale University Press, 1937); and Alice Morrissey, *The American Defense of Neutral Rights, 1914–1917* (Cambridge, MA: Harvard University Press, 1939).
32. Quoted in Denna Frank Fleming, "Our Entry into the World War in 1917: The Revised Version," *Journal of Politics* 2 (February 1940): 75–86, quote at pp. 78–79.
33. In the apt words of one student of the intervention decision, "[u]nlike Washington, Wilson would never have tolerated a Hamilton.... Wilson's isolation was unparalleled among American presidents." Robert W. Tucker, *Woodrow Wilson and the Great War: Reconsidering America's Neutrality, 1914–1917* (Charlottesville: University of Virginia Press, 2007), 20–21. Supporting the view of an isolated Wilson is Henry A. Turner, "Woodrow Wilson and Public Opinion," *Public Opinion Quarterly* 21 (Winter 1957–58): 505–20.
34. Illustratively, Brandy Lee, et al., *The Dangerous Case of Donald Trump: 27 Psychiatrists and Mental Health Experts Discuss a President* (New York: St. Martin's, 2017); Bob Woodward, *Fear: Trump in the White House* (New York: Simon and Schuster, 2018); Daniel W. Drezner, *The Toddler-in-Chief: What Donald Trump Teaches Us About the Modern Presidency* (Chicago, IL: University of Chicago Press, 2020); Carlos Lozada, *What Were We Thinking: A Brief Intellectual History of the Trump Era* (New York: Simon and Schuster, 2021); and Maggie Haberman, *Confidence Man: The Making of Donald Trump and the Breaking of America* (New York: Penguin, 2022).
35. Expressive of the thesis that Wilson was "prejudiced," and that this was an important consideration in his opting for war, is Edward M. Coffman, *The War to End All Wars: The American Military Experience in World War I* (New York: Oxford University Press, 1968), quote at p. 6.
36. Quoted in Arthur M. Schlesinger, Jr., *The Crisis of the Old Order, 1919–1933* (Boston, MA: Houghton Mifflin, 1957), pp. 148–9.
37. Lloyd E. Ambrosius, "Woodrow Wilson's Health and the Treaty Fight, 1919–1920," *International History Review* 9 (February 1987): 73–84.
38. Sigmund Freud and William C. Bullitt, *Thomas Woodrow Wilson, Twenty-Eighth President of the United States: A Psychological Study* (Boston, MA: Houghton Mifflin, 1967); Alexander L. George and Juliette L. George, *Woodrow Wilson and Colonel House: A Personality Study* (New York: John Day, 1956); Bernard Brodie, "A Psychoanalytic Interpretation of Woodrow Wilson," *World Politics* 9 (April 1957): 413–22; Robert C. Tucker, "The Georges' Wilson Reexamined: An Essay on Psychobiography," *American Political Science Review* 71 (June 1977): 606–18; Edwin A. Weinstein, "Woodrow Wilson's Neurological Illness," *Journal of American History* 57 (September 1970): 324–51; Weinstein, James William Anderson, and Arthur S. Link, "Woodrow Wilson's Political Personality: A Reappraisal," *Political Science Quarterly* 93 (Winter 1978–1979): 585–98; and Dorothy Ross, "Woodrow Wilson and the Case for Psychohistory," *Journal of American History* 69 (December 1982): 659–68.
39. On the causal impact of the submarine, see Kendrick A. Clements, "Woodrow Wilson and World War I," *Presidential Studies Quarterly* 34 (March 2004): 62–82.
40. Charles Seymour, *American Diplomacy during the World War* (Baltimore, MD: Johns Hopkins Press, 1934).
41. See John W. Coogan, *The End of Neutrality: The United States, Britain, and Maritime Rights, 1899–1915* (Ithaca, NY: Cornell University Press, 1981).
42. Arguing that Wilsonian decisionmaking was motivated by idealism born of moral certainty rather than any power-based calculations is Robert H. Ferrell, "Woodrow Wilson: Man and Statesman," *Review of Politics* 18 (April 1956): 131–45. "The immediate occasion for American entrance into the war was the German declaration of unrestricted submarine warfare, which to Wilson's way of thinking was a criminal act. He seems to have gone into

- the war under the feeling that the balance of justice in the world was being sacrificed to the unjust Central Powers. There is no proof as yet that Wilson led the country into war with a clear determination to preserve the balance of power in Europe.... The 'new diplomacy' – a weighing of good against evil, rather than power against power – dictated his decision for war in 1917" (quote at pp. 143–44).
43. Tucker, *Woodrow Wilson and the Great War*, 204. Also see Justus Drew Doenecke, *Nothing Less Than War: A New History of American Entry into World War I* (Lexington: University Press of Kentucky, 2011), 249: "Germany's public announcement of unrestricted submarine warfare marked the beginning of the end of peace with the United States."
  44. See, especially, Osgood, *Ideals and Self-Interest*.
  45. Robert W. Tucker, "Woodrow Wilson's 'New Diplomacy,'" *World Policy Journal* 21 (Summer 2004): 92–107.
  46. "The great crusade of 1917–18 was a war of choice. What is more, it was a choice made under the worst possible circumstances." Walter A. McDougall, *The Tragedy of U.S. Foreign Policy: How America's Civil Religion Betrayed the National Interest* (New Haven, CT: Yale University Press, 2016), 141.
  47. For one such analysis, see Ionut Popescu, "American Grand Strategy and the Rise of Offensive Realism," *Political Science Quarterly* 134 (Fall 2019): 375–405.
  48. The differences between the two are explicated in Jack S. Levy, "Declining Power and the Preventive Motivation for War," *World Politics* 40 (October 1987): 82–107.
  49. Particularly, Frederick W. Marks III, *Wind over Sand: The Diplomacy of Franklin Roosevelt* (Athens: University of Georgia Press, 1988). But for a critique of this claim, see David Reynolds, *From Munich to Pearl Harbor: Roosevelt's America and the Origins of the Second World War* (Chicago, IL: Ivan R. Dee, 2001).
  50. Harvey J. Kaye, *The Fight for the Four Freedoms: What Made FDR and the Greatest Generation Great* (New York: Simon and Schuster, 2014); Jeffrey A. Engel, ed., *The Four Freedoms: Franklin D. Roosevelt and the Evolution of an American Idea* (New York: Oxford University Press, 2016).
  51. On the impact of revisionism during the interwar period, see Cohen, *American Revisionists*; on FDR's years as an isolationist, see Robert A. Divine, *Roosevelt and World War II* (Baltimore, MD: Penguin Books, 1970).
  52. Waldo H. Heinrichs, *Threshold of War: Franklin D. Roosevelt and American Entry into World War II* (New York: Oxford University Press, 1988).
  53. John Lambertson Harper, *American Visions of Europe: Franklin D. Roosevelt, George F. Kennan, and Dean G. Acheson* (New York: Cambridge University Press, 1994), 60. Also see, for this 1930s' Rooseveltian focus on "hemispherism," David G. Haglund, *Latin America and the Transformation of U.S. Strategic Thought, 1936–1940* (Albuquerque: University of New Mexico Press, 1984).
  54. See John MacCormac, *Canada: America's Problem* (New York: Viking, 1940).
  55. Eugene Staley, "The Myth of the Continents," *Foreign Affairs* 19 (April 1941): 481–94, quotes at pp. 490, 494.
  56. On those measures, see Warren F. Kimball, "Franklin D. Roosevelt and World War II," *Presidential Studies Quarterly* 34 (March 2004): 83–99.
  57. Of these, the most consequential was the decision to violate international law and transfer a portion of America's naval forces to Britain; see Richard M. Pious, "Franklin D. Roosevelt and the Destroyer Deal: Normalizing Prerogative Power," *Presidential Studies Quarterly* 42 (March 2012): 190–204.
  58. Unpublished diary of Adolf A. Berle, Jr., 26 September 1938, Berle Papers, box 210, Franklin D. Roosevelt Library [FDRL], Hyde Park, NY (hereafter, "Berle diary"). Berle was addressing his remarks to Secretary of State Cordell Hull, and departmental policy advisors James Dunn, Jay Pierrepont Moffat, and Norman Davis.
  59. Samuel I. Rosenman, comp., *The Public Papers and Addresses of Franklin D. Roosevelt*, 13 vols. (New York: Random House, 1938; Macmillan 1941–50), 7: 546.
  60. *New York Times Magazine*, October 16, 1938.



61. For a useful reminder that it was not always this way, see Michael C. Desch, *When the Third World Matters: Latin America and United States Grand Strategy* (Baltimore, MD: Johns Hopkins University Press, 1993).
62. Illustratively, these advocacies included Raúl Diez de Medina [Gaston Nerval], "Europe versus the United States in Latin America," *Foreign Affairs* 15 (July 1937): 642–45; Carleton Beals, *The Coming Struggle for Latin America* (Philadelphia: J. B. Lippincott, 1938); Pedro Motta Lima and José Barboza Mello, *El Nazismo en el Brasil: Proceso del Estado Corporativo* (Buenos Aires: Editorial Claridad, 1938); Ernesto Giudici, *Hitler conquista América* (Buenos Aires: Editorial Acento, 1938); Adolfo Tejera, *Penetración nazi en América Latina* (Montevideo: Editorial Nueva América, 1938); Th. Thetens and Ludwig Lore, "Chile as a Nazi Outpost," *Nation*, September 24, 1938, 296–98; José Bernal de León, *La quinta columna en el continente Americano* (México, D.F.: Ediciones Culturales Mexicanas, 1939); Enrique Dickmann, *La infiltración nazi-fascista en la Argentina* (Buenos Aires: Ediciones Sociales Argentinas, 1939); John T. Whitaker, *Americas to the South* (New York: Macmillan, 1939); Manuel Seoane, *Nuestra América y la Guerra* (Santiago de Chile: Ediciones Ercilla, 1940); Hugo Fernández Artucio, *Nazis en el Uruguay* (Montevideo: Talleres Gráficos Sur, 1940); Tomás G. Brena and J. V. Iturbide, *Alta traición en el Uruguay* (Montevideo: Editorial A.B.C., 1940); Norman P. Macdonald, *Hitler over Latin America* (London: Jarrolds, 1940); and Felipe Barreda Laos, *¿Hispano América en guerra?* (Buenos Aires: Linari, 1941).
63. The evidence is contained in archives in both Washington and Hyde Park, New York (the site of the Roosevelt presidential library). Archival sources on the threat perception associated with Latin America include the following, in the National Archives in Washington: State Department Decimal File, Record Group 59; as well as the War Plans Division and the Military Intelligence Division, War Department Files, Record Group 165. In Hyde Park, consult the unpublished papers of the president contained in his Official File, his Personal File, his Secretary's File, and in the voluminous unpublished diaries of Adolf A. Berle Jr. and Henry Morgenthau Jr.
64. For instance, see Justus D. Doenecke, *Storm on the Horizon: The Challenge to American Intervention, 1939–1941* (Lanham, MD: Rowman and Littlefield, 2000); David Kaiser, *No End Save Victory: How FDR Led the Nation into War* (New York: Basic Books, 2014); J. Garry Clifford, "Both Ends of the Telescope: New Perspectives on FDR and American Entry into World War II," *Diplomatic History* 13 (April 1989): 213–30; John M. Schuessler, "The Deception Dividend: FDR's Undeclared War," *International Security* 34 (Spring 2010): 133–65; and Christopher Darnton, "Archives and Inference: Documentary Evidence in Case Study Research and the Debate over U.S. Entry into World War II," *International Security* 42 (Winter 2017/2018): 84–126.
65. All but impossible, because some scholars have indeed argued that not only was there no actual threat to the hemisphere, but that there was not even any perceived threat; see for this claim, Bruce M. Russett, *No Clear and Present Danger: A Skeptical View of the United States Entry into World War II* (New York: Harper & Row, 1972).
66. See Brendan Simms and Charlie Laderman, *Hitler's American Gamble: Pearl Harbor and Germany's March to Global War* (New York: Basic Books, 2021).
67. Kennedy to Roosevelt, 15 May 1940, Department of State, *Foreign Relations of the United States* (Washington, DC: United States Government Printing Office, 1862– ), 1940, 3: 29–30.
68. John Morton Blum, *From the Morgenthau Diaries*, vol. 1: *Years of Crisis, 1928–1938*; vol. 2: *Years of Urgency, 1938–1941*; vol. 3: *Years of War, 1941–1945*, 3 vols. (Boston, MA: Houghton Mifflin, 1959–67), 2: 150.
69. Strong to Marshall, 17 June 1940, War Plans Division, Record Group 165, 4250-3.
70. Marshall to SLC, 17 June 1940, *ibid.* (emphasis added).
71. On the hesitancy of that public, see Steven Casey, *Cautious Crusade: Franklin D. Roosevelt, American Public Opinion, and the War against Nazi Germany* (New York: Oxford University Press, 2001).

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