

## From *Hashomer* to the Israel Defense Forces Armed Jewish Defense in Palestine

by Me'ir Pa'il

### The Ottoman Period

From the time the modern Jewish community in Palestine (the new *yishuv*) became an entity following the first and second *aliyot* (waves of immigration) - from 1870 until the outbreak of World War I in 1914 - every Jewish town, neighborhood, *moshava* (village), farm, *moshav* and *kvutza* (cooperative and collective settlements, respectively), faced the necessity of protecting itself. At the time, protection was necessary mainly against local Arab thieves, individuals and organized gangs.

Jewish security organizations evolved in several phases. At first, Jewish settlements designated at least one person to be responsible for the security of the built-up area and, when necessary, the fields. This guard, armed with a personal weapon (a rifle and, in most cases, also a handgun) operated by day and by night, on horseback or on foot. As time passed, these guards hired Arabs for guard duty, especially at night. The method proved inefficient because soon the Arab guards began to collaborate with the thieves and bandits. As a result, in a few settlements (Zikhron Ya'akov is one example) young Jewish settlers organized small groups for guard duty on a voluntary basis, having learned the art of guarding and securing their settlements from the very few professionals.

In these circumstances, with guard duties in most settlements carried out by Arabs, and in some villages by young Jewish "irregular" volunteers - the **Bar Giora** organization was founded in 1907 in the home of Yitzhak Ben-Zvi, who later became Israel's second president, in Neve Tzedek, near Jaffa. Bar Giora established the first communes of Jewish guards at Sejera. From within these communes of workers and guards **Hashomer** was founded in 1909, defining itself as a countrywide organization that would assume responsibility for the security of as many Jewish settlements as possible. *Hashomer's* condition, before undertaking to guard and secure any settlement, was that only Jewish laborers be employed in it. Hashomer was thus able to regard these laborers as a reserve for guard duty and quickly organized its operations in a three-tiered hierarchy: a small core of founders (veterans of *Bar Giora*); a larger circle of active guards, members of *Hashomer*; and the Jewish laborers, who termed themselves a "labor legion", as reserves.

In 1913, the *Hashomer* leadership established relations with the institutions of the Zionist Organization in Europe, but this connection was disrupted in August 1914 when World War I broke out. *Hashomer* continued its security assignments in Palestine as before, taking pains to deny the Ottoman regime any pretext to liquidate it. An additional security organization came into being at this time: the Jaffa Group, comprised of young people who provided security services for Tel Aviv and the Jewish community in Jaffa. The leading personality in Hashomer throughout its existence (1909-1920), was Yisrael Shohat; the main figure in the Jaffa Group was Eliyahu Golomb.

## World War I

In Palestine under Ottoman rule, young men who lived in the moshavot around Zikhron Ya'akov formed an organization called the Gideonites. During the war, this organization served as the basis for **NILI** (the initials of *netzah yisrael lo yeshaker* - I Sam. 15:29), which engaged in active espionage for Great Britain, under the leadership of the agronomist Aaron Aaronson. On the other hand, during the war several thousand Jewish residents of Palestine were inducted into the Turkish army; a few of them were trained and appointed as officers and NCOs in the Turkish army. Examples are Moshe Sharett, Dov Hoz (who later deserted to the British army), Alexander Aaronson, and Elimelekh Zelikovich (Avner); the latter eventually became a senior commander in the *Haganah*.

Important developments in the military sector of the Zionist enterprise took place during World War I in the British army, which fought against the Turks. The first of these developments occurred in Egypt in 1915, when the **Zion Mule Corps** was formed, under the command of Lieutenant-Colonel John Henry Patterson, an Irishman, and Captain Joseph Trumpeldor. The Zion Mule Corps joined the British Expeditionary Force that landed on the Gallipoli peninsula in the Dardanelles (May 1915) and saw action there until the British were forced to evacuate their strongholds (January 1916). Almost all the soldiers of this corps were Jews who had been expelled by the Turkish authorities from Palestine because of their alien citizenship. Only after the setback in Gallipoli and relentless petitioning in British government circles in London by Jabotinsky, Rutenberg and Trumpeldor did the British War Office agree, in September 1917, to the formation of a new infantry regiment based on nearly one hundred veterans of the Mule Corps who had come to Britain, plus Jewish emigres from Russia who had settled in Britain and agreed to join a Jewish combat unit. Thus, the **38th Royal Fusiliers** came into being in southern England under the command of Lieutenant-Colonel Patterson, the former commander of the Zion Mule Corps, which had been dismantled. In February 1918, the 38th Fusiliers was transferred to Egypt, and took part in the British offensive of September 1918 under General Edmund Allenby. The regiment, then stationed in the Jordan Valley near Jericho, participated in crossing the Jordan river eastward in the direction of Salt. Vladimir (Ze'ev) Jabotinsky was a deputy commander of this regiment, with the honorary rank of lieutenant.

A second Jewish regiment, the **39th Royal Fusiliers**, was formed in Britain immediately after the 38th shipped out. The 39th Fusiliers, composed of Jewish volunteers from the United States and Canada, plus Jewish emigres from Russia, was sent to Egypt in April 1918 under the command of Lieutenant-Colonel Eliezer Margolin, who had led a battalion in the Australian expeditionary force on the French front. During its maneuvers in Egypt, this regiment began to absorb Palestinian Jewish volunteers who had enlisted in the British army after the British occupied the southern half of Palestine. The trained half of this regiment fought alongside the 38th Royal Fusiliers in September 1918.

A third Jewish regiment, the **40th Royal Fusiliers**, was created on the basis of Jewish volunteers from the United States and Canada (including David Ben-Gurion and Itzhak Ben-Zvi, who had been expelled from Palestine by the Turks, as well as Dov Joseph and Nehemia Rabin). This regiment, commanded by Lieutenant-Colonel Samuel, reached Egypt in August 1918 and began to take on Jewish volunteers who had come over from Palestine (including Eliyahu Golomb, Dov Hoz, Berl Katznelson,

and several members of *Hashomer*). The 40th Royal Fusiliers was transferred from Egypt to Palestine, but too late to see action.

Almost all the members of the three Jewish regiments were discharged immediately after the end of World War I in November 1918. Those from Britain and Palestine returned to their respective countries and some of those from North America settled in Palestine to realize their Zionist convictions. Representatives of the Zionist Executive in Britain and Palestine persuaded the British authorities to establish a Jewish volunteer regiment (commanded by Lieutenant-Colonel Eliezer Margolin), as part of the armed forces garrisoned in Palestine. This regiment, known as the **First Judeans**, was organized in 1919 at Sarafand (now Tsrifin), but the British did not allow it to take part in either the incidents in Tel Hai and Jerusalem in 1920, nor during the Arab disturbances in May 1921. Thereafter, when violence broke out on the border between Jaffa and Tel Aviv, Margolin sent part of the regiment into action on his own initiative. In response, the British disbanded it.

### **The First Twenty Years of British Rule in Palestine (1919-1939)**

The disbandment of the First Judeans vindicated those Zionist leaders who argued against reliance on British patronage for the development of a military force. In 1920 the *Haganah* was formed as a "grassroots" military organization, admittedly illegal from the British point of view but regarded by its founders, who were also the founders of the *Histadrut* (the General Federation of Jewish Labor), as a full-fledged national armed force, subordinate to an elected political leadership and authorized to use its military potential in defense of the *yishuv's* interests. For its first ten years, the *Haganah* was subordinated to the elected public institutions of the *Histadrut*, since the elected political institutions of the Zionist Organization and of the *yishuv* were not yet prepared to accept responsibility for this illegal military entity.

In the aftermath of the 1929 disturbances, and after two years of discussions among leaders of Zionist parties across the political spectrum, the *Haganah* was transferred to the joint authority of the Jewish Agency Executive and the *Va'ad Leumi* (National Council). In 1931, the *Haganah* was placed under the authority of a parity committee - an evenly-split political High Command composed of six political figures - three representing the "Left" (among them Eliyahu Golomb and Dov Hoz) and three representing the "Right" (among them Sa'adya Shoshani and Yissaschar Sidkov). Thus the *Haganah* became a national military organization, subordinate to the nation's elected leadership. Although the British, as well as the Arabs, considered the *Haganah* illegal, the *yishuv* regarded it as a legitimate popular military organization. Every rural settlement - *moshava*, *moshav*, *kibbutz* - and every Jewish town or neighborhood was affiliated with the *Haganah*, and the identity of the *Haganah* district commander was known to most inhabitants.

In 1931 a group of *Haganah* members seceded from the organization, refusing to accept the authority of the parity committee - High Command. Shortly afterwards, from 1932 on, the breakaway group, headed by Avraham Tehomi, became known as the National Military Organization (*Irgun tzeva'i le'umi*) or its acronym, *Etzel*. This organization received the full backing of Ze'ev Jabotinsky's Revisionist Party and partial support from factions of the right-wing General Zionists and the *Mizrachi*.

During the disturbances of 1936-1939 - called by the Arabs the "Arab uprising" - strategic interests persuaded the British governments in Jerusalem and London to allow a certain degree of military collaboration between the British army and police and the *Haganah*. This cooperation gave the *Haganah* a measure of legality for three years, manifested in the **Supernumery Police** venture that lasted until 1948 and in the fraternity of arms with Captain Orde Charles Wingate.

In 1938, the Jewish Agency Executive decided to appoint a nationwide leader for the *Haganah*; a non-partisan personality who would be chairman of the High Command. The first to fill this position was Yohanan Ratner. Some eighteen months later, in September 1939, after thorough discussion by the High Command and the political bodies to which it was subordinate - the Jewish Agency Executive and the National Council - it was decided to appoint a professional **Military General Staff** (M.G.S.) which would be in command of all military components and operations of the various *Haganah* bodies. The M.G.S. functioned under the authority of the High Command; the first Chief of the General Staff was Ya'akov Dori (Dostrovsky).

Etzel experienced a crisis during the first year of the Arab "disturbances." In April 1937, half of its members (about 1500), led by Avraham Tehomi himself, abandoned it and returned to the *Haganah*. The other half continued in *Etzel*, which now answered to the political authority of the Revisionist Zionist Organization under Ze'ev Jabotinsky. *Etzel* rejected the *Haganah's* moderate policy against the Arabs, the so-called "restraint" (*havlaga*) doctrine of the elected Zionist leadership, and adopted a policy of intimidation and terror.

The Arab rebellion was quelled in the 1938-39 period by British forces in cooperation with the *Haganah*, which mobilized more than 20,000 Jewish supernumery police plus the **field troops** under Yitzhak Sadeh and the **special night squads** of Captain Orde Wingate.

## **World War II (1939-1945)**

After about two decades of activity, clear indications of extensive professional institutionalization became evident. "Regional Defense" had come into being, as had Field Troops that operated for about two years (1937-1939). By this time, the *Haganah* had created a Field Corps, a Medical Service, a Signals Corps, an Intelligence service, **Aliya Bet** (which handled illegal immigration), an arms industry and services for the procurement and storage of weapons. The country was divided into operational districts and a professional military journal called *Ma'arakhot* (campaigns) made its debut. In 1941, the "Youth regiments" (**Gadna**) and the "Strike Force" (**Palmach**) were formed. In the same year, the tenets of the *Haganah*, emphasizing the national and Zionist character of the *Haganah*, as the sole military force of the Zionist enterprise and of the Jewish state-in-the-making, were formulated:

- The *Haganah* is the military force of the Jewish people which strives for political independence in the Land of Israel.
- The *Haganah* answers to the authority of the World Zionist Organization in conjunction with the organized Jewish community in the Land, is at their service and obeys their orders.

- The functions of the *Haganah* are: 1) to defend the Jewish community in Palestine against attack on its people, property, and dignity; 2) to defend the Zionist enterprise and the political rights of the Jewish people in the Land of Israel; and 3) to defend the Land of Israel against enemy action from outside its borders, commensurate with its capabilities and political circumstances.
- The *Haganah* serves the entire nation, the entire yishuv, and the entire Zionist movement. Its flag is the national flag - blue and white. Its anthem is the national anthem, *Hatikva*. Any Jewish man or woman willing and able to undertake the tasks of national defense may join the *Haganah*.
- The *Haganah* is absolved from the laws of the non-Jewish government. Its existence, its weapons and its operations are subject to painstaking secrecy. Those who breach this principle do so at the risk of their lives.
- The *Haganah* educates its members to allegiance to the Jewish people and Eretz Israel, love of freedom and Jewish revival, courage, endurance in the face of suffering and adversity, willingness to sacrifice, respect for human life, honesty of character, simplicity and respect for human and Jewish values.

When World War II broke out and Britain took on a key role in fighting against Nazi Germany, the Zionist leadership realized that direct or indirect military action against the British was out of the question, even though the British White Paper policy (May 1939) severely restricted Jewish immigration and land-acquisition rights. David Ben-Gurion, chairman of the Zionist Executive, ruled that the Zionist movement and the *yishuv* would cooperate with Britain against the Nazis on the military level but would continue to resist the White Paper in matters of immigration and settlement.

The *Etzel*, in contrast, was engulfed in controversy. The Revisionist leadership ruled that, notwithstanding the White Paper, Jews should cooperate with Britain against the Nazis on the military level. A smaller group, led by Abraham (Yair) Stern, deemed Britain to be the bitter enemy of Zionism, which should be fought militarily by means of guerrilla action and terrorism. After Jabotinsky died in 1940, this group seceded from the Etzel and began to operate separately under the name "*Etzel in Israel*" (popularly known as the **Stern group**). After the murder of Stern by the British in February 1942, the new leaders of the group (Natan Yellin-Mor, Yitzhak Shamir, and Yisrael Eldad) reorganized their underground group under the name *Lohamei Herut Yisrael* (Jewish Freedom Fighters) and its acronym, **Lehi**.

Of great importance to the development of armed Jewish defense in Palestine were the more than 30,000 Palestinian Jews who enlisted in the British army in the course of World War II. In the last stages of the war, the **Jewish Brigade Group** was established and saw action against the Nazis in northern Italy. The Palestinian Jews in the British army and air force learned a broad range of military subjects - combat, administration, technology and logistics of a modern army - and transferred this knowledge to the Jewish defense forces in Palestine. This was to be of great use to the Israel Defence Forces, offspring of the *Haganah*, to be established during the War of Independence.

### **The Anti-British Struggle (1945-1948)**

After the end of WWII, between October 1945 and the beginning of the War of Independence in December 1947, the *Haganah* was the largest and most important Jewish military force that operated against the British. Its acting chief of staff, Yitzhak Sadeh, was the most senior and most authoritative personality in the "Jewish resistance movement." The *Haganah* carried out anti-British military operations - liberation of interned immigrants from the Atlit camp; the bombing of the country's railroad network ("Night of the Trains"); sabotage raids on radar installations and bases of the British police mobile force; sabotage of British vessels that engaged in deporting clandestine immigrants and destruction of all road and railroad bridges on the borders ("Night of the Bridges"). It was also the *Haganah*, under Shaul Avigur (Meirov), that operated the mass clandestine, illegal immigration from Europe and North Africa in 1944-1948, on the escape (*Beraha*) trails and maritime routes, as well as overland from Middle Eastern countries. Furthermore, the *Haganah* provided military protection for the country-wide Jewish settlement enterprise, which took place in defiance of the constraints imposed by the British land laws. One such operation was the establishment of eleven settlements in the Negev on the night after Yom Kippur 1946, under the command of the deputy chief of staff of the *Haganah*, Yosef Avidar (Rokhel).

The *Etzel* and *Lehi* were, of course, also active in the resistance movement, their many operations focusing mainly on individual terrorism and guerrilla warfare against the British. Examples are the bombing of the British government and military headquarters at the King David Hotel in Jerusalem, raids on British air force bases at Qastina and near Kfar Syrkin, liberation of Jewish prisoners from the prison in Acre, and sabotage of the railroad repair workshop near Haifa.

### **he War Of Independence (1948-49)**

In the daily Order of the Establishment of the **Israel Defence Forces**, issued in the midst of the invasion by Arab armies on May 31, 1948, Prime Minister David Ben-Gurion made the following statement: "Vast is the debt that the *yishuv* and the Jewish people owe the *Haganah* during all the phases of the founding [of the state], in Petah Tikva, Rishon Lezion, Gedera, Rosh Pina, Zikhron Ya'akov and Metulla, via *Hashomer* of the Second *Aliya* vanguard, the Jewish Legion in the First World War [the three fusilier regiments, the 38th, the 39th and the 40th], the defenders of Tel Hai and the steady growth of a national defense organization in the period between the two world wars, the formation of the supernumerary police corps during the disturbances of 1936-1939, the founding of the *Palmach* and the Field Corps, the mass volunteering in the Second World War and the formation of the first Jewish Brigade and up to the mighty struggle by the *Haganah* in the first half of the war against us, from 30 November 1947 to 31 May 1948. Were it not for the experience, the planning, the operational and command ability, the loyalty and spirit of valor of the *Haganah*, the *yishuv* could not have withstood the terrible, bloody ordeal that has come upon us these past six months and we would not have attained the State of Israel. In the annals of the Jewish people, the chapter on the *Haganah* will glow with a grandeur and pride that will never tarnish."

Thus, it was the *Haganah* that was responsible for defense, security, retaliation, and counterattack against the Arab-Palestinian enemy, the foreign Arab volunteers and

the Arab regular armies which invaded Palestine after 30 November 1947, the beginning of the War of Independence. It accomplished this mission until June 1, 1948, when the Israel Defence Forces - the IDF - officially came into being, several days after the provisional government passed a resolution to this effect (May 26). The IDF was not an *ex nihilo* product but an evolutionary and natural development of the *Haganah*, having inherited from it the General Staff and its Chief, the combat units, the operational and logistical formations, the air and naval arms, procurement and manufacture of arms, intelligence services and mobilization systems. It was the IDF, the offspring of the *Haganah*, that brought to an end the military campaign that the *Haganah* had begun in the War of Independence.

Colonel (res.) Meir Pa'il, Ph.D. is the academic director of the Galili Center for Defense-"*Haganah*" Studies.