

PUERTO RICO Y EL CARIBE EN EL DEBATE ESTRATÉGICO DURANTE LA SEGUNDA GUERRA MUNDIAL

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RÉSUMÉ

Entre les années 1938-1941, les sociétés militaire et civile nordaméricaines connurent d'intenses débats autour de la stratégie militaire des États-Unis confrontés à la guerre en Europe et à l'expansionnisme japonais. La neutralité et le pacifisme s'effacèrent devant la priorité de la défense continentale et hémisphérique. Dans le discours du réarmement, la Caraïbe —particulièrement Porto Rico et les Îles Vierges— constituèrent des points geostratégiques d'importance vitale. L'article passe en revue la littérature produite au cours de cette période, incluant plusieurs rapports-clefs qui se multiplieront après certaines manoeuvres militaires, lesquelles finiront par convaincre le Président Franklin D. Roosevelt de la nécessité d'augmenter la présence militaire et politique américaines à Porto Rico et, en général, dans les Caraïbes.

SAMENVATTING

Tussen 1938 en 1941 deed zich in de Verenigde Staten een intense debat voor over de militaire strategie van de VS tegenover de oorlog in Europa en het Japans expansionisme. Het neutralisme en het pacifisme moesten wijken voor de prioriteit van de continentale verdediging. In de discours van herbewapening nam het Caraïbisch gebied — vooral Puerto Rico en de Virgin Islands — als geostrategische ruimte een belangrijke plaats in. Het artikel analyseert de literatuur van deze periode, inclusief verschillende belangrijke rapporten, die de toenmalige president, Franklin Delano Roosevelt, hadden overtuigd dat het noodzakelijk was om de militaire en politieke aanwezigheid van de VS in Puerto Rico en in het Caraïbisch gebied te versterken.

PUERTO RICO AND THE CARIBBEAN IN U.S. STRATEGIC DEBATE ON THE EVE OF THE SECOND WORLD WAR¹

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ABSTRACT

Between 1938-1941 intense strategic debate took place in U.S. military and civilian society regarding war in Europe and Japanese expansionism. Over these years neutralism and pacifism gave way to an insistence on the need for continental and hemispheric defense. In the discourse of rearmament, the Caribbean — particularly Puerto Rico and the Virgin Islands — became a crucial geostrategic space. This article reviews the literature produced during this period, including several key reports that followed military maneuvers, and persuaded FDR to expand U.S. military and political presence in Puerto Rico and the Caribbean in general.

RESUMEN

Entre 1938 y 1941 se dio en la sociedad militar y civil norteamericana un intenso debate acerca de la estrategia militar de los Estados Unidos frente a la guerra en Europa y al expansionismo japonés. La neutralidad y el pacifismo cedieron ante la prioridad de la defensa continental y hemisférica. En el discurso de rearmamento, el Caribe —particularmente Puerto Rico y las Islas Vírgenes— se volvió espacio geoestratégico de vital importancia. El artículo revisa la bibliografía producida en este periodo, incluidos varios informes clave que afloraron después de maniobras militares, los cuales convencieron al presidente Franklin Delano Roosevelt de que era necesario aumentar la presencia militar y política estadounidense en Puerto Rico y en el Caribe en general.

¹ This is an excerpt from a book in preparation entitled *War and reform in Puerto Rico: the governorship of admiral William D. Leahy and the rise of the Popular Democratic Party, 1938-1941*.

During the period 1938 to 1941 (when the U.S. finally became a belligerent), an intense strategic debate took place in civilian and military circles regarding the defense policies the U.S. should adopt in view of impending (and later, actual) war in Europe and Japanese expansionism in the Asia-Pacific region. This debate was, to a large extent, conducted in public. It signified the gradual waning of the pacifist and neutralist consensus of the pre-1938 period, during which intellectual and political critics of U.S. participation in World War I had been extremely influential.²

Opposition to war, a large military establishment and "foreign entanglements" had brought together, since the 1920s, diverse and powerful political forces in Congress, the academy, the press and a vast network of peace groups (Drummond, 1955, chapter 1). These forces (as was demonstrated by the sharp negative reaction to FDR's "Quarantine Speech" and proposed military measures against Japan as a reaction to the Panay incident) were a formidable political obstacle to rearmament and measures for decisive war preparation.

The new strategic debate that began in 1938 tended to underscore U.S. military weakness and its unpreparedness for both continental and hemispheric defense. Although the Caribbean had always figured prominently in U.S. strategic thinking, its crucial importance for U.S. defense plans was considerably magnified after 1938. The Caribbean became the object of analysis in a deluge of articles and books. In fact, military control of Caribbean geostrategic space and its relationship to both continental and hemispheric defense plans became an almost obsessive preoccupation of strategic analysts. In the prevalent discourse, many Caribbean islands suddenly became "Gibraltars," "Mal-tas," "bulwarks," "ramparts," "keys," "capstones," "strongholds,"

² Among the abundant literature that reflected the views of the anti-war movement are, Harry Elmer Barnes, *The Genesis of the World War: an introduction to the problem of war guilt* (New York: Alfred A. Knopf, 1926); C. Hartley Grattan, *Why we fought* (New York: Vanguard Press, 1929); Harold D. Lasswell, *Propaganda technique in the World War* (New York: Alfred A. Knopf, 1927); sir Arthur Ponsonby, *Falsehood in war-time* (London: Allen and Unwin, 1928); Walter Millis, *The road to war; America, 1914-1917* (Boston: Houghton Mifflin Co., 1935); Helmut C. Engelbrecht and F.C. Haninghen, *Merchants of Death: A Study of the International Armaments Industry* (New York: Dodd, Mead and Co., 1934); Charles A. Beard, *The Devil theory of war* (New York: Vanguard Press, 1936); Charles C. Tansill, *America goes to war* (Boston: Little Brown and Co., 1938); Alice M. Morrissey, *The American defense of neutral rights, 1914-1917* (Cambridge, Mass.: Harvard University Press, 1939); and Horace C. Peterson, *Propaganda for war: The campaign against American neutrality, 1914-1917* (Norman, Okla.: University of Oklahoma Press, 1939).

"sentinels," "watchdogs," "outposts," or "defense problems..." Within the Caribbean, the geostrategic importance of the Puerto Rico-Virgin Islands zone was also greatly stressed. Parallel to this intellectual and political discussion, war planning was revised to reflect the renewed importance ascribed to the region.

Among the strategic proposals that were publicly discussed in 1938, George Fielding Eliot's book *The ramparts we watch, a study of the problems of American National Defense* — which by 1939 was in its sixth printing — had particular implications for military policy toward the Caribbean. This book appeared during the Sudeten crisis of September 1938. Eliot, a former Major of army intelligence, had also written with R. E. Dupuy another book that was published in 1937, *If war comes*, dealing with similar issues.³

In a broad analysis of U.S. military security and strategy, he proposed a policy of "hemispheric security" based on a balanced expansion of naval and military forces, but placing great emphasis on the navy's role. He also sharply criticized undue reliance on the expansion of air power.⁴ It is interesting to note that the epigraph of the first chapter is a quotation from an FDR speech on the deteriorating international situation, while the chapter on naval policy is headed by a statement of Admiral William D. Leahy, then Chief of Naval Operations and later to become Governor of Puerto Rico (1939-1940), on the importance of battleships (Eliot, 1938, pp. 1, 193).

Regarding the Caribbean, his argument closely followed known tenets of Captain Alfred Thayer Mahan's geopolitical outlook, underscoring the vital importance of the Panama Canal, and the need to ensure naval control of the entire region and access to bases. Additionally, control of the Caribbean was considered essential to the defense of Brazil and the South Atlantic. According to Eliot, Dutch, French and British possessions in the region should not be allowed to fall under the control of a hostile power, while existing bases (Panama, Guantánamo, Puerto Rico-Virgin Islands) should be developed and strengthened. He also called for the acquisition of additional bases and ex-

³ See also Eliot, 1939.

⁴ The notion that rearmament should mainly be based on the massive development of air power was advanced by Roosevelt towards the end of 1938 and opposed by both the navy and the army, who wanted a balanced expansion. Apparently, Roosevelt saw air power as an alternative to a large army, as well as an effective means of supporting the European allies.

pressly mentioned as possible sites Jamaica, Curaçao, Trinidad, Barbados and St. Lucia, all European possessions. In this regard, he proposed considering a barter of the Philippines for the British Caribbean territories, or condoning the British and French war debts in exchange for their Caribbean possessions, an old aspiration of some military sectors that had been rejected in 1936 (Eliot, 1938, pp. 154-157).

Eliot placed great emphasis on the importance of the Puerto Rico-Virgin Islands area. In a map of the Caribbean region, he drew a square over the zone and named it the "Eastern Outpost" (Eliot, 1938, p. 148). The vital Mona and Anegada passages could be controlled from these islands and air and naval power projected toward the Atlantic and the Lesser Antilles:

On the Mona passage we have Puerto Rico, a large island of considerable local resources with several good harbors, none of them, unfortunately, able comfortably to accomodate battleships. There are no fixed defense or even mobile heavy guns here, nor is there an air base. Just east of Puerto Rico and belonging to it is the islet of Culebra, whose Great Harbor is adequate for a fleet anchorage, though difficult to defend by fortification. A few miles further eastward, however, we possess a harbor of quite different characteristics. The island of Saint Thomas, one of the American Virgins, with its fine and easily protected port of Charlotte Amalie, is now our easternmost Caribbean possession. Together with Puerto Rico and Culebra, it forms an outpost which extends the influence of Guantanamo 700 miles to seaward and it watches the Anegada Passage, 70 miles distant, which is the principal commercial route for European traffic directed upon Panama [Eliot, 1938, pp. 152-153].

He proposed augmenting the Puerto Rican garrison to about 1 500 men and providing it with coastal artillery (Eliot, 1938, p. 259). With an additional base in Barbados or Trinidad and one or more auxiliary bases in the Lesser Antilles, the U.S. could seal all potential entry points to the Caribbean and project naval force toward the South Atlantic as far as the strategically important Brazilian "salient" (Eliot, 1938, pp. 154-155). It is striking how closely actual U.S. military planning followed Eliot's recommendations.

In late October 1938, *Life Magazine* published an article entitled "America gets ready to fight Germany, Italy and Japan," which included a half-page photo of admiral Leahy standing in front of a world

map. The map had a large arrow connecting the region of Dakar in Africa with the Brazilian bulge and a caption that read "it is only 2 000 miles from Africa to South America." It also included a map of the Caribbean indicating naval bases and maritime routes with the caption "Caribbean is strategic key to the Western Hemisphere" and indicated that "the region above is the part of his map which Admiral Leahy studies with most concern." It also said that "From the strategist's viewpoint, America's long soulsearchings over 'imperialism' in the Caribbean are sentimental twaddle. America *must* control the Caribbean or some other power may control America." *Life's* article cited Eliot's books *The ramparts we watch* and *If war comes* as authoritative sources on the Caribbean, emphasizing his recommendation of additional bases in several European possessions.⁵

It is also interesting that when a review of Eliot's book, written by Walter Millis, was published in the *Washington Post* in November 1938, it was accompanied by a prominent photograph of admiral William D. Leahy.⁶ The fact that Millis, though calling Eliot a "militarist," sympathetically reviewed his book ("a brilliant clarification of our strategic problem"), is an indication of how broad the emerging consensus on defense policy was by late 1938. Millis was a leading critic of U.S. expansionism and militarism and had published a widely read indictment of U.S. participation in World War I (Millis, 1936).⁷ Another article by the *Washington Star* on defense preparations cited both Leahy and Eliot as the main authorities on hemispheric defense, advancing quite similar proposals.⁸ All this indicates the semi-official character of Eliot's views, as well as Leahy's apparent support for his scheme.⁹

⁵ "America gets ready to fight Germany, Italy and Japan," *Life*, vol. 5, no. 18 (October 31, 1938).

⁶ Walter Millis, "Anatomy of National Defense," *Washington Post*, November 13, 1938.

⁷ See also Millis' *The martial spirit* (Cambridge, Mass: The literary guild of America, 1931) on the Spanish-American war; and "Arms and the men," *Fortune*, IX (March 1934), p. 53. He also published in 1956 a critical appraisal of U.S. military history, *Arms and men, a study in American military history* (New York: G. P. Putnam's Sons, 1956).

⁸ Joseph Edgerton, "Defense of neighbors held essential to safety of the U.S., Continental plan advocated to make sure enemy would not seize weak country for basis of attack," *Washington Star*, November 27, 1938.

⁹ *The ramparts we watch* was also received in Latin America as an authoritative source ("an eminent military authority") of U.S. military policy and strategic thinking. It is significantly cited as the sole source of U.S. strategic thinking in a 1939 article of Haya

A host of other writers followed Eliot's lead. Wilbur Burton published an article in *Current History* in December 1938 entitled "Panama: defense problem no. 1." He argued that "...isthmian connection between the Atlantic and the Pacific — whether via Panama, Nicaragua, or Tehuantepec — far transcends commerce: it is vital for national American well-being." According to the author the main potential threat to the canal was "airplanes operating from floating carriers or from nearby land bases..." (Burton, 1938). It is interesting to note that the vulnerability of the Panama Canal to a covert Japanese air attack from a secret airstrip on Panamanian soil provided the plot for a serialized story by Robert Carson that was published in *The Saturday Evening Post*. Humphrey Bogart's 1942 Warner Brothers film *Across the Pacific*, with Mary Astor and Sydney Greenstreet, was based on Carson's story. This cloak and dagger story set in a Japanese ship and in Panama City never achieved the fame of Bogart's next film: *Casa blanca*.

On the other hand, the military historian and strategic thinker Harold Sprout argued that the U.S. should aim, as a "minimum requirement," at the "indisputable military control of all marine approaches to North America and Northern South America out to a distance greater than the effective operating radius of a hostile fighting fleet or carrier based airplanes..." He connected this strategic aim to the recommendation of the late 1938 Hepburn Board Report for bases in Puerto Rico and the Virgin Islands, noting that "the locus of the 1939 fleet maneuvers gave further emphasis to this new orientation" (Sprout, 1939, pp. 21-29). Norman J. Padelford developed a similar argument in "An Atlantic Naval Policy for the United States," stressing the need for an Atlantic fleet, naval and air bases and air power. He noted that,

The Bahamas, the Greater and Lesser Antilles, and Venezuela are vital to the United States. Here lie the keys to the security of the Panama Canal and the Central American states. From here come indispensable petroleum, tropical foods, and raw material required by American industry and consumers [Padelford, 1940, p. 1304].

de la Torre, the Peruvian politician, regarding the need to internationalize the Panama Canal. The article is reproduced under the title "Should the Panama Canal be internationalized?," in Robert J. Alexander, *Aprismo, the ideas and doctrines of Víctor Raúl Haya de la Torre* (Kent, The Kent State University Press, 1973), pp. 335-341.

This article was profusely illustrated with photographs of Santo Domingo (Dominican Republic), La Guaira (Venezuela), Cartagena (Colombia), San Juan (Puerto Rico), La Citadel (Haiti), and Guantánamo (Cuba).

In "Island Bulwarks," published in March 1940 by colonel Cary I. Crockett, the situation in Hawaii and Puerto Rico was reviewed and the dire social and economic difficulties of the latter stressed. This article was also accompanied by several photographs of San Juan Harbor, Spanish fortifications and country scenes. A caption of a photograph of the Puerto Rican countryside read "A crowded land brings social evils that may affect national defense," while a town scene depicting *jibaros* riding donkeys elicited the comment: "An American scene in Puerto Rico, where hunger may grow into violent unrest" (Crockett, pp. 372-383). By 1941, lieutenant commander Ephraim McLean wrote that "When all the new bases have been constructed and manned by units of our Army and Navy, Mahan's dream will have come true, for the Caribbean will then be an American lake..." (McLean, p. 952). The prolific defense analyst and *New York Times* military affairs correspondent, Hanson W. Baldwin, also underscored the importance of Caribbean bases. He proposed, among other things, the deployment of long-range bombers in Puerto Rico.¹⁰ An April 1939 article in *Harper's Magazine* by Oswald Garrison Villard, calling for "sanity" in defense policy, appeared anachronistic amidst the barrage of publications in favor of "preparedness."¹¹

The *National Geographic Magazine*, a reliable barometer of U.S. geostrategic interests (Lutz and Collins, 1993), also published long articles focusing on particular countries or subregions. In December 1939, the main article by E. John Long was entitled "Puerto Rico: watchdog of the Caribbean, venerable domain under American flag has new role as West Indian stronghold and sentinel of the Panama Canal." The first section had the heading "The Island's Strategic Location" and quoted the co-pilot of the Clipper plane that brought him to Puerto Rico as saying, while pointing to a map of the Caribbean,

¹⁰ See Baldwin (1941, pp. 105, 165, 217-218, 328-332; 1938, pp. 430-444; 1939, pp. 465-476; and 1941, pp. 449-463).

¹¹ He argued that armamentism would take the U.S. down the road of fascism. See Villard, 1939, pp. 449-456.

Now do you see? About 1 000 miles to the Panama Canal, 1 000 miles to Miami, 700 to Bermuda, 550 to Caracas on the mainland of South America, 650 to Trinidad. This is the hub of a wheel. Put enough planes here, and enough land to guard your bases, and Puerto Rico becomes the "Gibraltar of the West Indies," or the "Hawaii of the Atlantic" [Long, 1939, p. 697].

Interspersed with numerous photos of Puerto Rican scenery and everyday life, the author included several of fortifications, battleships, bases and military exercises. Interestingly, a detailed analysis on the Puerto Rican situation by Earle K. James published just two years previously by *Foreign Policy Reports* did not refer to strategic questions (James, 1937, pp. 182-192).

The *National Geographic* also devoted its main article of the January 1941 issue to the British West Indies. Its title was "British West Indian Interlude." The map of the Lesser Antilles had the title "Like a Curving Shield the West Indies Guard the Panama Canal," while the section with photographs read "West Indies Links in a Defense Chain" (Langley, 1941, pp. 1-46). That article was followed, in the same issue, by a brief report by Edward T. Folliard on Martinique. It discussed the French military presence in Martinique and Guadeloupe (Folliard, 1941, pp. 47-55). Other journals such as *Harper's Magazine*, *Survey Graphic*, *Hemisphere*, *Foreign Affairs* and *Inter American Quarterly* were also stricken by the Caribbean fever.¹²

Books such as Carleton Beals' *The coming struggle for Latin America* (1938), J. Fred Rippy's *Caribbean danger zone* (1940), and Walter A. Roberts', *The Caribbean: our sea of destiny* (1940), as their titles suggest, were part of the debate.¹³ For example, Beals' book, which went through several printings, dealt with the threat to U.S. security posed by the growing fascist influence in Latin America and the Caribbean. He devoted attention to Puerto Rico, arguing that U.S. policy toward the island undermined Roosevelt's claim to defend democracy in the

¹² See, for example, "Puerto Rico: Gibraltar or Achilles Heel," *Hemisphere* (February 1940), pp. 3-4; Lawrence and Sylvia Martin, "Outpost no. 2: The West Indies," *Harper's Magazine*, Vol. 182 (March 1941), pp. 359-368; James K. Eyre, "Martinique, a Key Point in Hemisphere Defense," *Inter American Quarterly* (October 1941), pp. 82-88; Charles Taussig, "The Caribbean," *Survey Graphic* (March 1941), pp. 146-148, 198-200.

¹³ Beals also published *America Faces South* (Philadelphia: J.B. Lippincott Co., 1938). For the many books that were published on the Caribbean and Latin America from a security angle, see Hines Calvin Warner, "United States Diplomacy in the Caribbean During World War II," Ph.D. dissertation, University of Texas at Austin, August, 1968, pp. 431-432.

hemisphere and exposed a weak flank to German propaganda. In this he coincides with the argument on Puerto Rico expounded by other liberals such as Oswald Garrison Villard.

...What we do in Puerto Rico is ever sharply scrutinized by other countries.

Actually the little island is ruled over by an appointed governor, safely protected, none ever quite so generally hated as the present Governor Winship. It is ruled over by American sugar companies, monopolizing the land in violation of the constitutional proviso limiting holdings to 500 acres. It is ruled over by a Congress made up mostly of lawyers and others representing the large American interests. It is ruled by a brutalized constabulary...

...Branded as "agitators" even by Secretary Ickes, harassed, jailed and murdered by the police, the Nationalists have retaliated, and violence has grown into violence, and bitterness into hatred. In this matter we have displayed the same dull colonial stodginess of any other imperialist power.

The head of the Nationalist Party, Pedro Albizu [sic] Campos (with whose partially medieval views I do not sympathize), has been railroaded to Leavenworth by a packed American jury [Beals, 1938, pp. 239-240].

The 1940 book edited by William H. Haas, *The American empire*, on the other hand, reviewed U.S. policy toward all its overseas territories. It underscored the acute problems and scant economic value of the U.S. Virgin Islands and Puerto Rico. With regard to the former, the editor stated in the concluding chapter that "although their prospects for the present may prove disappointing, we have the assurance that no other nation can readily avail itself of their strategic features." Similarly it highlighted the predominantly strategic military interests in continued U.S. control over Puerto Rico: "Recent developments in Puerto Rico also point to its increasing military importance to the United States. For the present at least, this outweighs all other considerations." Haas ruled out both independence and autonomy as a solution to the island's problem that he defined as overpopulation and poverty (Haas, 1940, pp. 378-380). The chapter on Puerto Rico, written by Rafael Picó and William Haas, outlines the serious economic and social ills of the island and flatly states "That autonomy or even complete independence would solve all Puerto Rican problems is far from true." It only advocated making elective the post of governor (Haas, 1940, p. 90). This is particularly illuminating given Picó's alignment with the emerging Popular Democratic Party.

The revision of U.S. war plans which began in 1938 also reflected the growing importance assigned to the Caribbean and the Atlantic. Throughout the thirties, naval forces in the Caribbean-Atlantic region amounted to a few ships of the Training and Special Service Squadrons. Plan Orange (war against Japan) only dealt with a possible threat to the Panama Canal from the Pacific. In November 1938, the Joint (Army-Navy) Board instructed the Joint Planning Committee to revise war plans in light of the new international circumstances.

The document drafted by Army col. Frank S. Clark and Navy capt. Russell S. Crenshaw and issued in April 1939 describes a strategic situation very similar to that later used for Fleet Problem XX, the fleet maneuvers held in the Puerto Rico-Virgin Islands in February, 1939: a fascist insurrection, supported by Germany and Italy, in a South American country. It thus placed great emphasis on the Caribbean as part of the hemispheric defense plans and already suggested the "Atlantic-first" strategy followed by the U.S. during the war (Yerxa, 1982, pp. 339-343).

The Joint Planning Committee also began working on the five crucial "Rainbow Plans" that were prepared during 1939 and 1940. Rainbow I, the only plan completed during the first phase of war preparations, "envisioned a German-Italian violation of the Monroe Doctrine that 'would force a direct confrontation with the United States. German and Italian forces presumably would establish 'intermediate bases' in West Africa and Brazil, while American units concentrated in the Caribbean to interdict Axis lines of communication" (Yerxa, p. 341). The lack of naval forces in the Pacific would trigger an attack on the Philippines and Guam. The U.S. would concentrate in the unilateral defense of its territory, the Eastern Pacific and South Atlantic, and Latin America to latitude 10 degrees South (*i.e.*, the Quarter Sphere concept). Yerxa quotes a Navy officer who claimed that "the critical point in the Rainbow I concept is the Caribbean" (Yerxa, 1982, p. 342). Rainbow IV was similar to Rainbow I, except that the U.S. would defend the entire hemisphere, while Rainbow V included the projection of military power to Africa or Europe (Yerxa, 1982, p. 341; Child, 1979, pp. 247-249). Rainbow IV was approved by FDR in mid-August 1940 and a revised version of Rainbow V was ready by November 1941 (Francis, 1945, p. xv). During this period most existing war plans for the occupation of Latin American countries were aban-

done, with the significant exceptions of Mexico (War Plan "Green") and Brazil (War Plan "Purple") (Child, 1979, 239-247).

Understandably, defense planning for Puerto Rico gathered momentum during 1939. In July 1938, the Commanding General of the II Corps Area of the Army ordered the preparation of a defense plan for Puerto Rico. The Puerto Rico Defense Plan (code named "Orange") was submitted on 27 October 1938. It provided only for the defense of the main island of Puerto Rico, excluding outlying islands. Immediately after the Fleet XX maneuvers (in May 1939), the Joint Planning Committee submitted to the Joint Board a statement on the Puerto Rico-Virgin Islands area which placed great emphasis on their strategic value. It also recommended assigning this area the following missions (Francis, 1945, pp. 5-6):

1. Joint Mission: To defend the Puerto Rico-Virgin Islands area as an outlying base; to support the naval forces in controlling the Caribbean Sea and adjacent waters; and to support operations against shore objectives.

2. Army Mission: To hold Puerto Rico and the Virgin Islands against attacks by land, sea and air forces, and against hostile sympathisers [*sic*]; to install and operate required Army base facilities; to support the naval forces in controlling the Caribbean Sea and adjacent waters: and to support operations against shore objectives.

3. Navy Mission: To support the naval forces controlling the Caribbean area and adjacent waters; to control and protect the shipping in the coastal zone; to support the Army in the defense of Puerto Rico and the Virgin islands; aid to support operations against shore objectives.

The Joint Planning Committee recommended that the Army should create a separate overseas department and the Navy a new naval district in Puerto Rico. Within these parameters, the Joint Puerto Rico Coastal Frontier Defense Plan, the Puerto Rico Defense Project and the revision of Plan White (against domestic disturbances) were drafted. This strategic planning process culminated in the comprehensive Puerto Rican Department Basic War Plan, 1941, of 19 February 1941, and the Puerto Rican, Defense Project of 1 March 1941 (Francis, 1945, pp. 9-73).

PUERTO RICO IN THE HEPBURN BOARD REPORT

The U.S. Navy had not carried out a major study on base requirements since 1923, when the Rodman Board Report was prepared. Naval war planning during the pre-World War I period had mainly focused on a possible German threat to U.S. possessions in the Caribbean and to the Panama Canal. Germany, in fact, had elaborated a very detailed plan for the occupation of Puerto Rico (Kennedy, 1985, pp. 39-74; Estades, 1988, pp. 65-73). In the Asia-Pacific region, Plan Orange dealt with war against Japan. Britain was also considered a potential enemy, but, given the extent of U.S.-British collaboration, war with Britain was highly unlikely. During World War I, naval collaboration with Britain was further enhanced. Even the possibility of a major German naval attack in the Atlantic-Caribbean region was remote as long as Britain maintained naval supremacy in the North Sea. In such circumstances, Germany's naval operations would have to rely mainly on submarine warfare.

After World War I, the U.S. enjoyed an even more favorable strategic environment. Germany's naval power had been eliminated. Britain accepted U.S. naval and military supremacy in the Caribbean, while the U.S. practically placed British and other European colonies in the region under its security umbrella. In addition, the Washington Naval Conference (1921-1922) had placed strict limits on the size of the navies of the U.S., Great Britain, Japan, France, and Italy.¹⁴

Thus, the residencies of Harding, Coolidge and Hoover (known as the Republican Restoration) were characterized by great parsimony in naval expenditures. Also, strategic concern after World War I understandably shifted from the Atlantic back to the Pacific and to Japan's naval might.¹⁵ It was FDR who began to reverse the trend in 1933 in the direction of renewed naval expansion. Dexter Perkins relates this "strategic vacuum" to changes in U.S. Caribbean policy during the late twenties and early thirties.

¹⁴ The treaties signed 6 February 1922 established a ratio of 5:5:3, respectively, for U.S., Britain, and Japanese battleship and carrier tonnage, allotted 1 3/4 to France and Italy, prohibited the construction of new battleships for a ten years period, and limited their maximum tonnage (Morison, 1963, p. 6).

¹⁵ In 1924, the director of the Navy's War Plans Division concluded that Japan was a more likely enemy than Britain and that strategy should be "Pacific-first". By 1927, the general Board was of the opinion that there was almost no possibility of war with Britain (Yerxa, 1982, p. 245).

Per contra, it is significant that with the defeat of Germany, the Caribbean policy of the United States underwent a substantial revision. The sea power of the Reich had been destroyed; there was no European state that could or would challenge the position of the United States in the waters controlling the approaches to the Canal, and this fact explains why the Monroe Doctrine underwent substantial revision in late twenties and early thirties. The Roosevelt corollary was gradually abandoned ...[Perkins, 1961, p. 24].

The Rodman Board Report reflected the post-World War I situation. It stressed the great strategic importance of the Panama Canal and the entire Caribbean geostrategic space. However it did not consider that threats to the region warranted the construction of a major base for the U.S. fleet. If eventually required, it could be constructed in Panama. Neither did it recommend a major expansion beyond the existing base system (Dexter, pp. 256-257). The Hepburn Board was created by the Naval Expansion Act of 17 May 1938. The senior member of the board, admiral A. J. Hepburn, had been Leahy's classmate. The board consists of two rear admirals, three captains and one commander.¹⁶ The report was submitted to the chief of naval operations admiral William D. Leahy on 1 December 1938 and to Congress the following 3 January by Claude Swanson, secretary of the Navy. It reflected the greatly enhanced strategic importance attached to Puerto Rico and the Caribbean in the ongoing strategic debate in the U.S.

While agreeing with the strategic outlook contained in the Rodman Board Report, it stressed: 1) that the greatest need for additional bases was in the Atlantic-Caribbean region as "...the United States Fleet has been based in the Pacific during recent years, when the expansion of the air force has been most rapid, the growth of air bases, to serve the fleet, has been almost wholly in that area...;" and 2) that air and submarine bases were urgently required (*Report on the need...*, pp. 4-15).

Regarding Puerto Rico it said:

In its study of the Caribbean the Board found only one site capable of being made into an air base suitable for the normal operation of patrol planes. This is at Isla Grande, in the harbor of San Juan, Puerto Rico... In addition

¹⁶ Rear admiral A. J. Hepburn, senior member, rear admiral E. J. Marquart, captain James S. Woods, captain Arthur L. Bristol, Jr., captain (Civil Engineering Corps) Ralph Withman, commander William E. Hilbert, recorder.

to its suitability for patrol planes, the site offers suitable area for the construction of a landing field and facilities for the training of one or more carrier groups. A base for patrol planes situated this far eastward in the Caribbean will be of major strategic importance. The Board understands that negotiations are in progress to have the site transferred by the insular government to the jurisdiction of the Navy [*Report on the need...*, p. 16].

Consequently, the report recommended:

(a) Facilities for one carrier group (planned with a view to expansion to two carrier groups), (b) Facilities for two patrol-plane squadrons (original plans for this station must provide for immediate emergency expansion for at least four patrol-plane squadrons), (c) Facilities for complete engine overhaul, (d) Construction breakwater at harbor entrance, [and](e) Berthing at pier for one carrier [*Report on the need...*, p. 16].

Expansion or construction of air and naval facilities in Guantánamo and the U.S. Virgin Islands was also proposed, but in a scale smaller to those of Isla Grande.

Similarly, the board advised the creation of a submarine base at Isla Grande (*Report on the need...*, p. 30):

The Board previously in this report has recommended the establishment of an air base in San Juan. Necessary wharfage for submarines can be readily provided at the air base without interference with air activities.

129. The Board recommends that submarine berthing be provided at Isla Grande and that an adequate supply of fuel be established.

The only two other sites in the Caribbean mentioned as possible submarine bases were Key West and the U.S. Virgin Islands. However, new construction was recommended only in the case of San Juan.

The board prepared four lists of new bases: air, submarine, destroyers, and mines. Each list was further subdivided into Category A (for earliest completion) and B (for later completion). No Caribbean bases for destroyers and mines were proposed. In the lists for air and submarine bases, Isla Grande appeared in Category A. In the air bases list, Isla Grande appeared in fourth place of a total of 15, followed by Panama. In the submarine bases list, it occupied second place (after Guam) of five sites. Additionally, the Isla Grande project was the most costly (\$9 300 000) of all that were eventually approved by Congress

in late February 1939.¹⁷ The board left no doubt of the importance it ascribed to the San Juan bases. The final commentary of the report said:

There are certain projects, however, which the Board has no hesitation in selecting because of their immediate strategic importance as being necessary for accomplishment at the earliest predictable date and without regard of the expansion contemplated by the Act of May 17, 1938. These items are: Kaneohe Bay, Midway Island, Wake Island, Guam, Johnston Island and Palmyra Island in the mid-Pacific area; Kodiak and Sitka in the Alaskan area; and San Juan, Puerto Rico, in the Atlantic area. In addition, the immediate increase of training facilities at Pensacola, Fla., is mandatory [*Report on the need...*, p. 56].

The importance of Isla Grande was further enhanced by the congressional decision to reject major base construction in Guam.

The Isla Grande Project, when considered in historical perspective, was the largest investment the U.S. had made in military infrastructure in Puerto Rico since it had obtained control of the island in 1898. It placed the island firmly on the road of the ambitious defense plans that were rapidly implemented during the early 1940s and highlighted the prominent role that was being assigned to Puerto Rico in U.S. Atlantic-Caribbean strategy. Ironically, it would be very rapidly superseded by naval demands for even more bases and installations in the island as a result of Fleet Problem XX. The Army, and particularly the Air Corps, also had plans for the construction of major facilities in Puerto Rico.¹⁸ The *Economic Review* journal took note of the rapid enlargement of military construction plans for Puerto Rico and their potentially favorable impact in the economy.

Recent moves on the part of the military and naval authorities in Puerto Rico make the general outlines of the Government's plan clear enough.

¹⁷ "La Cámara aprobó la base naval para Puerto Rico", *El Mundo*, 24 February 1939, p. 1.

¹⁸ "As early as January 1939, the Panama Canal Department recognized the urgent need for bases in other parts of the Caribbean region. These bases would permit advance warning of an enemy attack and would enable the Army Air Corps to engage hostile aircraft before they could strike the Canal. Nature has favored the Caribbean by providing a chain of islands extending from Cuba southeast to the northern coast of Venezuela. These islands offered natural sites for air bases to guard the Caribbean approaches to the Panama Canal" (Hupperich, in Huck and Edward, 1970, pp. 131-132).

The notion that Isla Grande Airport, Pan American Airway's terminal, would be the center of operations, has gone into discard. It seems clear that the Army will locate its principal flying fields, shops and training quarters at some distance from the capital city and that the Navy will base no more than a squadron of reconnaissance planes at San Juan proper. It is also clear that the port of San Juan, regardless of where the military establishments are built, will be the heart of the military circulation system as far as supplies are concerned, and unquestionably the strategic moves of both the Army and Navy mean greatly increased tonnages at San Juan's docks. They also mean the establishment of considerable personnel at San Juan...¹⁹

The urgency for Caribbean bases is understandable in view of the intense strategic debate that was taking place in the U.S., and the "lessons" derived from the fleet maneuvers of 1939.

FLEET PROBLEM XX

Fleet Problem XX was specifically designed to identify naval and military requirements in the Caribbean and the Atlantic. In May 1938, Roosevelt, using New York's World Fair as a pretext, ordered the fleet to transit through the Panama Canal and visit eastern ports to await the coming maneuvers. The maneuvers were again discussed by FDR and Leahy during a November meeting in the White House (Adams, 1985, p. 100).

According to Fleet Problem XX's war hypothesis, a fascist revolt had occurred in Brazil (Green). Germany (White) dispatched a convoy across the Atlantic to aid the rebels. The United States (Black) issued a diplomatic note of protest, ordered its fleet to transit the Panama Canal and deploy in the waters between Cuba and Haiti. Black eventually declared war. Vice admiral Adolphus Andrews was placed in command of the Black Fleet, while the attacking White Fleet was commanded by admiral Edward C. Kalbfus.²⁰ The scenario of the maneuvers was based on discussions on the international and Latin American situation in the State-War-Navy Standing Liaison Commit-

¹⁹ "Puerto [sic] Sees Bright Future as Major Defense Area in Caribbean," *The Economic Review*, June 1939, p. 27.

²⁰ For a general description of the maneuvers, see Abbazia, 1973, Chapter 3, "A mirror to war: Fleet Problem XX."

tee. The strategic problem had been posed by Under Secretary of State Sumner Welles during the meeting of 14 November 1938.

On the same day (14 November) that Roosevelt asked for a tripling of the Army Air Corps, the Standing Liaison Committee was discussing the latest disquieting news from southern South America. Under Secretary of State Sumner Welles informed his counterparts from the War and Navy Departments, Chief of Staff Malin Craig and Chief of Naval Operations William Leahy, that State Department officers in Brazil were expecting German-instigated rebellions to occur soon in Uruguay, Argentina and Brazil — all “as part of a large Nazi movement to obtain control of those countries.” What Welles wanted to know was, if these fears turned out to be real, would the navy be capable of heading off any “filibustering” activities on the East coast. Leahy thought so, assuming it could use Brazilian ports. For the next month, the administration studied Brazilian developments closely. According to Harold Ickes, the cabinet devoted much of its meeting of 16 December to the “very serious situation in Brazil”. The Nazis there are up to mischief, undoubtedly with the encouragement, if not the active backing of Hitler. They are also very active in Uruguay [Haglund, 1984, p. 99].

This same scenario was again portrayed by Sumner Welles in January, 1939, during another meeting of that committee (Child, p. 249). It guided war planning towards Brazil (“War Plan Purple”) during the late 1930s and early 1940s.

The President has directed the preparation of a war plan “PURPLE”, under the following assumptions: Quote —GERMANY joined by ITALY has successfully conducted a war against ENGLAND and FRANCE. The British and French fleets have been destroyed or dissipated and are no longer a factor to be considered. British and French colonies and dominions in the Western Hemisphere are no longer under British and French protection and their final disposition is awaiting the action of a peace conference. CANADA, BRITISH and FRENCH GUYANA and NEWFOUNDLAND have proclaimed their independence and have asked the UNITED STATES for protection under the Monroe Doctrine. The British and French Islands in the Caribbean area are still nominally under British and French control. The 1st and 6th Divisions, U.S. Army (full peace strength) have reinforced the garrison at Porto Rica [sic] [...] A civil war exists in BRAZIL. Federal Forces (north) are opposed to rebel forces (south) along a general line east and west through SÃO PAULO. GERMANY and ITALY have established bases of operations in the CAPE VERDE and CANARY ISLANDS off the African coast. They are reinforcing the rebel front by furnishing men and munitions in such quantities and under such

conditions as to constitute a definite economic and political penetration of the SOUTH AMERICAN continent and a violation of the Monroe Doctrine. ARGENTINA has aligned itself with the rebel forces. Other South American countries are neutral but are sympathetic to the aims and purposes of the United States. JAPAN is intensely engaged in the expansion of her interests in the Western Pacific [Rogers, 1940, pp. 6-7].

There was sharp concern in Washington during 1938 with the stability of the Getúlio Vargas government in Brazil due to fascist and German activities in that country. In March, general Pedro Aurelio de Goés Monteiro, considered an ultraconservative officer and former fascist sympathizer, had called for Vargas' resignation. The Ação Integralista Brasileira, a fascist party that had backed Vargas' Estado Novo in 1937, unsuccessfully tried to carry out a coup and kill the president on 10-11 May 1938. U.S. intelligence sources informed Germany had directly assisted this ploy.

Brazil was considered of particular strategic importance because, among other things, its northeast "bulge" could be reached by air from bases in northwest Africa. A German presence in Brazil was seen as directly threatening U.S. interests in the Caribbean and the Panama Canal. The Chilean *nacistas*, on the other hand, staged a bloody rebellion in September against the conservative government of Arturo Alessandri in Chile. Fascist and Axis activities throughout Latin America became a major source of preoccupation in Washington during this period. The December 1938 Inter American meeting in Lima, convened at the behest of the United States, had the purpose of counteracting perceived fascist subversion (Haglund, 1984, pp. 82-89; Frye, 1967, Ch. 7-8).

Thus, Fleet Problem XX focused strategically on the interrelationship between the Brazilian bulge (the Natal area) and the Southern Atlantic, on the one hand, and the Caribbean region, on the other. The maneuvers, though mostly centered in the Puerto Rico-Virgin Islands zone, involved a large maritime area ranging from Cuba to the Lesser Antilles. Exercises took place in the following locations: Marie Galante, Guantánamo, Culebra, Vieques, St. Thomas, St. Croix, Monserrat, Antigua, Mona, Ponce, Guayanilla, Rincón, San Juan, Samaná, Bahamas... Several air raids and naval attacks on San Juan harbor were staged. The Vieques Sound also saw much naval action. In the Dominican Republic, Samaná Bay was the site for air, naval, submarine, and

mine laying exercises.²¹ The ships Raleigh, Reid, and Cummins with three other ships and fifty planes were in Samaná in March.

It should be noted that the maneuvers also had a political dimension since they were used to strengthen military and political ties to the Trujillo regime in the Dominican Republic. The massacre of thousands of Haitians in the Dominican border in 1937 by Trujillo was no longer an obstacle to warm relations. Trujillo used the presence of the cruiser Texas and forty-two USMC planes to rename as "U.S. Marine Corps" a section of Trujillo Avenue (the important waterfront avenue in Santo Domingo). The other section he had previously named "George Washington." This was done in a military ceremony in which two companies of marines, with their music band, participated together with Dominican soldiers.

At last, on February 1939, Brigadier General Upshur and Colonel Roy S. Geiger could visit Santo Domingo since they were participating in naval maneuvers near Puerto Rico. The cruiser Texas and about 42 planes came to Santo Domingo for the ceremony. A large number of marines were aboard the ship [Vega, Bernardo, 1992, p. 228].

Trujillo also decorated with a medal FDR's son, Colonel James Roosevelt, while the maneuvers were taking place.²²

The Caribbean political situation — in this case the Puerto Rican — made itself felt in other ways during Fleet Problem XX. The news summary for 20 February prepared in the USS Houston, which carried FDR and Leahy, included the following dispatch as the main news item:

Washington. The Government had a recommendation from the American Civil Liberties Union today for investigation of what were called "deplorable conditions" in Colonial Administration.

The Civil Liberties group asked a chance for Puerto Rico to vote on Independence and for both Puerto Rico and Hawaii to vote on Statehood.

A new administration for Puerto Rico, citizenship for the natives of Samoa and Guam, extended native participation in the Virgin Islands

²¹ For the itinerary of the maneuvers, see "Memorandum, Subject: Chronological Record of Contacts and Events," FDR Library, FDR Papers, OF 200, Container 49, Folder 200-MMM; also, "Hostile planes raid Puerto Rico," *New York Times*, February 26, 1939.

²² For the rapprochement with Trujillo during Fleet Problem XX, see Vega, Bernardo, pp. 228-230.

Government and native language schools for Guam, Samoa and Puerto Rico were other recommendations.²³

FDR received an invitation on 23 February from Governor Winship to visit him in Puerto Rico which he politely refused, on the grounds that his itinerary depended on the maneuvers.²⁴

The maneuvers ended on 27 February with a major naval battle about 100 miles to the north of Puerto Rico. FDR reviewed in Culebra the results of the maneuvers with admirals Leahy, Bloch, Kalbfus and Andrews. He also observed a USMC landing exercise in Flamingo Beach in that island. Among the conclusions derived from the experience, it: 1) reaffirmed the importance of the Caribbean and the Atlantic, 2) underscored the need to enjoy air supremacy, and 3) emphasized the urgent need to obtain bases in the Caribbean (Abbazia, 1973, Ch. 3; Yerxa, 1982, pp. 335-339). Admiral Adolphus Andrews, Black commander, informed the President that "some means [must] be found to provide fortified and well secured bases in this most important strategic area." He also recommended to Admiral Claude C. Bloch, Commander in Chief of the fleet, that,

In view of the present world conditions, the importance of the West Indian area to our national defense, and the maintenance of our national policies, and the lack of bases therein, it is high time that corrective measures be taken. Not only should provision be made for suitable bases in areas now under American jurisdiction, but steps should be taken that would insure the availability of certain other harbors and facilities to our planes and vessels [Yerxa, 1982, p. 339].

As if further to underscore the national existing security consensus, the State Department issued on 28 February the following statement by Senator Sheppard, Chairman of the Military Affairs Committee, which was received in Houston:

He declared that to permit Panama, Hawaii, Puerto Rico, or Alaska to fall to an enemy would jeopardize the security of the continental United States. He said: "A violation of the Monroe Doctrine would probably not occur as

²³ USS Houston Evening Press News (2-20-39), FDR Library, FDR Papers, OF 200, Container 49, Folder 200-MMM.

²⁴ "Naval aide to the president, a Blanton Winship," 25 February 1939, FDR Library, FDR Papers, OF 200, Container 48, Folder 200-III.

a sudden overt act. It could easily take the form of a step by step movement of a peaceful penetration by foreign nations until definite and powerful minorities would be established with the result that before military force replaced diplomatic negotiations hostile nations might already have a foothold in areas that would threaten the most important link in our entire system of defense, the Panama Canal...²⁵

As we have seen, the urgency for an expanded and strengthened base structure in the Caribbean, including the construction of new facilities in Puerto Rico and the Virgin Islands, had already been expressed in the Hepburn Board Report of December, 1938.²⁶ The Army and Navy would use the juncture of the Fleet Problem XX maneuvers to make demands for additional bases and resources considered vital for the defense of Puerto Rico and the Caribbean. According to Abbazia, Fleet Problem XX placed FDR firmly on the road to the destroyers-for-bases agreement with Great Britain (Abazzia, 1973, p. 49). At the conclusion of the exercise, Roosevelt also informed his Chief of Naval Operations, William D. Leahy, that he would be named governor of Puerto Rico to succeed the aging and problematic general Blanton Winship. It would be one of Leahy's major tasks as governor of Puerto Rico to oversee war preparations in that island, the hub of the envisaged regional naval and military arrangement, from a military and, particularly, from a political perspective. In many ways, the U.S. "rediscovered" Puerto Rico and the Caribbean during the period 1938 to 1941, but this rediscovery took place through "geostrategic eyes," to paraphrase the title of a recent book (Pratt, 1992). Thus, the intense strategic debate is crucial to an understanding of the formulation of foreign and military policy toward Puerto Rico and the entire region during the prewar and war periods.

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²⁵ State Department Bulletin, no. 48 (28 February 1939), p. 4, FDR Library, FDR Papers, OF 200, Container 49, Folder 200-MMM.

²⁶ Among the priority recommendations of the Hepburn Board were the construction of a secondary naval air base with berthing facilities at San Juan. It also called for an expansion of the St. Thomas naval air base and the retention of a submarine facility there. This was followed by the more ambitious and sweeping recommendations for new base facilities contained in the *Greenslade Report* of January, 1941. (Yerxa, pp. 336, 355).

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