

Leadership Under Extreme Conditions: A Human Resource Analysis of Ernest Shackleton's Expedition

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Abstract

This paper analyzes Sir Ernest Shackleton's leadership during the Imperial Trans-Antarctic Expedition through a human resource management lens, using the Investors in People framework. Despite the expedition's failure to achieve its original goals, Shackleton's people management turned a potential tragedy into a historic example of leadership under extreme adversity. The analysis reveals a high degree of maturity in inspiring and motivating people, fostering trust, and maintaining morale through transparency and empathy. However, the assessment also highlights critical gaps in delegation, leadership development, and participative decision-making. Shackleton's approach is ultimately characterized by emotional intelligence, adaptability, and resilience, yet constrained by overcontrol and insufficient foresight. The paper concludes with actionable recommendations to strengthen empowerment, feedback culture, and transparency — insights that remain highly relevant for contemporary leaders navigating crisis, uncertainty, and complexity in organizational environments.

Introduction

In 1911, Norwegian explorer Roald Amundsen reached the South Pole ahead of Britain's Robert Falcon Scott, who died in the attempt. It was a massive setback for the British, who had dominated the exploration world up to that point. Eager to restore their reputation, Sir Ernest Shackleton launched the *Imperial Trans-Antarctic Expedition* (ITAE) in 1914 with 27 other crew members, aiming to cross the continent from sea to sea. At the dawn of World War I, this ill-fated expedition marked the end of the great era of polar exploration.

More than a century later, Shackleton's expedition is widely studied as a case of crisis leadership and remains highly relevant in today's uncertain, rapidly changing world. Although the mission failed, he brought every crew member home alive, a testament to his remarkable physical, psychological, and organizational adaptability under extreme conditions.

This report uses Shackleton's expedition to explore how leadership behaviours shape a team's risk posture and adaptive capacity in environments dominated by uncertainty. To structure this analysis, the report uses the Investors in People (IiP) framework as an analytical structure, grouping observed behaviours across key people-management indicators to surface patterns that illustrate how leaders influence possibilities under extreme conditions.

Background: Timeline of the Expedition

1914 – Departure

Sir Ernest Shackleton set sail aboard the Endurance with 27 men, aiming to cross Antarctica from the Weddell Sea to the Ross Sea. The expedition departed London in August 1914, shortly after the outbreak of World War I.

January 1915 – Trapped in Ice

While navigating the Weddell Sea, the Endurance became trapped in pack ice before ever reaching the continent. For months, Shackleton maintained morale through routine, optimism, and direct engagement with the crew to prevent psychological decline during prolonged immobility.

October–November 1915 – Leaving the Ship

After being crushed by the ice, the Endurance sank on 21 November 1915. Shackleton ordered the men to establish Ocean Camp on the ice and reframed the mission to focus on survival and returning home. He led by example, sharing rations and hardships equally to reinforce solidarity and fairness.

April 1916 – The Open-Boat Journey

As the ice broke apart, the crew launched three lifeboats and reached Elephant Island. Knowing rescue was unlikely, Shackleton selected five men to accompany him on an 800-mile journey across the stormy Southern Ocean in the 22-foot *James Caird* to reach the whaling stations of South Georgia, one of the most demanding small-boat voyages in recorded history.

May 1916 – Crossing South Georgia

After two weeks at sea, Shackleton's team landed on South Georgia's uninhabited coast. Shackleton, Worsley, and Crean then trekked for 36 hours across the island's glaciers to reach help at Stromness Station without maps, rest, or proper mountaineering equipment.

August 1916 – Rescue of the Crew

Following several failed attempts blocked by sea ice, Shackleton finally rescued all 22 men stranded on Elephant Island on 30 August 1916. Every crew member survived after nearly two years of isolation.

1917 – Return to England

The crew returned to England amid World War I. Though the expedition never achieved its geographic objective, Shackleton's leadership became a timeless model of resilience, morale management, and crisis navigation, continuing to inform modern leadership research.

Methodology

This paper uses the Investors in People (IiP) framework to structure the analysis of Shackleton's leadership and people practices during the Imperial Trans-Antarctic Expedition (1914–1917), organizing the evidence into clear themes that support a focused and coherent examination of his behavioural patterns.

The framework is organized around three main pillars:

- **Leading** – how leaders inspire, motivate, and provide direction.
- **Supporting** – how people are empowered, involved, and trusted to perform.
- **Improving** – how the organization builds capability and continuously develops its people.

Each pillar includes a set of indicators described across five maturity levels:

- Not met
- Developed – in place and understood
- Established – engaging and activating
- Advanced – generating positive outcomes
- High-Performing – embedded and always improving

Shackleton's leadership behaviours and decisions are analyzed qualitatively against these indicators. Evidence is drawn from documented accounts by expedition members and biographical sources to classify Shackleton's “organization” (the Endurance crew) within each area based on observed behaviours. This structured approach allows historical leadership behaviours to be examined systematically without equating outcomes with correctness or causal effectiveness, supporting the extraction of broader insights about leadership practice under extreme uncertainty.

All facts in this report are extracted from a series of books written by, or based upon the writings of, members of the expedition: (Alexander, 1998), (Fisher & Fisher, 1957), (Huntford, 1975), (Hurrey, 1948), (Hussey, 1949), (Lansing, 1959), (Mill, 1923), (Orde-Lees, 1916), (Shackleton, 1919), (Smith, 2015), (Worsley, 1924) and (Worsley, 1931).

Findings and Analysis

Leading

Creating Transparency and Trust

The objectives of the ITAE were unambiguous and outcome-oriented: crossing Antarctica from the Weddell Sea to the Ross Sea, documenting the journey, and restoring Britain's polar prestige (The Times, 29 December 1913).

Shackleton reinforced this clarity by consistently providing a coherent vision to his crew, from recruitment onward. Even if his famous newspaper advertisement is likely apocryphal, its spirit captures his approach: "*Men wanted for hazardous journey. Low wages, bitter cold, long hours of complete darkness. Safe return doubtful. Honour and recognition in event of success*" (Watkins, 1949). Shackleton received many applications and deliberately filtered out the "mad" and "hopeless" applicants who did not fit the culture he intended to build. Moreover, his clarity increased as conditions deteriorated. When it became obvious the expedition had shifted from exploration to survival, Shackleton reframed the mission's purpose with equal unambiguity: return to civilization alive.

Trust-building came primarily through Shackleton's personal engagement. He spoke individually with crew members, showed genuine interest in their strengths, and consistently placed their welfare above his own. This behaviour contributed to a strong pattern of trust and loyalty. As Worsley later wrote in 1931, "*We would have gone anywhere with him without question just on his order.*" Such devotion is not accidental; it reflects a durable pattern of relational leadership built on credibility, fairness, and emotional awareness.

As a result, crew members accepted high-risk decisions with remarkable confidence, such as sliding down a South Georgia slope in the cold and dark, because they interpreted reassurance, competence, and benevolence from their leader's past behaviour. The crew's later willingness to rejoin him on future expeditions further illustrates the depth of this trust, showing a durable form of trust capital, rather than mere situational compliance.

From a human-resource perspective, within the IiP framework, these behaviours show characteristics of the **High-Performing** level in how clarity, consistency, and relational reliability were handled.

Motivating People to Deliver the Organization's Objectives

Shackleton recruited most of his men within minutes of meeting them, so it is unlikely that the crew began the expedition with an in-depth understanding of the mission's objectives. However, once on board, he compensated for this initial gap by communicating goals clearly and ensuring the crew understood what they needed to do to achieve them. A clear example is how the men immediately jumped overboard with picks and shovels when a crack appeared in the ice, enlarging it to free the ship and reach open water. They also recognized the lifeboats as their "*ultimate salvation*", demonstrating alignment between stated purpose and operational behaviour.

A distinctive strength of Shackleton's approach was his reliance on observable evidence rather than authority alone. He routinely measured distances, calculated food requirements, and adjusted course accordingly, modelling a literal version of the PDCA (Plan–Do–Check–Adjust) cycle. This rational framing increased understanding and reduced ambiguity, enabling commitment even under extreme uncertainty.

Shackleton also motivated his team by addressing their fundamental needs: physiological, safety, love and self-esteem (Maslow, 1943). He recognized that in a survival context, psychological stability was a prerequisite for physical endurance. His practice of serving hot meals whenever a man showed signs of weakness, without revealing who was struggling, preserved dignity while restoring morale. When the ship was abandoned, Shackleton managed the emotional transition with equal care: raising awareness, easing acceptance, reducing anxiety by stepping beyond his formal role, and providing reassurance through constant presence and optimism. Eventually, the crew internalized and embraced their new mission of returning home by other means.

His influence extended beyond routine motivation. Through emotional containment, personal courage, and relentless optimism, he reinforced behaviours that supported cohesion and endurance. The 36-hour crossing of South Georgia with two exhausted men — who followed him without complaint — illustrated the extent to which his leadership shaped behaviour. As Worsley wrote, they followed "*the example of [their] leader, did [their] utmost to avoid any cause of annoyance*" (Worsley, 1924).

From a human-resource perspective, these behaviours show characteristics of the **High-Performing** level in how motivation and emotional support were handled.

Developing Leadership Capability

Frank Wild, Second in Command, carried a substantial share of operational tasks, and the crew trusted him. However, when left in charge on Elephant Island, he revealed significant gaps in leadership and management capability. For example, he failed to gather sufficient food to prepare for the winter, relying instead on the continued presence of seals and penguins. When the animals migrated, tensions and stress rose among the men.

Similarly, Captain Frank Worsley, though highly skilled as a navigator, was often wild, erratic and impulsive. Shackleton frequently felt the need to monitor him closely and eventually reduced his authority after he failed to maintain discipline during the trip to Buenos Aires (at the beginning of the expedition). This pattern illustrates a broader issue: Shackleton's deputies had specialized strengths but lacked balanced leadership competence.

Line managers are crucial enablers of change (Paauwe et al., 2013), yet they failed to meet expectations because Shackleton overlooked their leadership limitations during recruitment, influenced more by compelling personalities and narrative appeal than by managerial capability.

From a human-resource perspective, these behaviours show characteristics of the **Not Met** level in how leadership capability was developed.

Overall Performance Review

The behaviours observed for the *Leading* pillar show characteristics of the **Advanced** level within the IiP framework.

In a “High-performing” organization, managers would know precisely the extent to which they are expected to lead, manage, and develop their people. Shackleton would also have recruited more capable managers and made his expectations explicit. Such managers would be predictable and would proactively encourage feedback from their people.

Supporting

Empowering People

Shackleton provided support and information so that his people could work effectively and develop their skills. For instance, when a seaman made a mistake while manoeuvring the ship and expected Shackleton to be furious, he quietly helped him correct the error and never mentioned the incident again. Shackleton understood that his men were learning, and dwelling on mistakes would only undermine confidence.

However, these behaviours only show characteristics of the **Developed** level in how autonomy, responsibility, and individual initiative were handled. Indeed, Shackleton was omnipresent on the ship and constantly requested updates, leaving little room for autonomy. In the rare cases where others took matters into their own hands, he often reprimanded them. For example, when Frank Hurley, the photographer, returned to the ship to retrieve negatives, Shackleton issued a severe scolding, even though handling films and photographs fell squarely within Hurley's responsibilities. Shackleton was similarly reluctant to delegate leadership tasks; he even refused to let others resolve issues while confined to his tent with acute sciatica.

This discomfort with independent action may be linked to Shackleton's military background and a era that placed less emphasis on participative leadership than today.

Participating and Collaborating

Wild, Worsley and Hurley were regularly consulted on strategic decisions (Hurley was included in this "directive committee" largely so that Shackleton could keep an eye on him). Nevertheless, Shackleton consistently retained final authority and rarely integrated dissenting views. For instance, he ordered a march toward Paulet Island despite Worsley's strong objections, and later insisted on attempting another march even when sentiment among the group was divided.

With the rest of the crew, Shackleton often acted unilaterally, without consulting those directly affected. Despite whalers advising him to wait because of dangerous ice floes, he chose to depart for Antarctica without sharing this information — a move that ultimately sealed their fate. He also ordered the killing of most animals during the journey, including the dogs and the carpenter's cat, a decision that intensified resentment and had a profound emotional impact on the crew.

In summary, Shackleton did consult a small circle of representatives, but he frequently discounted their input and proceeded independently. Consequently, these behaviours show characteristics of the **Developed** level in how participation, consultation, and collective input were incorporated into decision-making.

Making Decisions

During the expedition, Shackleton repeatedly gave his people some responsibilities. On “Ocean Camp”, he divided the crew into five tents. He put people with strong character at their head and trusted them to ensure discipline and maintain high morale. Also, when he had to depart Elephant Island, he left Wild in charge of watching his interests “*on [their] return to England,*” saying that he had “*every confidence in [him]*” (Lansing, 1959). He similarly asked Hurley to take full responsibility for managing the films and negatives. Shackleton trusted these men to make the right calls, but he did not involve them in defining the scope or limits of the authority he delegated, and he did not always respect their prerogatives.

However, Shackleton was not open and transparent about sharing information. As discussed above, he withheld the whalers’ warnings about ice conditions. When the crew failed to free the Endurance from the pack ice, he feared the expedition was over, yet he told them it was merely a delay. These behaviours reflect a consistent reluctance to disclose reasoning, risk assessments, or uncertainty, even when greater openness might have supported better collective judgement.

He also closely monitored those who challenged him, limiting their ability to express dissent. After McNeish (the carpenter) confronted him, Shackleton deliberately distanced him from the rest of the group. This pattern was systemic: on Elephant Island, Orde-Lees (skier and motor expert from the Navy) grew deeply frustrated as Wild routinely dismissed his suggestions (Orde-Lees, 1916). By suppressing contrary views rather than channelling them constructively, Shackleton reduced the team’s access to alternative thinking at a time when adaptation was critical to survival.

These behaviours show characteristics of the **Developed** level in how judgement, information sharing, and dissent were handled in practice. Shackleton trusted and supported others to act within limited domains, but his lack of transparency and his tendency to marginalize opposing viewpoints constrained the crew’s ability to contribute fully to high-stakes decisions.

Overall Performance Review

Taken together, the behaviours observed for the *Supporting* pillar show characteristics of the **Developed** level within the IiP framework.

In a better-performing organization, people would take the lead without being perceived as rebels. Shackleton would be more transparent, involve everyone on the ship and listen to what they have to say. Also, independent-minded people would serve as a source of insight and innovation instead of being ostracized. This shift would strengthen collective judgement and reduce the risks associated with over-centralized decision-making.

Improving Capabilities

Understanding People's Potential

According to Orde-Lees, Shackleton “[knew] one’s limitation better than one [did] oneself” (Orde-Lees, 1914). However, he did not systematically assess the crew’s capabilities or anticipate future skill requirements, which constrained the organization’s preparedness for the demands of the journey. For example, crossing Antarctica would have required competence in skiing and dog-sled travel, yet the crew received no training in either area before departure, which greatly surprised Orde-Lees, the only competent skier among the crew. Even if they had reached land, their chances of achieving rapid overland travel and succeeding would have been limited. Such omissions reveal a gap in diagnosing individual strengths and translating mission requirements into capability expectations.

These behaviours show characteristics of the **Not Met** level in how people’s potential was understood, assessed, and anticipated.

Supporting Learning and Development

Throughout the journey, Shackleton ensured that idle periods were productive and tried to make the most out of challenging conditions. As a result, the crew gradually began to function as a learning organization, experimenting and transforming experience into knowledge (Senge, 1990). They eventually learned how to drive dog sleds, which proved crucial for moving gear and boats on the ice, and developed their hunting skills, which were essential for their survival in harsh conditions.

However, these learning efforts reflected opportunistic adaptation rather than a deliberate capability-building strategy. Had the journey unfolded as planned, the crew would have reached land without the technical skills needed to travel efficiently across it, highlighting effective on-the-spot learning but not a structured, forward-looking development approach.

From a human-resource perspective, these behaviours show characteristics of the **Established** level in how learning and development were supported: the organization adapted effectively in the moment but lacked mechanisms to align development with strategic objectives or prepare people for predictable future demands.

Deploying the Right People at the Right Time

Shackleton demonstrated a strong intuitive grasp of his men’s strengths and routinely relied on personal knowledge to allocate responsibilities. When unexpected challenges arose, he reassigned roles quickly and effectively. For example, he selected McNish, the carpenter, to join the *James Caird* because of his seamanship, and relied on Hurley’s improvisational skills to repair and adapt equipment with minimal tools. These choices reflect an ability to reconfigure available capability under rapidly shifting conditions.

However, the team's overall capability profile was constrained by earlier gaps in technical expertise, which limited what deployments were possible in the first place. For instance, the absence of an experienced dog driver meant Shackleton could not draw on specialised skill when efficient over-ice travel became critical. As a result, even well-judged deployment decisions operated within a narrower option-set than the mission required.

From a human-resource perspective, these behaviours show characteristics of the **Established** level in how people were deployed: Shackleton adapted assignments effectively and responded quickly to situational demands, but the organization's ability to deploy the "right person for the right role" was restricted by missing capabilities that had not been developed or secured earlier.

Overall Performance Review

The overall performance level for this *Supporting* pillar shows characteristics of the **Developed** level within the IiP framework.

A better-performing organization would have assessed capability needs more systematically, prepared people for foreseeable demands, and built development pathways aligned with strategic objectives. It would also have established clearer mechanisms for identifying strengths and gaps early, enabling more informed and resilient deployment decisions.

Discussion

Popular accounts of Shackleton's expedition often portray him as a hero, emphasizing his courage and humanity while overlooking the mission's complete operational failure. This narrative focus can obscure the underlying organizational patterns that shaped the crew's experience. Applying the Investors in People framework offers a structured way to examine these behaviours, separating historical evidence from emotions and enabling a clearer view of how leadership practices operated under extreme uncertainty.

The analysis highlights several consistent patterns: Shackleton excelled at sustaining morale, building trust, and providing emotional stability in crisis, reinforcing the crew's resilience and cohesion under shifting conditions. At the same time, it exposed structural limitations within the organization, particularly in terms of leadership development and delegation. Decision-making remained highly centralized, and feedback from subordinates was limited. These findings suggest that while Shackleton excelled in personal influence, his approach created a reliance on his judgement and narrowed the diversity of perspectives available for adaptation.

These dynamics also illustrate how leadership choices shape a team's exposure to risk. Preparation for known challenges, such as skiing, dog handling, or navigating ice floes, was inconsistent, reducing access to specialized skills when they mattered most. In contrast, Shackleton's emphasis on character, stamina, and psychological resilience increased the team's ability to absorb shocks once the crisis began. He also positioned the team to benefit from asymmetric bets, such as the open-boat voyage to South Georgia, where the downside was limited but the potential upside was transformative. In this sense, his decisions expanded certain forms of robustness while constraining the option-set available for dealing with technical or environmental volatility.

These patterns did not deterministically dictate the expedition's fate, but they framed the crew's exposure to both advantageous and hazardous conditions, influencing what remained possible once circumstances deteriorated. In environments dominated by uncertainty, resilience and improvisation can carry a team a long way, but they never replace the broader set of options created through proactive preparation, strategic thinking, and distributed capability.

Recommendations

Shackleton was a leader who could get people out of trouble in an extraordinary way. Every person who worked with him praised his leadership, and he was probably the reason why the whole crew made it alive. However, his limited transparency and uneven anticipation of future needs narrowed the organization's preparedness in key areas and shaped the team's exposure to capability gaps as conditions evolved. He acted like an overprotective father who genuinely wanted to take care of his children but believed he always knew best, leaving them unprepared to be on their own.

The following graph summarizes the organization's maturity levels across the three IiP pillars.

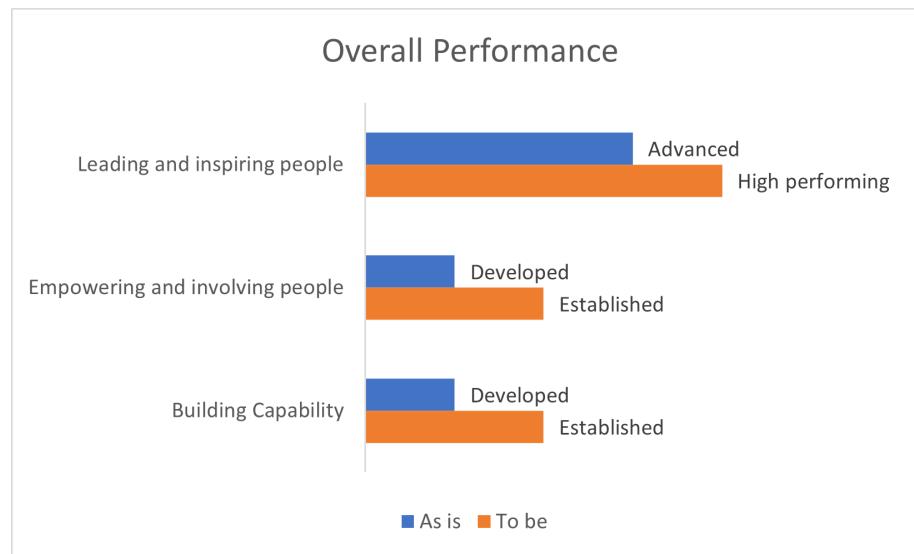


Figure 1: Organization's overall performance

This section proposes recommendations based on the observed patterns, identifying ways the organization could strengthen its people-management capability, build resilience, and improve its overall risk posture across the IiP pillars.

Leading by Example

During this expedition, the organization faced rapidly changing situations. Shackleton played a crucial role in sustaining momentum and focus by maintaining high levels of energy, visibility, and emotional steadiness throughout the process (CIPD | Change Management, 2018). Research also shows that leaders who model creative and adaptive behaviour make themselves “*available for creative emulation, which in turn produces more creativity in followers*” (Jaussi & Dionne, 2003). Maintaining these behaviours would continue to support cohesion, adaptability, and psychological stability in similarly volatile environments.

Implementing a No Blame Culture

The crew functions as a high-reliability organization (HRO), where any error “*could lead to the destruction of the organization*” (Roberts, 1990) and thus requires “*nearly error-free operations all the time*” (Weick & Roberts, 1993). In such environments, adopting a structured “no-blame” approach strengthens psychological safety, creating an “*atmosphere of trust in which people are encouraged, even rewarded, for providing essential safety-related information*” (Reason, 1997). Research shows that HROs implementing this kind of culture improve communication quality, increase knowledge sharing, and enhance preparedness for unexpected events (Provera, Montefusco, & Canato, 2010).

Encouraging Feedback

Shackleton did his best to mute the voices of people who disagreed with him. This pattern limited the organization’s ability to draw on diverse viewpoints and weakened collective judgement in high-stakes situations. (Gratton, 2011) emphasizes that open innovation is key for organizations seeking to develop effective and adaptive strategies. It requires creating space for people at every level to contribute to strategic discussions and challenge assumptions.

Encouraging dissenting views and incorporating diverse contributions enables the discovery of more innovative ways to achieve the organization’s objectives. Fostering a culture where participation is encouraged and dissent is treated as information rather than disruption supports creativity and continuous improvement (Robinson, 2001). Over time, such an environment allows the organization to operate as a learning system in which collective intelligence consistently exceeds individual contributions (Senge, 1990).

Increasing Transparency

This report highlighted that Shackleton lacked openness and transparency in sharing relevant information and his reasoning. Research shows that transparent leadership can strengthen alignment by giving people access to the rationale behind decisions (Yi et al., 2016). Sharing information, explaining decisions, and expressing genuine concerns or uncertainties fosters clearer understanding and reinforces trust.

Moreover, (Gratton, 2011) notes that participation creates greater value when employees have access to rich and accurate data, including information leaders might normally withhold. Increasing transparency would therefore support stronger engagement, better judgement, and a more informed contribution from the team.

Identifying Future Needs

Shackleton communicated extensively with his crew and developed a strong understanding of them as individuals, a practice reinforcing cohesion and allowing some adaptability. However, he did not systematically assess the organization's future capability requirements, which limited his ability to proactively prepare people for emerging demands or align development with longer-term objectives. The recruitment process also tended to favour character over role-critical expertise, creating notable capability gaps at key moments.

Tools such as an ESTEMPLE analysis can help identify future capability needs in a structured way, enabling leaders to define the skills required, recruit accordingly, and design development efforts that prepare people for both expected and volatile conditions.

Delegating

Evidence has shown that Shackleton sometimes struggled to delegate, particularly in matters involving leadership or strategic judgement. Greater empowerment and autonomy would have enabled his people to take ownership and develop the capability needed for complex, high-stakes situations. For instance, assigning full responsibility for implementing certain decisions to other crew members could have strengthened both competence and confidence across the team, broadening the set of options available when difficulties arose. Research also indicates a positive relationship between delegation and "*both idea generation and application behaviour*" (de Jong, Hartog, & Deanne, 2007), underscoring how shared responsibility strengthens adaptability and innovation.

Summary

The figure and table below summarize the key recommendations, outlining their estimated implementation effort, potential organizational impact, and the IiP indicators they support. This overview provides a clear basis for prioritizing interventions that enhance capability and resilience.



Figure 2: Recommendations ROI

| # | Recommendation | Relevant indicator |
|---|--|--------------------|
| 1 | Implementing a “no blame” culture | Supporting |
| 2 | Encouraging and valuing feedback | Supporting |
| 3 | Sharing all relevant information | Supporting |
| 4 | Sharing true feelings | Leading |
| 5 | Identifying future needs | Improving |
| 6 | Recruiting competent and relevant people | Improving |
| 7 | Delegating the implementation of decisions | Supporting |

Conclusion

This analysis of Sir Ernest Shackleton's leadership through the Investors in People framework highlights both his extraordinary strengths and organizational shortcomings. Shackleton demonstrated exceptional emotional intelligence, communication, and courage, successfully maintaining morale and cohesion under life-threatening conditions. However, his leadership was also highly centralized and reactive, with limited delegation, transparency, and strategic foresight. These gaps reduced the crew's autonomy and learning capacity, revealing the organizational limits of a model that depends on individual heroism rather than distributed capability.

Shackleton's legacy endures as a lesson in balancing inspiration with empowerment. Effective leadership requires not only guiding people through crises but also preparing them for independence, adaptation, and change. His example reminds modern leaders that resilience and empathy must be complemented by openness, collaboration, and long-term capability-building to create organizations that grow stronger under pressure, broadening the range of favourable options available when conditions shift instead of merely surviving.

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