

## Balancing

Balancing is a term used to describe the act of "re-opening" a low-level auction after two passes.

Frequently we encounter situations where an opponent has made a bid that ostensibly ends the bidding at a low level. Your partner passes, your right-hand opponent passes, but you are not content with passively passing. You hold a scattering of values; logic (and arithmetic) tells you that your partner is likely to also hold some undisclosed values. You deduce that partner must have had a hand that did not lend itself to making a direct call. Perhaps partner had high-card values, but no suit of length to overcall. Perhaps partner had values and a suit, but the values were located outside of the suit, making an overcall distasteful. Perhaps partner had values, but the strength or length happened to be in the opponent's bid suit, rendering your partner powerless to make a call.

In any event, you wish to protect your partner by re-opening the bidding and permitting your partner to come alive. Surely if you were to take some action, your partner's concealed values can be put to good use. But how should you best do this?

There are essentially three ways to balance (re-open). The first, and most obvious, is to bid a real suit of your own. This should be done only with the same kind of a hand that produces a direct overcall; namely, a suit of five cards (preferably, six or more), and a concentration of points in the suit. It should clearly disavow any interest in any other suit.

The other two ways of balancing are to bid the lowest level of notrump, or to double. Both of these actions are (primarily, but not entirely) for takeout.

Use of the double to balance is suggested whenever feasible. This is because one of the possible reasons that partner did not bid is that partner has a trump stack behind the (potential) declarer. The balancing double (which is always intended as takeout) can be converted (by passing) to a penalty double by your partner. Partner should convert this double to penalty only when holding extreme length and strength in the opponents' suit (usually six trump, or five trump with three of the top five honors).

As a matter of style, I strongly prefer to use the double when I have one (or both) unbid major suits. Usually when you balance with a double, your partner will strive to look for a major suit.

This then implies that when you balance with a notrump bid you will not usually hold an unbid four-card major. This frees your partner to pass with scattered values, even though partner may be holding a four-card major. By extension, partner should be comfortable escaping in a minor suit, because you are much more likely to be holding support there. Note that a re-opening notrump bid is not promising stoppers in the opponent's suit, because it is (still) a takeout bid. But it does permit partner to pass holding those stoppers and with no useful distribution.

How strong should you be to balance? A generally-accepted rule of thumb is that you can be about three points lighter than you would be to take the same kind of action in the direct position. So, depending on your distribution, you might be as light as about 9 HCP (4-4-4-1 shape) to balance with a double at the one-level; clearly, a little more strength is suggested when vulnerable or at higher levels. Conversely, when your partner balances, you should recognize that they may have "borrowed" a king from your hand to make their balancing bid, and you should proceed with some caution. Punishing your partner when they balance to protect you is a poor practice.

But beware of balancing when your left-hand opponent opens one of a minor suit and both your partner and your right-hand opponent pass. Unless you are particularly short in that suit (indicating your partner might have a trump stack), you might want to reconsider making an aggressive double or notrump balance (a natural suit balance is okay). This is because you should sense that the opener has opened a "convenient" minor suit and is waiting to rebid with a strong hand. In this case, your re-opening may provide an opportunity for the opponents to land in a superior contract, perhaps even doubling your partnership for penalties. Be very, very careful when considering balancing in this situation.

Having a partnership commitment to balancing is very important. It permits your partner to avoid having to make ill-advised overcalls and off-shape takeout doubles. And it enables your partnership to find lucrative penalty doubles that are otherwise evasive.