



The Rise, Fall and Rebirth of Territorial Defense

RESEARCH ARTICLE

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ABSTRACT

The choice and organization of Israel's defensive method, decided in the context of border expansion, the distribution of its population, the "people's army" model, and the modus operandi of its various antagonists, are deeply influenced by borders. This article reviews certain aspects of perception and doctrine related to territorial defense as formulated in the early days of the Israeli state and the extent to which they are applied in practice today. It also describes the decline of territorial defense forces between the Sinai War of 1956 and the end of the 2010s, arising from an emphasis on a more offensive doctrine relying on mechanized and armored forces and a strengthened air force. Finally, it describes the recent revitalization of interest in territorial defense methods and means in light of current and future challenges facing Israel and the IDF; in this way it underlines that, today, the offensive doctrine is not the only solution, as it was in the times of the Sinai War and, especially, following the Six Days War of 1967. On this basis, the article indicates how principles of territorial defense as formulated in the early 1950s, employed alongside lessons learned by the IDF and other armies in the course of recent decades, can create a model of defense applicable to Israel's border areas. Such a model would contend with the threat of enemy surprise attacks in all alert levels, and particularly states of emergency and war, freeing maneuvering forces to perform their defensive or offensive missions.¹

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Territorial defense was a crucial pillar of Israeli national security doctrine at the state's founding in the War of Independence (1948–1949) and in its first years of sovereignty (Beer, 1966; Freilich, 2018). Israel strengthened its offensive doctrine in subsequent years. Due to its geographical location, the doctrine's goal was to move combat from Israeli territory into that of its adversaries. In the mid-1950s, Israel had an offensive army that successfully fought the Egyptian army in Sinai (1956); a decade later, the IDF won the Six-Day War (1967) against the armies of Egypt, Jordan, and Syria. During this period, the territorial defense force lost its place in the national security doctrine and in the IDF. It has not regained that place today (Druck, 2017).

This article will demonstrate that Israel's territorial defense force lost its role with the development of an offensive doctrine in the latter part of the War of Independence (1948–1949). With the success of the subsequent wars and the increase of IDF activity on adversaries' territory, the idea of territorial defense and territorial defense forces was put aside, principally to preserve scarce defense resources. I will first describe territorial defense in the War of Independence and the Sinai War, and then present the organization of territorial defense after the Sinai War. Toward the end of the article, I will argue that a renewed discussion of territorial defense is justified by new national security challenges in Israel and changes in the way the IDF operates. The model of free maneuvering IDF forces, acting both offensively and defensively, suited a threat landscape of enemy surprise attacks, states of emergency, and wars; during the last decade, however, Hezbollah in Lebanon and Hamas in the Gaza Strip have built an offensive capability based on infantry units. The objectives of these forces are incursions into Israeli territory to conquer army posts and civilian settlements and to control key terrain and junctions near the border. The goal is to strike and delay Israeli forces on their way to the border, and into Lebanon and the Gaza Strip respectively. Thus, today, an Israeli territorial defense force could be a helpful addition to the IDF's routine forces on its border territory, contributing until the IDF has mobilized its regular and reserve forces.

With the Russian invasion of Ukraine in 2022, many smaller European states such as Denmark currently seem to have refocused defense priorities, downscaling investment in expeditionary missions while revamping territorial defense investments. Thus, thoroughly understanding the doctrine of territorial defense and the use of civilians as part of a country's defense efforts is more pertinent than it has been in Europe since the Cold War (Maryn, 2022). The Finnish experience of the Winter War of 1939–1940 and its impact on the continuing territorial defense thinking of Finland are well recorded (Irincheev, 2009; Moriarty, 2022; Reese, 2008; Tuunainen, 2016). To supplement such knowledge with that of Israel's territorial defense during its early years offers additional, much-needed, perspective on how to utilize civilians as a home guard, among other supporting military functions, freeing up maneuvering forces from fixed defense localities to offensive operations. The case of Israel exemplifies, for example, how a successful use of territorial defense forced the attacking enemy's army to fight on each road junction and settlement (Druck, 2017; Mackenzie, 1996; Maryn, 2022; Wintringham, 1943).

The article builds on an extensive study of documents regarding territorial defense in Israel from various sources and organizations, mainly the IDF, the Ministry of Defense, the Department of Settlement, and settlement movements such as kibbutz and moshav (similar to kibbutz but composed of cooperative agricultural communities of individual farms). Other research is drawn from studies of the British Home Guard and from primary sources such as original handbooks of the Home Guard units and the British army. The research is conducted according to historical method, attempting to describe the time-events and the processes of territorial defense in relation to past and recent challenges.

THE RISE OF TERRITORIAL DEFENSE: FROM THE WAR OF INDEPENDENCE TO THE SINAI WAR – THE PRESENCE OF AN EXISTENTIAL THREAT

Jewish settlement in Israel has always been linked with security (Druck, 2017). In broad strokes, one might say that at first security served the needs of settlement, protecting settlements from

1 While this paper does not discuss the challenges of terror or infiltration of criminal and terrorist elements, it would be wise to follow the established method of integrating responses to these challenges in existing units.

attacks by Arab militias; later, settlement served security needs – occupying territory conquered in the War of Independence, setting the country's borders and establishing a territorial defense array prepared to hold a surprise attack by Arab armies.

The main pillar of the Israeli territorial defense concept is the territorial military force able to defend against invasion by foreign militaries, including local offensives, without conducting offensive incursions into enemy territory (Druck, 2017; Fried, 2020; Mendershausen, 1980). This concept, originating in the 1929 Riots and the Great Revolt of 1936–1939, was most likely influenced by the example of the British Home Guard of the early 1940s (Mackenzie, 1996). The British Home Guard, too, began as an initiative by local communities, organizing for defense, fortification, and training, using weapons, techniques, and tactics suitable for protection against a German invasion (Operation Sea Lion) during World War II. As the Home Guard grew, the initiative was adopted by the British government, understanding the need to combine a static defense force based in local settlements with mobile military units able to counterattack and decide the battle against enemy German forces should they invade. The mainstay of the Home Guard's personnel were men, either in "reserved occupations" or outside recruitment age, equipped with personal firearms, machine guns, and even support weapons, using doctrine and fighting techniques almost identical to those of the standing army (though published and printed unofficially).

In the early 1940s, contributors to *Ma'arachot* and *Ashmorot*, two security journals published by the Jewish population in Mandatory Palestine, discussed the British Home Guard, detailing its structure, techniques and drills, and the need to teach them to Jewish defense forces in Israel (Beer, 1941; 1942; Paul, 1942; Ruan-Robinson, 1941). These were required initially during the planning of Massada on Carmel, the plan for defense against an expected German invasion of Mandatory Palestine, and later for the defense forces, ahead of an expected conflict with Palestinian militia and regular armies from neighboring Arab countries. Both the operational concept of the Jewish territorial defense and the organization of its lower echelon seem to bear significant resemblance to those of the British Home Guard. The Israeli model of territorial defense drew heavily on knowledge developed in other places, learned and adapted to the specific conditions of the time. This applies particularly to the organization of higher headquarters (the Home Guard Battalion and the Home Guard District).

During the War of Independence, a number of settlements took active roles in the fighting. Some, alongside other forces, physically blocked enemy forces, preventing or delaying them from advancing through or near them. The Syrian army to the north was halted at the gates of Kibbutz Degania; the Egyptian army and semi-regular forces accompanying it were delayed and attrited in fierce battles at Nirim, Nitzanim, Be'erot Yitzhak, Yad Mordechi, Negba, and others. Enemy forces remained exposed to raids and attacks launched from these settlements, which served as fast bases for maneuvering forces, even after the Egyptian forces advanced beyond them (whether they were taken or not). Egyptian soldiers stated:

We advanced north after quickly taking Gaza, but failed to notice the kibbutzim, which remained a thorn in our side. ... [S]imple military reason dictated that we first got rid of the Negev kibbutzim, which were weak and not entirely prepared, in order to prevent the possibility of them serving as a base for launching offensive operations against our forces. (General Staff Branch, 1950)

Settlements, then, were able to delay, channel, and attrite Egyptian forces, as required of the territorial defense array, and as defined in its objectives and roles after the war.

The settlements' fighting was part of a much wider campaign, combining the maneuvering of forces, various IDF brigades and the newly established Israeli Air Force. In the state's first years, the debate over the importance of settlements as part of the IDF's defensive array was conducted on various levels and with a wide scope. Ben-Gurion, for example, emphasized their place in national security:

We all know the role served by rural border settlements in the War of Independence, both when we faced few gangs of Arabs, both Palestinian and from neighboring countries, and when we fought regular armies from Arab countries. (Ben-Gurion, 1987, p. 188)

Later, Meir Pa'il presented a different position, arguing: "With all due respect to the kibbutzim, moshavim and the working settlement movement in general, it should be said that Negba did not hold its ground on its own" (Pa'il, 1993, pp. 80-88). The lesson learned from territorial defense in the War of Independence was, then, that there was a need for a combined action by the maneuvering forces and those of the territorial defense. Both were needed to defend against surprise attacks by the enemy, and as part of the territorial defense array enabling the maneuvering of brigades to be mobilized for offensive objectives. They did not need to be part of the defense forces defending the settlements within (to the extent that the territorial defense array is capable and ready to fulfill its roles, that is).

During the War of Independence, great emphasis was put on the capture of territory and the holding of the settlements inside it, even under conditions of fighting and siege (see Figure 1). Preventing the settlements from falling and returning them to Israeli control if they fell was not a purely military objective; it was question of morale, too. In this regard, Ben-Gurion stated: "Settlements were not only taken over, some were abandoned, unnecessarily abandoned, abandoned against orders. ... [I]t should not have happened that three settlements were abandoned against orders – two in the Jordan valley, Masada and Sha'ar Hagolan, one in the Negev – Yad Mordechi." (Rosenthal, 1966, p. 34). While orders were given to evacuate settlements according to the contingencies of combat (Har-Tov being one example), these orders were given with the intent of returning when the conditions were right. During the War of Independence, then, settlements were perceived as a "flag in the ground" which should not be removed: they symbolized the possession of territory as the state was established.



Figure 1 1948 Israeli War of Independence – May 15–June 10.

Settlement was an inseparable part of security:

The second aspect of security is settlement. This year, our army recovered large areas of the Negev, the Galilee and the Jerusalem Corridor. Most of these territories are empty and desolate. We would not hold them with military force alone. We must

establish a chain of frontier settlements along the border with Lebanon, Syria and the Triangle,² a fine mesh of settlements. (Rosenthal, 1966, p. 86)

As mentioned, the settlements were perceived as part of an array of outposts and positions required to serve as a capable defensive array, prepared to repel any enemy offensive, alongside its strategic role of actively holding, through settlement, Israeli territory as defined by the borders at the end of the war.³ Even during the War of Independence,

settlements functioned more or less as defended localities and fortified tactical positions. They were not meant to defend themselves without operating mobile forces in the area for the purposes of reinforcements, for the purposes of bolstering, for the purposes of capturing additional outposts and perimeters, or for the purposes of counter offensives. In this sense, the settlements were very similar to regular military defended localities and fortified battle positions. (Pa'il, 1993, p. 85)

Indeed, this was another lesson learned from the war. And it describes the way military and political leaders perceived the territorial defense array in the state's early years. As far as official records show, it did not change much until the Sinai War, and perhaps even afterwards (IDF General Staff, 1961, pp. 1–36). The March 1949 document "Guidelines for The Principles of the Territorial Defense System for Area (Company) Commanders Course" (IDF Operations Directorate, 1949) prepared by Israel Bar, head of the planning department in the IDF's Operations Directorate, serves as a basis for understanding the array and the way it was integrated into the security concept. It states that the territorial defense system, based on a network of settlements ready for combat, in terms of man power, equipment, fortification, and training is an inseparable part of the military, in both offense and defense. Yet it seems that political and military leadership considered this an outdated concept, inappropriate for new wars. The leadership understood that regular organized armies will conduct offensive operations making use of armored, mechanized, and infantry forces supported by artillery and air force, and will easily be able to overcome a territorial defense array relying on weak units with lower grade inventory and weapons, less sturdy fortifications, and less well-trained and well-drilled commanders and combatants.

Nevertheless, some continued to argue the relevance of territorial defense, largely out of the political, ideological, and economical motives of the settlement movements. For example, Shimon Avidan, who commanded the Giv'ati brigade during the War of Independence, argued that the purpose and roles of the territorial defense array, in routine security and in war, are:

To secure the frontier in times of peace, to independently prevent infiltration, fighting an active war in case the enemy combines regular and guerilla warfare in the first phase (this will be determined in training and arming the territorial defense), blocking sudden attacks by making the settlement into a base of fire, and capturing outposts ... serve as a base from which the IDF can launch close operations and serve as a jumping board; in case of deep enemy penetration – strike at its back, block. Serve as a base for those units tasked with acting in the depth. (Avidan, 1950)

Avidan also emphasized the array's role in routine security: combating infiltration, a tactic with which territorial defense struggled. In fact, while both territorial defense headquarters in the regional command and the headquarters of peacetime territorial defense battalions performed routine security tasks, they did not use the same equipment; often they did not employ the same manpower required for war. The needs of defense against infiltration were different from those required for defense against armies – means such as mining, firing positions, and connecting trenches, for example, were required for war but not for peacetime.

The changes in the objectives and roles of the territorial defense array in the first half of the 1950s arose from General Staff discussion in the IDF's force-design efforts and its preparations for a renewed war. The changes were also the result of ongoing evaluations which both continued to reinforce defensive capabilities and to strengthen offensive capabilities in order

² The area between the Palestinian cities of Jenin, Nablus and Tulkarem, then under the control of Jordan.

³ For the sake of simplicity, this article uses the word "border" to refer to the various kinds of security lines, regardless of legal definitions of disengagement lines, armistice lines, etc.

to shift fighting to enemy territory. The IDF's force design emphasized offensive capabilities – armor, air force, and a certain enhancement of infantry. Changes were made in light of the connection between the regional defense array as it was designed for war and the needs of routine security, as well as the lessons learned from maneuvers and exercises.

These changes are apparent in contemporary documents, both those related to staff work on the force design of the territorial defense array and those related to the force design of the entire military. For example, an instruction document for territorial defense published in April 1951 (IDF General Staff/Operations, 1951) placed an emphasis on initiative and offensiveness by establishing reserve forces, planning counter-strikes, engaging in patrols and reconnaissance, and the role of providing intelligence in the area. In an August 1953 review of the territorial defense array delivered to David Ben-Gurion, then Minister of Defense, the description of the role was unchanged from previous documents:

Will serve as a primary holding force; will serve as a force covering mobilization of reserves alongside other IDF forces; will serve as a steadfast base for mobile forces employed in offensive missions; will serve as a source of field intelligence. (IDF General Staff/Operations, 1953)

A September 1955 instruction document for territorial defense planning provided a number of new emphases, mostly related to the defense objective – a settlement. One such emphasis was the principle of not quitting the settlement, therefore emphasizing also the territory's ability to defend itself, "which has national morale significance, as past experience already proves" (IDF General Staff/Operations, 1955).⁴ Relinquishing territories which were tactically indefensible in settlements where security was not a leading consideration in planning, positioning and deployment ("towel" and "sausage" forms of settlements and moshavim in general), was not compatible with the settlement-security concept. An order was given to fortify structures where Israeli forces were expected to form up for defense inside the settlement. Instructions were given to plan the logistics based on the existing resources in the settlement and storing supplies so they would not be damaged in fighting, and an emphasis was put on planning agricultural production (among other forms) at times of emergency (General Staff/Operations, 1955). It seems that despite the diminished role territorial defense served in everything related to military staff work and integration with the civil economy in the eyes of military and political leadership, no change took place. Yet the many gaps in the array (fighting equipment, skilled and trained man power, exercises and so on) resulted from allocating resources to offensive arrays at the expense of territorial defense.

ORGANIZATION OF TERRITORIAL DEFENSE AFTER THE WAR OF INDEPENDENCE

When examining the structure and organization of the territorial defense array, we must assume that they rely on and are defined by a concept and doctrine. The structure and general organization of the territorial defense array had not significantly changed between the founding of the IDF in 1948 and the 1960s (IDF General Staff, 1961, pp. 1–36). It was, however, modified in various ways, mostly in the staff complements of units and headquarters, according to manpower and the availability of means. In-depth discussions took place over the course of more than a decade examining the significance of and need for the territorial defense region as an echelon between that of the territorial defense battalion and area, and the capacity to sustain both a brigade and a territorial defense district at the same headquarters in peacetime, splitting it into two separate headquarters at times of emergency, as will be discussed below.

"Guidelines for The Principles of the Territorial Defense System for Area (Company) Commanders Course" (Operations Directorate/Staff Role Department, 1949), mentioned above, detailed the principals for the structure, organization and doctrine of territorial defense. It begins:

1. The territorial defense system is an inseparable part of the armed forces. Its actions during battle will be coordinated and integrated with the regular army's offensive and defensive operations.

⁴ The subject of abandoning settlements was a central issue burned into the national consciousness as a lesson of the war. Arguments regarding the circumstances in which Nitzanim was abandoned in the War of Independence, for example, continue to this day.

2. The territorial defense system will include all rural settlements, regardless of location, and they will act as the defensive network in depth throughout the state.
3. Rural settlements will be divided into three types, a, b, c, according to geographic location, overall military importance, proximity to regular forces' permanent fortifications and consideration of the general operative plans.
4. A complement of man power, armament, fortification, radio and equipment will be set for each type. (IDF General Staff/Operations, 1955).

The paragraph discussing the structure and organization of the territorial defense array reads:

The highest organizational echelon of the territorial defense system is yet to be determined. For now, the listed rungs can be used:

1. A number of areas are grouped into a territorial defense region;
2. A number of regions under a territorial defense battalion;
3. A number of battalions under a district;
4. It should be taken into account that in those cases were the operation of the territorial defense system would be combined with the operation of regular forces, the latter would command all operating forces. (IDF General Staff/Operations, 1955)

It is necessary, then, to begin by presenting the principals on which the territorial defense array was organized in the first decade of Israel's existence.

The IDF's force structure Order no. 1, which deals mainly with the infantry corps, details the basic organization of the garrison, i.e., the organization of territorial defense and its mutual relationship with the maneuvering forces. The order states that: Each front has a number of territorial defense districts subordinate to it for the purposes of fulfilling roles related to the territorial defense system and fulfilling various logistic and organizational roles." (IDF General Staff, 1949a). The relationships with the maneuvering forces are such that the territorial defense district or units in it can be subordinated to the commander of a maneuvering regiment, and vice versa, infantry and other maneuvering units can be subordinated to a territorial defense district commander "according to operative needs." (IDF General Staff, 1949a)

In September 1949, the staff department in the IDF's Operations Directorate published a document regulating the structure and defense of the territorial defense array and detailing the roles of each of its components (Operations Directorate/Staff Role Department, 1949; see also Figure 2):

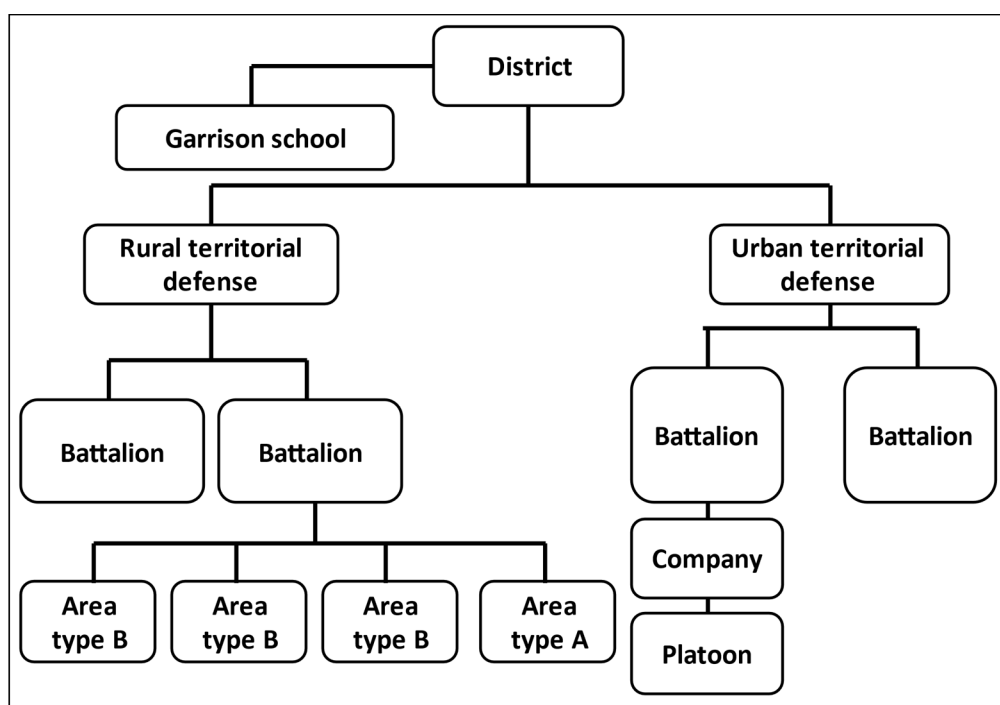


Figure 2 Structure of territorial defense – September 1949 (based on Operations Directorate/Staff Role Department 1949).

1. The garrison is subordinate to the territorial defense district headquarters and is the territorial defense's fighting force. It is organized into battalions in the urban territorial defense districts and into territorial defense battalions and areas in the rural zones.
2. In urban territorial defense districts, the fundamental unit is the garrison battalion, organized by neighborhoods.
3. In rural zones, the territorial defense area is the fundamental unit of territorial defense. It includes one or more (usually one) settlements, manned by at most a company and auxiliary units. Rural zones are divided to type a (no more than 10 km from the border and ones in key areas) and type b (settlements deeper in Israeli territory).
4. The territorial defense battalion comprises a number of areas "which are given a common tactical mission... the defended territorial defense battalion is based on the combined fire, fortification and mining plans of the subordinate territorial defense areas, and activating local reserves from the local population in settlements under the territorial defense battalion's area of responsibility. (Operations Directorate/Staff Role Department, 1949).

The document emphasized that areas are intended to mutually assist each other and to serve as a defended locality or a fortified battle position as defined in IDF doctrine (IDF General Staff, 1964, p. 20). Later, in the early 1950s, the general staff saw the territorial defense battalion as more of a logistic, rather than operative, unit, while the territorial defense area and even region were perceived as an operative echelon (IDF General Staff, 1952). Still, between 1954 and 1956 exercises were conducted with territorial defense battalions. These battalions seemed to be taking on the status of an operative echelon, coordinating its defense operations with the maneuvering forces in the operation area: principally counter attacks and the defense of non-settlement areas..

The territorial defense district would include a number of territorial defense battalions, "no less than two and no more than four" (Operations Directorate/Staff Role Department, 1949). It should be emphasized that with regard to the territorial defense district, this was not meant as an operative organization; its function was purely logistical.

As mentioned, the structure of the territorial defense array displays a number of changes between the War of Independence and the Sinai War, mainly in two areas: centralization/decentralization and strengthening command and control during war. As long as the territorial defense district existed, it was responsible for

organizing and planning the territorial defense system in rural and urban areas, including participation in planning new settlement in the district; ... operating the garrison in times of war; ... defending the borders from infiltration ... to the extent that garrison units are so tasked; ... training, exercising and maneuvering garrison personnel; ... armament and equipment; ... planning fortification ... overseeing their construction and maintenance; ... overseeing existing fortifications and maintaining them in effective condition; ... planning and organizing anti-aircraft defense; ... security of military facilities in the territorial defense district's territory; ... territorial logistics. (IDF General Staff, 1949b)

The desire to strengthen the regional command, concentrating in it both authority and responsibility for preparing the area under its responsibility for war, lead the general staff to accept the recommendations made by the head of the Operations Directorate in January 1953 (Operations Directorate, 1952; Oren, 2004, pp. 429–460). Territorial defense district headquarters were eliminated and a territorial defense headquarters was established in the regional command (see Figures 3 and 4). The commander of the "regional defense headquarters" became both a regional command staff officer charged with issues pertaining to territorial defense and the commander of the territorial defense battalions in the regional command's territory (Head of Operations Directorate/Staff Role Department, 1953). Concentrating authority in the hands of the regional command, mainly its incorporation in settlement planning, seems to have strengthened settlement security; discussions between the settlement department of the general staff and settling institutions were important in this regard. In March 1953, the faculty of the IDF's Command and Staff College, mandated to discuss the issue, decreed:

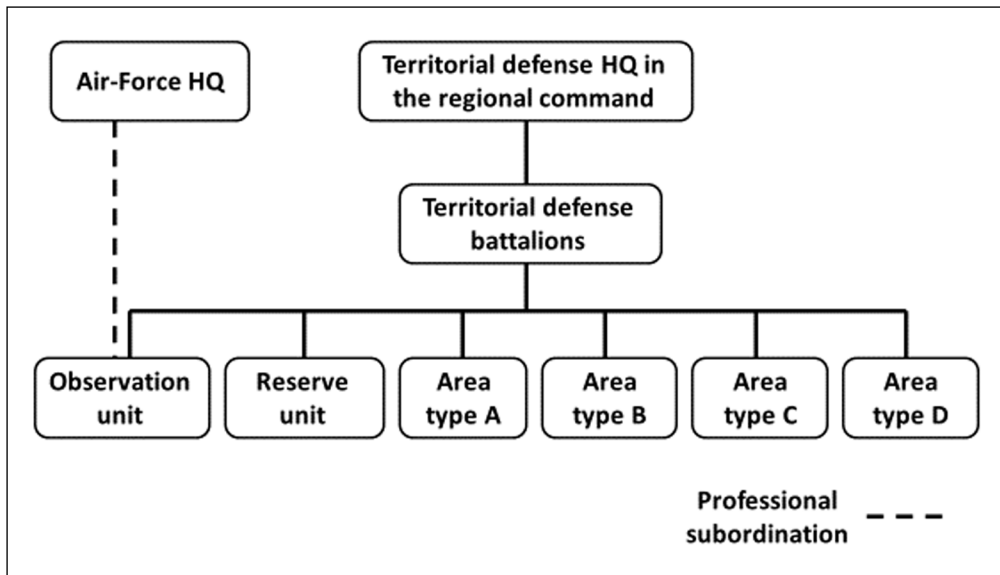


Figure 3 Peacetime structure of the territorial defense array (based on Office of IDF Deputy Chief of General Staff, 1956a).

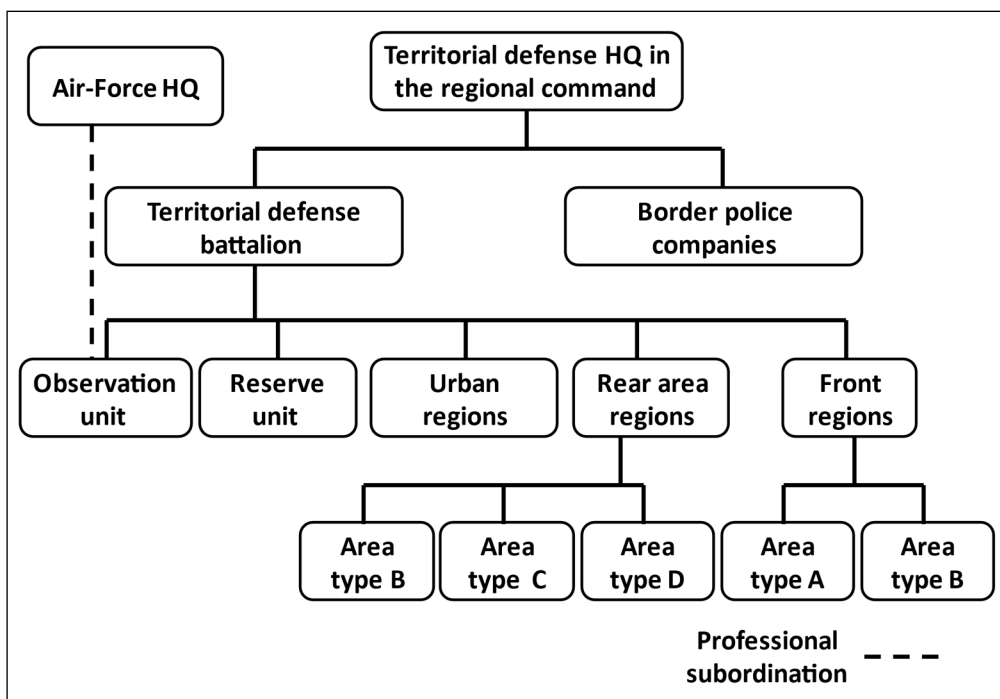


Figure 4 Wartime structure of the territorial defense array (based on Office of IDF Deputy Chief of General Staff, 1956a).

It is tenable that the territorial defense headquarters, being familiar with the terrain and its problems due to its peacetime duties, and which continue to be familiar with it during the defensive phase of the war, would be the most suitable to fill the role of rear area headquarters. (Faculty of the Command and Staff College, 1953).

Indeed, the territorial defense headquarters was viewed by the regional command as capable of accepting responsibility for an area or a mission in order to take it off the hands of the regional command, allowing it to concentrate on offensive action. This headquarters, too, had many gaps in personnel and officers' competence, leaving it relying almost completely on the regional command's staff and units. It seems that it was unable to fulfill its emergency role.

This move, of separating and eliminating territorial defense districts, strengthened regiments – no longer required to man two regimental headquarters (maneuvering and territorial defense district) in wartime, they could focus on force design as a fighting regiment, without being concerned with the issues of territorial defense (at least where related to logistics and combat readiness).

Another major change that took place in the territorial defense array strengthened its command and control during war by setting the territorial defense region as an intermediate echelon, functioning between the territorial defense battalion and area, as a purely operational

command and control headquarters lacking any logistic capabilities. The territorial defense region headquarters was composed of reserve soldiers, mobilized as necessary to command a number of tactically related territorial defense areas. The territorial defense region was organized as either a locality or area defensible against possible enemy action. A fire and counter-strike plan was drawn up for the area under the territorial defense region's responsibility. While front and rear regions were assigned as part of the response to the shortage in fighting equipment, man power, and fortification, the territorial defense region's defensive preparation was unchanged (Operations Directorate, Operations Department, 1953). Localities, as mentioned, afforded better tactical planning of the area's defense, thereby releasing the territorial defense battalions to plan on a higher tactical level, even at campaign level. For the most part, the territorial defense battalions were responsible for a space containing a number of primary and secondary longitudinal axes through which the enemy could infiltrate, while territorial defense regions were set to defend one axis, or a section of an axis.

In the early 1950s, the territorial defense array was organized with the territorial defense area almost unaltered apart from changes in classification. The territorial defense region was established as an emergency control headquarters, and the territorial defense battalion was de facto the highest tactical unit in the array, with only the territorial defense headquarters in the regional command above it.

Border Police companies that performed routine security tasks in the area during peace times were subordinated to the territorial defense array in war and were, usually, required to operate under the command of the territorial defense battalions.

Despite the need to strengthen command and control in war, circumstances did not allow for all territorial defense battalion headquarters to be retained as regular forces, and some were kept as reserves, functionally creating territorial defense battalions for peacetime and wartime (Operations Directorate, Operations department, 1954). With some territorial defense battalions' headquarters becoming reserve units, the process of whittling the territorial defense array down continued, owing to the relatively minimal attention a reserve unit pays to the constant work required for planning and retaining the competence of the territorial defense array in its space.

The very fact of regional territorial defense headquarters being reserve units already burdened the territorial defense battalion with the need to command territorial defense areas directly in times of peace. As peacetime territorial defense battalions were given responsibility over a large space covered by a number of territorial defense battalions in wartime, routine maintenance and attention to territorial defense areas were significantly diminished.

To conclude: in the first years of the state, a territorial defense array was organized, relying on the relationship between settlement and security, so that border spaces, complete with the settlements and civilian facilities in their territory, were used for the needs of a wartime defensive array. Settlements were considered part of the outposts and compounds array, and were organized for this purpose by determining the construction, the materials used (in order to withstand different types of fire), communication trenches and the layout of the bunkers, and so on. Residents were understood to be the manpower required to man the regional defense array, in settlements, headquarters, and higher units (territorial defense regions and battalions). As such, some of them were forced to serve in the array's units, and proper training for professional roles and command was given, and exercises conducted to drill the various levels. Doctrine documents and operational plans on various levels properly defined the relationships and subordination between the forces of the territorial defense array and the maneuvering forces.

It seems that, in theory at least, a response was devised to optimally meet the period's comprehensive threat scenarios – a surprise attack on one or more fronts followed by fighting in several fronts. In practice, however, things were different; the next section will discuss the many omissions.

PLANS VS. PERFORMANCE – THE FIRST HALF OF THE 1950S

While the territorial defense array was well planned and given proper professional instructions, it seems to have run into the problem of resource scarcity in both the military and society at

large, limiting the realization of these plans. A short while after the War of Independence, the territorial defense array's alertness and readiness levels were already far below what was required of it. When the maneuvers performed in 1950 were concluded, many gaps were noted in the territorial defense array, as noted by Israel Bar, assistant to the IDF chief justice: "territorial defense – a significant drop compared to the War of Independence" (Bar, 1950). Bar argued that the regular army could not perform holding and cover missions, which should therefore be given to the territorial defense force. Following the maneuver's debriefing, however, it was realized that the territorial defense force could not fulfill this mission in its current state.

As expected, the territorial defense array was not a high priority in terms of supplying equipment and manpower and was definitely not of the highest quality, particularly in light of the turn to the development of offensive capabilities (armor, paratroopers and air force). Owing to the scarcity of military resources, security committees in settlement movements, as much as the movements themselves, sought both resources and manpower for the array. Their achievements were, however, very limited, and competence and readiness were not improved.

Another gap between planning and execution arose in the professional level of defensive plans in the territorial defense array. It seems that in many cases insufficient attention was given to preparation, and when it was made, it was not particularly professional, or it was not adequately coordinated with all levels (territorial defense area-region-battalion). As one officer wrote: "Exercises achieved one important goal, alerting the settlements again to pay heed to security problems and addressing them, and revealing deficiencies and inadequacies in planning and fighting-alertness in the region" (Regiment/Territorial Defense District 3 headquarters, 1952).

Emphasizing planning insufficiencies, the document "Instructions on Area Planning for Defense" (IDF General Staff/Operations, 1955) stated that knowledge should be sought regarding the weapons and manpower available in the settlements. Changes had taken place in their shape and size, and, further, military considerations were influenced by economic factors. In fact, this document can be seen as an acknowledgement of just how wide the gap between the roles assigned to the territorial defense array and its ability to fulfill them was.

In early 1956, a few months before the Sinai War, Regiment 25's second-in-command Alex Eliraz examined the territorial defense array's readiness and warned of numerous issues, in particular in manpower complement and quality (Office of IDF Deputy Chief of General Staff, 1956b; Regiment 25, 1956). Eliraz also issued a warning regarding settlements composed of new immigrants: "Their residents will escape to the rear, and instead of serving as a security element would be a severe burden on the public's back." Similarly, Shimon Avidan testified to the state of the territorial defense in July of that year, stating:

...our kibbutzim where part of the territorial defense, that is still neglected. In this topic, our experience in the War of Independence was not concluded, there were no decisions about the organization and tactics fitting today-war. There were no leaders training for the territorial defense area commanders. The logistic means required to strengthen the settlements in the front were not invested, and the required fighting equipment was not sufficiently supplied. The territorial defense in its current state does not meet requirements, and the fundamental requirement is: to hold back a possible surprise attack, to allow the required span of time to recruit the reserve forces and be a living defensive wall. (Avidan, 1956)

It seems that, as in the past, notwithstanding the understanding of political and military leaders that the territorial defense array could no longer properly contend with an attack by a regular enemy, some settlement leaders, mainly the kibbutz settlement movements, thought differently, and tried to retain its centrality; the natural implication was, of course, that the settlements required more resources and increased manpower.

Planning and allocation of many resources, mainly work hours, were in the hands of the settlers themselves. Where insufficient time was invested in defensive planning in the various echelons of the territorial defense array, major gaps were discovered, leading the military, and most likely also the residents, to distrust the array's capabilities. It should be noted that even at the eve of the War of Independence, some settlements did not adequately fortify themselves, with residents investing insufficient work. Settlements became aware of the need to properly

entrench and fortify themselves after the first battles – sometimes when it was too late to begin the task. In practice, no response was given to the limitations on settlements' abilities to invest resources in defense during quiet times, and the problem, to an extent, returned to the military and political systems required to allocate resources to solve it.

It seems that the idea to use and rely on territorial defense forces to thwart attacks by regular enemy forces, including infantry, armor and artillery, inevitably declined in the first half of the 1950s, as a result of IDF force design processes and the examination of the nature of modern warfare that inspired them. Alongside the decline in the role of defending against a surprise attack by regular armies, there was a certain rise in some of the array's other roles, such as fighting infiltration in routine security during relative calm. The change in these years was expressed in the objectives and roles of territorial defense forces, from one of holding off a surprise attack by a regular army at the immediate conclusion of the War of Independence, to a similar one detailed, at the eve of the Sinai War, in roles of delay and attrition of the attacking forces, with the understanding that some settlements will be taken or bypassed by the enemy. With time, the territorial defense array received areas of responsibility similar to civil defense, and the burden of impeding an enemy attack was placed on the forces stationed in the border region. Following advances in intelligence, furthermore, an awareness began to form that preparations for an enemy surprise attack could be made. In the field, the decline was expressed in a decline of the array's readiness, diminished attention by high command, and a progressive decrease in resources allocated for the purposes of fortifying settlements, training forces, and so on.

THE LESSONS OF ACTIVATING THE TERRITORIAL DEFENSE ARRAY IN THE SINAI WAR – THE BEGINNING OF A DECLINE

In the Sinai War, the territorial defense array was activated only partially, for the purposes of strengthening defense in fronts other than the main front. To an extent, the lessons could have been written even without activating the array. However, as in other fields, sometimes a significant event is required if lessons are to be generated and examined, even though, as mentioned, the array was only partially activated and did not engage the enemy. The lacks already identified, among them manpower wanting in quantity and quality, fighting equipment, fortification and auxiliary equipment (personal gear, platoon-level equipment, and so on), were of course noted again at the end of the war. Nevertheless, the decline in the territorial defense array continued even after the Sinai War.

While no settlements were evacuated, this sensitive issue was repeatedly mentioned and required discussion in documents concluding the war:

Evacuating non-combatant population is a bad policy. However, there is no doubt that during fighting there will be situations in which evacuation would be necessary in some cases. It is vital however that each and every settlement will have a clear evacuation plan, including the following paragraphs: Who is evacuated; means of evacuation; routes of evacuations; method of evacuations; destination of evacuation; commander of evacuations; sub-commanders. (Har-Tov Territorial Defense Battalion Headquarters, 1956)

The issue of population and evacuation was addressed in planning dossiers of various kinds (see, for example, [Operations Directorate, Operations Department, 1951](#); [General Staff Branch, 1951](#)). But it was apparently not discussed in sufficient detail, and was certainly not drilled in territorial defense maneuvers.⁵ It seems no one wanted to deal with the sensitive topic of evacuating civilians; only in recent years have discussion, planning, and even drills, again taken place.

A document detailing the lessons of the Sinai War ([Operations Directorate, Instruction Department, 1957a](#)), produced by the IDF instruction division, dedicated the last paragraph to territorial defense. The first lesson emphasized the need for a territorial defense headquarters in

⁵ The issue came up during operations and war throughout the years, such as evacuating Ramat Magshimim during the Yom Kippur War, recently during Operation Protective Edge and it seems it will come up again in future operations and conflicts.

the regional command, which could relieve the regional command from dealing with defense, to the point of taking responsibility of the rear area while the command is on the offensive. The second lesson dealt with the need to strengthen wartime territorial defense battalions, affording them the status of a logistically independent unit, in order to ease their function both in peacetime as a reserve unit and in emergency when mobilized, as well as to strengthen their logistics by constructing reserve storage houses for each territorial defense battalion and separating them from those of peacetime territorial defense battalions. In addition, it was recommended that territorial defense battalions be matched with their area of responsibility in terms of size, the number of subordinate regions, and so on. The third lesson addressed the gap in the array's mining and sapping capabilities, suggesting they be bolstered with professional manpower and means. The fourth again discussed the need to regulate manpower and resources recruitment policy in frontier settlements.

On the subject of doctrine, there was mention of a need to “complete the doctrinal book of territorial defense” (*Operations Directorate, Instruction Department, 1957b*) as, despite numerous publications by the Instruction Division and Operations Division, written during the years leading to the Sinai War (see, for example, *IDF General Staff/Operations, 1955; Operations Directorate, Instructions Department, 1952a, 1952b*) there was apparently a gap in organized, official and comprehensive doctrinal literature (which was required to include and integrate the various documents). The territorial defense battalion source book would only be published a number of years later (*IDF General Staff, 1961*) followed, a year later, by the area source book (*IDF General Staff, 1962*). At the conclusion of the Sinai War, another gap, that of a doctrine combining the territorial defense array with the maneuvering forces, was identified (*Operations Directorate, instruction department, 1957b*), although a reading of the doctrine written during the early 1950s shows that it contained a good account of the principles for activating territorial defense combined with maneuvering forces.⁶ We can therefore deduce that the gap was in instruction and the application of doctrinal and Operations Division documents in the forces, and in the allocation of appropriate resources for training, as these features were not normally the subject of exercises preceding the Sinai War.

THE REBIRTH OF TERRITORIAL DEFENSE – A THREAT OF SURPRISE ATTACKS

The territorial defense array declined following the Sinai War, and was no longer perceived to be part of defensive measures designed to meet threats coming from regular armies. It was directed, mainly, to deal with routine security events, mainly terrorist infiltration into frontier settlements, criminal activity, and so on (*Druck, 2017; Fried, 2020*). The IDF continued to hold doctrinal books that stated that the territorial defense array would act in coordination with maneuvering forces when defending against enemy attack, as organizational orders still instructed. In practice, however, this was not the subject of exercises, and for the most part did not appear in operative plans (*Druck, 2017*). In the age of wars against regular armies, the IDF did not consider the territorial defense array capable of being involved in defensive warfare. Thus, it was not allocated a role in the defensive battles in the Yom Kippur War (1973) on the Golan Heights front. In fact, the settlements were evacuated (some in an organized manner, and others under Syrian fire). The intensity of fighting regular armies in the Yom Kippur War emphasized the need to adapt the objectives and roles of the territorial defense array to contend with infiltration by terrorist squads rather than regular forces, as written in the doctrinal text “Forward Territorial Defense,” published by the Ground Forces branch (*IDF Ground Forces Branch, 2001*). Yet, while various publications stated that the array could be incorporated in defensive fighting alongside the regular army, in practice it was not trained or equipped for such action.

The need for a constant examination of security and military arrangement is the never-ending duty of leaders and commanders. Ukraine, for example, established an array of territorial defense units as part of the lessons from the 2014–2015 conflict with Russia in the Donbas region. The Ukrainians established battalion-sized territorial defense units, manned by volunteers who train throughout the year and even take part in routine security missions on the borders and the interior. Such territorial defense units were also established inside large

⁶ In the defense chapter of each book, the publications on battalion and regimental combat from 1951 mentioned incorporating territorial defense forces in the fighting of the relevant unit.

cities, such as Kyiv, and were trained to fight guerrilla warfare against invading military forces, as indeed happened in February 2022, when Russia invaded Ukraine (Maryn, 2022).

These units also serve as an organizational, logistical and instructional infrastructure for the incorporation of volunteers from either the local population or from abroad (Aliyev & Talha, 2022), allowing them to be trained, equipped and mobilized in a relatively short time for offensive and defensive tactical missions against an invading enemy, as is happening in the fighting in Ukraine.

In Israel, it seems that a current examination of the threats on its borders, mainly the Egyptian, Syrian and Lebanese fronts, shows enemy offensive capabilities to be limited in scope and intensity relative to those of the IDF. The relevant comprehensive threat scenario is hostile action in the form of a concentrated offensive move capable of overpowering forces defending a defined area for a limited time. Study of the raids and attacks performed by the various factions in Syria, ISIS and affiliated organizations in Sinai, and raids by the Kurdish underground on Turkish objectives near the border, indicates the necessity for a sufficient and immediate defensive response. It seems that the ability to transport large forces in short time from permanent bases to the combat space determined by the enemy cannot be guaranteed at a pace necessitated by the enemy's method of operation. In the existing conditions, it seems that in certain cases the main forces (not part of the regular order of defending the border in battle) could perform only a pursuing counter attack, reversing the situation, but are not capable of preventing the enemy's offensive (a preemptive counter-attack) or breaking it as it takes place (parallel counter attack).

Therefore, the territorial defense array should be reorganized to allow for a suitable response to these threats, preventing the enemy from achieving morale victories.⁷ Although the territorial defense units are reserve units, they should be regarded as semi-regular and prioritized in terms of man power, equipment, and training even ahead of reserve maneuvering brigades (Druck, 2021). The basis for any response to these comprehensive threat scenarios is the ability to effectively meet the enemy on Israeli territory, assuming that not every action taken beforehand (action to locate and destroy the enemy's base of operation, and to attack forces in transit, for example) would be successful.

First, the definition of IDF's forces defensive objectives in the border area should be reexamined and classified in order to allow a professional discourse regarding the allocation of resources (which are always scarce). Once the defensive objectives in the border area have been determined, with settlements accepting a large share, settlements should be strengthened by a number of resources:

1. Identifying residents fit for reserve service as part of the settlement's defensive array;
2. Equipping and training residents for relevant scenarios and integrating them with routine security and possible additional forces as necessary;
3. Defining company- and battalion-sized units in the settlements capable of mobilization in the border area (these units would have preference over maneuvering forces in the recruitment of local reservists);
4. The establishment of reserve armories in settlements and central locations in the local area for the maintenance of weapons and fighting equipment and to expedite the mobilization process.

Beyond the level of defending the settlement or zone as defined in the early days of the State of Israel it is also prudent that space be organized in such a way as to contain defensive forces and capabilities alongside offensive ones, affording a complete defensive response. The integration of territorial defense forces and maneuvering forces performing border defense must be fundamental and constant; this must be executed more successfully than is currently the case in the Judea and Samaria Division, where there is reasonable communication between settlements' security officers and local civilian rapid reaction forces in each settlement to IDF units that deployed in Judea and Samaria. While it is clear that the residents contributing to settlement defense in my proposal will do so as part of the army reserve forces, they will require special conditions in relation to maintaining competence, joint exercises and so on, if they are

⁷ In this article I only propose actions related to the ground territorial defense array.

to operate effectively in the hour of need. Therefore, the commander of a unit responsible for one or more settlements must see its defense force as an integral part of the defensive capabilities in the region – they should train with it, train it, and coordinate plans with it.

In addition, it should be examined which settlements should be evacuated in which scenarios or alert situations, in order to reduce the number of defensive objectives for IDF's forces (in light of the constant scarcity of manpower and means), as well as the enemy's operational possibilities. The idea of evacuating settlements has been debated continually in Israel since the War of Independence; it is not new. While the evacuation of settlements affects the morale of population and leadership alike, suitable preparation, of both the public and the political system, can allow this tool to be used effectively, retaining it at the tactical level and removing it as a strategic consideration.

If it is to provide an adequate response, Israel's border defense cannot continue to rely on standing and reserve forces over-extended along the defensive sectors. What is required is a combined response of permanent forces of various sizes at the defensive objectives, primarily settlements, and maneuvering forces positioned regularly along defended borders. Only such a combined response, with a strengthened permanent defensive element inside defensive objectives, based on local residents, would allow for an efficient response to enemy surprise attacks, consistent with the plans and operational capabilities of surrounding antagonists. An appropriate offensive component able to locate and destroy these enemy forces in their bases and in transit, as well as other, mainly technological, components affording the possibility of location and alerting against enemy actions in a timely manner, is also required.

CONCLUSION – TERRITORIAL DEFENSE ORGANIZATION AND INTEGRATION

The response to present and near-future challenges in Israel's border area, particularly in times of emergency and war, must be able to draw on a ready and competent territorial defense structure that should rely on the principles of territorial defense as formulated in the first half of the 1950s. It should be reorganized, echoing these principles, into a territorial defense array founded on local residents, equipped with means suitable for dealing with surprise attacks by light or motorized infantry and trained alongside standing and reserve defensive forces in operational deployment. As part of the configuration's force design processes, relevant chapters of the IDF doctrine should be updated (notably defense chapter in operations doctrine, border defense doctrine, and various techniques related to the border area). My recommendation to the IDF and to other armies experiencing similar challenges along their borders such as Ukraine (which already employs similar measures), Finland, Sweden and Poland, among others, is to adopt the territorial defense concepts written into the battalion, regiment, and brigade doctrine during World War II in Britain as part of the Home Guard, and subsequently developed by the IDF in the early 1950s.

Territorial defense based on local residents as reserve army units would not only allow defense against invading enemy forces to be organized expeditiously; it would permit resources to be reallocated from standing forces in border regions to routine security functions. Strong territorial defense units known to be able to rapidly equip and deploy in key locations in conflict areas in their own territory would also deter local militias from employing terrorism and guerrilla warfare against local populations and government institutions. Therefore, in lieu of large scale wars and with the rising threat of a limited military invasion and raids by non-state organizations and guerrilla warfare, the territorial defense structure should be reinstated; where it already exists, it should be strengthened in manpower, equipment and training.

COMPETING INTERESTS

The author has no competing interests to declare.

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