

Progovernment militias, identity leadership, and ethnic defection: Evidence from Israel's recruitment of the South Lebanese Army

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Abstract

Ethnic defection has been identified as a potential game changer in conflicts. However, the factors that enable this process require further study. One factor that has been often overlooked is that of social identity and, more particularly, identity leadership. Ethnic defection is a social as much as it is a political process. Incumbents who can utilize this element may be more successful in encouraging a continuous and more persistent process of ethnic defection. A particularly useful tool for counterinsurgency (COIN) leaders to function as identity leaders is that of militias. Traditionally perceived in the literature as ad hoc outcomes of defection, this article demonstrates how militia recruitment can serve as a platform for recruiters to serve as identity leaders and create among recruits a distinct sense of identity that further distances them from other group members and strengthens their group identity. Success in enabling this group categorization could pave the way for more defectors to switch to the government side in a way less relevant than material incentives. The article illustrates this process by employing the case of Israel's recruitment of Shi'a defectors into pro-Israel militias in South Lebanon and the Security Belt during the 1980s and 1990s.

KEYWORDS

ethnic conflicts, ethnic defection, identity leadership, Israel, progovernment militias

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INTRODUCTION

Studies have identified ethnic defection, the process in which a group switches its loyalty from one side to another during conflict, as critical for counterinsurgency (COIN) success, with the potential to tilt the balance between the warring parties (Kalyvas, 2008; Lyall, 2010; Staniland, 2012). This has driven researchers to explore the mechanisms that drive ethnic defection, with works highlighting coercion, material incentives, and internal dynamics as causes of ethnic defection among rebels (Aliyev, 2019; Carey & Mitchell, 2017; Seymour, 2014).

This article seeks to introduce another factor affecting ethnic defection: *identity leadership*. Social identity is central to ethnic conflicts. The extent to which members identify with their group shapes their decision to participate in violence (Moss, 2017; Sambanis & Shayo, 2013; Ward, 2022). Thus, ethnic defection necessarily involves questions of group identity as it means a disconnect between the defectors and their original group. Therefore, defection is a social and psychological act as much as a tactical one, involving deliberation and rationalization on the defectors' side. Here identity leadership becomes relevant. Identity leadership means the “leaders' capacity to influence and mobilize others by virtue of leaders' abilities to represent, advance, create and embed a sense of social identity that is shared with potential followers” (Haslam et al., 2023, p. 3). As the article seeks to demonstrate, incumbents who utilize defection to shape defectors' identities may be more successful in encouraging a long-term mass defection of rebels or members of their community.

The article also identifies an important tool enabling identity leadership: militia recruitment. Studies have traced a correlation between ethnic defection and militia formation (Carey & Mitchell, 2017; Staniland, 2012; Voller, 2023). However, most works generally perceive the tactic of recruiting defectors as an outcome of defection. This article offers a different perspective. It argues that recruiting defectors to support counterinsurgency efforts, especially at an early stage of defection, when the first defectors switch sides, is critical for the incumbents' role as identity leaders and therefore the sustaining of defection. Following John Turner's (2005) assertion that “the psychological group is a precondition of influence, not simply an outcome” (p. 4), the psychological group in this case being the defectors organized into militias, the article demonstrates that militias are not necessarily the product of defection but a factor that enables the process of ethnic defection.

This conclusion does not dismiss the relevance of other drivers of side switching. It does argue that ethnic defection is a process, in which incumbents are likely to seek to affect the defectors' social identity. As part of this process, the incumbents, who under the strains of the civil war are on a search for support and manpower (Ahram, 2011; Pischedda, 2020; Voller, 2023), identify the potential for schisms within the rebel constituency, when an initial group of defectors switches to the government side. Organizing these groups into an ad hoc irregular force, recruiters can now serve as identity leaders, seeking to strengthen the defectors' ingroup identity. This, in turn, can appeal to others within the original group, thus paving the way for more schisms and defectors to switch to the government side, resulting in longer-lasting ethnic defection.

Cases in which ethnic defection and militia recruitment correlate are many, as this article demonstrates below. However, this article uses Israel's reliance on the South Lebanon Army (*Jaysh Lubnan al-Janoubi*, henceforth SLA) as a case study, focusing primarily on the ethnic defection of Shi'a fighters to this militia. First, however, the article establishes the correlation between ethnic defection and militia recruitment. This is followed by a discussion about identity leadership and then an analysis of how militia recruitment facilitates this defection.

UNDERSTANDING ETHNIC DEFECTION

Ethnic defection is the overall process that this research seeks to explicate. Schisms and fissions are common phenomena in human organizations. Members of a group, be that a nation, religion, or political party, regularly deliberate about the aims and norms of their group and self-categorization (Sani & Reicher, 2000). At times, deliberations may bridge the gaps and lead to a consensus. At others, they might strengthen fault lines within the group, resulting in schisms and frictions (Hart & Van Vugt, 2006; Packer, 2011; Sani, 2008). Among armed groups, such as rebels, fissions may lead to infighting and eventually side switching (Pischedda, 2020).

In the first study to introduce the concept, Stathis Kalyvas (2008) described ethnic defection as “a process whereby individuals join organizations explicitly opposed to the national aspirations of the ethnic group with which they identify and end up fighting against their coethnics” (p. 1045). Scholars building upon Kalyvas's work have treated ethnic defection as the shift of a cluster of individuals, such as tribes, clans, or villages, from their wider kinship group to the other side, with rebels switching to the government side the more common example (Biberman, 2018; Lyall, 2010; Seymour, 2014; Staniland, 2012; Voller, 2023).¹ As cases of rebels switching to government side is far more common, this article focuses on a case of this category: the defection of Lebanese to Israel's side during the latter's occupation of South Lebanon.

Ethnic defection, to be clear, does not mean an *identity shift*, as the defectors do not shed their ethnic/national/religious identity and adopt their adversaries' (Kalyvas, 2008, p. 1045). They do, however, detach themselves from their original group, which also involves shifting their loyalty to that of the other side. The decision to switch sides and abandon their wider group lies first and foremost in the defectors. Rebel groups may disagree about strategies, framing of aims, ideology, and competition over resources. Paradoxically, insurgents that share an ethnic background are more inclined to interrebel fighting, mainly because of competition over the same population, territory, and resources (Pischedda, 2020). Ideological differences, too, play a part in schisms. Huseyn Aliyev (2019), analyzing the defection of Russian speakers to the Ukrainian side during the conflict in 2014–15, observes that it is *ethnic responsibility*, namely the defectors' notion that other rebels were violating their communities' values, that drove side switching.

However, although defectors' agency is significant, incumbents are not passive bystanders in this process. Ethnic defection has tilted the balance for governments in their COIN operations, for example, in Russia and Iraq (Lyall, 2010; Mansoor, 2013). Moreover, defection allows the government to signal to other members of the rebel constituency, their own supporters, and international audiences that its war is just, legitimate, and winnable. Hence, COIN leaders are incentivized to instigate defection (Bakke et al., 2012; Otto, 2018; Seymour, 2014). But how do leaders enable this process?

Most studies have focused on two explanations: bribery, usually with money or arms; and coercion (Biberman, 2018; Carey & Mitchell, 2017; Oppenheim et al., 2015; Pischedda, 2020). While these explanations are valid, other factors do exist and deserve more attention. Social and psychological reasons, too, are relevant for ethnic defection. Social identity—the individual's “knowledge that he belongs to certain social groups together with some emotional and value significance to him of his membership” (Tajfel, 1974, p. 72)—Steffens et al. (2014) suggest, “makes possible all meaningful forms of group behavior” (p. 1002). This is true for conflict as well, as collective identity drives individuals' choice to fight for a shared goal. Material incentives and payoffs are insufficient to explain the decision of entire subgroups, as the costs

¹Otto et al. (2020, 5) have identified that 49% of the cases of ethnic defection are of rebels switching to the government side, while only 31% are of the opposite cases.

of such a move are high and can result in an irreconcilable rift between the defectors and their former group (Sambanis & Shayo, 2013; Sani, 2008).

Here identity leadership becomes relevant. Incumbents can use their resources to help defectors form a group to protect themselves and act collectively. They do so out of the need to accommodate the defectors and utilize their abilities for COIN. Nevertheless, by doing so, they inevitably reconstruct the defectors' social identity and build a new "us" and "them" (Moss, 2017). Before discussing this, it is worth focusing on one mechanism involved in ethnic defection: militia formation and the recruitment of defectors.

MILITIAS AND ETHNIC DEFECTION: THE CORRELATION

If ethnic defection is the broader process under investigation, militia recruitment is an intermediary stage. Defection may take different forms. Passive support is one form, although it is less desirable because it does not utilize fully the defectors' advantages in the field. Governments may also recruit defectors into the regular forces. Yet in most cases they prefer to recruit defectors, at least in the first waves, to irregular forces, mainly because they remain mistrustful of side switchers (Lyall, 2010; Oppenheim et al., 2015; Seymour, 2014).

Studies in the field have highlighted authorities' benefits in outsourcing violence, mainly filling their ranks with local proxies with intimate knowledge of the field at a relatively low cost (Ahram, 2011; Carey & Mitchell, 2017; Seymour, 2014; Staniland, 2012). Nevertheless, this article suggests that militia recruitment is not merely a byproduct of ethnic defection. It is, in fact, a potentially critical stage in the process of defection. The incumbent's ability to organize defectors at an early stage of the process, when the first rebels switch sides, can enhance defection and result in a more protracted process.

Recruitment into militias inexorably stimulates group identification. Fighting alongside the government against former group members deepens schisms between the defectors and their former group and can lead to blood revenge and retaliation cycles. The defectors' survival, then, depends on their collective action against their former group. This negative identification through militia recruitment has gained some attention (Biberman, 2018; Lyall, 2010; Voller, 2023). However, this study suggests that forming militias enables COIN architects to take a more proactive role, that of identity leaders who can foster ingroup identification and self-categorization by offering new norms, values, attitudes, and behaviors. These, in turn, can pave the way for more former rebels or sympathizers to defect.

Examples of a correlation between the existence of progovernment militias and prolonged defection are abundant and can be found in Syria (Voller, 2022), Sudan (Seymour, 2014), Iraq (Mansoor, 2013), Chechnya (Lyall, 2010), Turkey (Biberman, 2018), Ukraine (Aliyev, 2019), and, of course, the case of Lebanon discussed in this article. However, a further demonstration of the correlation between militia recruitment and the robustness of defection is a case of failure of inciting ethnic defection, namely Israel's failure to secure a long-term defection in the occupied West Bank and Gaza Strip. Plans to instigate mass side switching among the Palestinians in the West Bank existed. As the Palestine Liberation Organization (PLO) was gaining popularity among Palestinian youth in the 1970s, officers in the Military Governorate (transformed into the Civil Administration in 1981) envisioned local conservative alternatives to the PLO that were more willing to collaborate with the authorities. The result of this plan was the Village Leagues (*Rawabit al-Qura'*). The Village Leagues represented conservative elements within the Palestinian society that sought to counteract the PLO's radicalizing influence in the countryside (Cohen, 2013, 258). Although more homogenous religiously than the Lebanese population, the Palestinian society in the West Bank experienced divisions based on clans (*hamulahs*). Rivalries and schisms between clans had hindered Palestinian cohesion and ability to coordinate action against the British and the Yishuv in the past (Khalaf, 1992; Nashif, 1977).

The architects of the Village Leagues system, Brigadier General Menahem Milson and Yigal Karmon, sought to capitalize on clan fault lines and rural–urban tensions to encourage mass ethnic defection (Cohen, 2013, p. 258).

Although Milson and Karmon succeeded in setting up the Leagues, the system did not translate into mass defection. In a relevant comparison, Salim Tamari (1983) stresses that Israel failed to establish in the West Bank and Gaza similar “native surrogates” as “Saad Haddad's [the SLA's founder and first commander] militias in South Lebanon” (p. 41). Here, the absence of recruitment of irregulars is notable. Karmon (2013), one of the system's architects, claimed that “There was no intent to form ‘militias’ out of the Village Leagues” (p. 184). Karmon and Milson did try to push the Likud government to arm the Leagues' leaders and their clans. However, and despite support from some in the IDF and the Labor Party who saw this as an opportunity to find Palestinian allies (Knesset, 1983), resistance within the ruling Likud party, chiefly by the prosettlers' lobby, derailed this plan (Cohen, 2013; Karmon, 2013, pp. 185–86). The IDF then turned to collect the few weapons it had already handed to Leagues' leaders. Gradually, under pressure by the PLO and amid little support from even their potential constituents in the countryside, the Leagues ceased to exist (Bar-Yosef, 1989). With the Israeli authorities refusing to organize the Village Leagues and their supporters into progovernment militias, Palestinian ethnic defection failed to take place.

This section has presented the function of militia recruitment as an essential stage in ethnic defection. The examples discussed in this section highlight the potential correlation between militia recruitment and prolonged defection. However, what explains this correlation? How is identity leadership linked to this process? The following section provides a theoretical explanation to these questions.

ETHNIC DEFECTION AND IDENTITY LEADERSHIP

For social identity theorists, attachment to a group shapes members' perception of self and others, or the sense of “us” and “them.” The underlying idea of the social identity approach is that group membership drives the members to follow what they comprehend as their group's prototypical behavior, consistent with its perceived identity. Social identification, namely how individuals associate their values, norms, and actions with their group, shapes not only to which group(s) individuals belong but also the resources they dedicate to their group (Sambanis & Shayo, 2013). At the same time, belonging to a group facilitates self-categorization among members, which in turn drives them to regulate their behavior according to the group's expectations, norms, and interests (Haslam et al., 2020; Oakes et al., 1994; Platow et al., 2015; Sani & Reicher, 2000). Muzafer Sherif and Carolyn Wood Sherif (1969, pt. 19) summarized this relation between the social group and the individual by contending that while “man [sic] creates social organization... social organization... recasts man” (as cited by Platow et al., 2015, p. 278).

Social identity, nevertheless, constantly evolves. Self-categorization is affected by instrumental, normative, and ideational considerations, and these may change because of different factors. For example, a rivalry with other groups can be one cause for changes in these considerations. Alternatively, greater mobility between groups can also affect self-categorization and sense of belonging (Tajfel, 1974). It is necessary to follow and understand these changes in self-categorization because they often lead schisms within and, eventually, the splitting of groups, (Hart & Van Vugt, 2006; van Knippenberg, 2023; Moss, 2017; Sambanis & Shayo, 2013).

Once such splits happen, the departing subgroup is in need of defining their new collective identity. The detachment from their broader group means that this new collective needs to redefine itself both to its former group and new allies. Perceptions toward the members of the original group and a sense of animosity certainly contribute to the development of a new

identity among the departers. Negative perceptions, or their stereotyping, is an important motivation (Aliyev, 2019; Oakes et al., 1994).

However, hostility and rivalry between groups is not enough to establish new identities. The social identity approach literature has come to identify leadership as a positive force in constructing a group identity. Leaders are measured by their ability to mobilize support across sectors to achieve their goals. In some cases, leaders use coercion or manipulation to shape their group's social identity (Turner, 2005). However, in others (or simultaneously to using coercion), leaders mobilize supporters by constructing identities, thus functioning not only as group, but also as identity leaders. Schisms, splits, and defection are opportunities, which leaders use to stimulate changes in the new group's social identity. The leader's ability to affect social identity and self-categorization stands at the heart of the concept of identity leadership, that is, the leader's ability to facilitate the emergence of a social identity among the group members and their willingness to cooperate to achieve shared goals (Haslam et al., 2019, 2020, 2023; Krug et al., 2021). Seeking to clearly identify identity leadership, Steffens et al. (2014) have identified four acts that constitute identity leadership: identity entrepreneurship, prototypicality, identity advancement, and identity impresarioship.

Identity entrepreneurship is about “Making different people all feel that they are part of the same group and increasing cohesion and inclusiveness. Clarifying people's understanding of what the group stands (and does not stand) for by defining core values, norms, and ideals” (Steffens et al., 2014, p. 1004). Leaders who function as identity entrepreneurs help to sharpen the sense of “we” in a way that, on the one hand, crafts “a definition that is both plausible and appropriate to one's purposes,” but on the other, makes “one's accounts of identity seem obvious, effortless, authentic and ‘natural’” (Haslam et al., 2020, pp. 129–30). Recent studies of social identity have recognized identity entrepreneurship's importance in shaping groups' actions and behavior. Successful identity entrepreneurship means “[galvanizing] individuals' otherwise idiosyncratic motivations and to harness the transformative power of their coordinated energies,” thus enhancing self-categorization (Steffens et al., 2014, p. 1004). This, in turn, facilitates collaboration and determines what collaboration will look like and which actors will collaborate (Gkinopoulos & Hegarty, 2018; Haslam et al., 2020; Jansen & Delahaij, 2020).

Prototypicality means the leaders' ability to present themselves as being representative of the group and its members—leaders who are perceived by members as the prototypes of the group, who embody the “core attributes of the group that make this group special as well as distinct from other groups” (Steffens et al., 2014, p. 1003). In this sense, the leaders are not expected to be ordinary group members, but rather extraordinary, having greater charisma and demonstrating greater capabilities, which in turn garner more support from the group members (Haslam et al., 2020, 2023).

Beyond representing the group's identity, leaders are able to mobilize collective action if their group also perceives them as *identity advancers*, namely as acting on behalf of, or defending, the group's common interests when facing a risk (Haslam et al., 2020; op't Roodt, Krug, and Otto 2021, p. 3; Steffens et al., 2014, p. 1003). When introducing new practices or holding rituals that aim to mobilize group members toward collective action, they will need to demonstrate how these still resonate with the group's social identity and self-categorization (Haslam et al., 2020; van Knippenberg, 2023).

However, prototypicality, identity crafting, and advancement cannot achieve collective action if the leaders fail to deliver material artifacts, or “doing it for us,” namely without *identity impresarioship*. Success in competing or combating against other groups is one achievement, directly linked with the leader's success in fostering a sense of group identification. Subsequently, group leaders who are perceived as outsiders will be held more accountable if they fail to deliver successes or other material artifacts. On the other hand, “Not surprisingly, in intragroup contexts, stronger endorsements are provided to leaders who distribute resources in a normatively fair... manner” (Platow & van Knippenberg, 2001, p. 1509). The more successful leaders

are in delivering these, the more the group is willing to internalize the norms, practices, and values that these leaders advance, accept their prototypicality, and act collectively (Haslam & Platow, 2001; Steffens et al., 2013, 2021).

Identity leadership has played a part in driving collective action among a wide range of social groups, from relatively narrow constellations, such as the family, to political movements, religious or ethnic communities, members of a profession, and even class, as all these categories share a sense of collective identification, interests, and myths—namely social identity (Steffens et al., 2014). Politicians and party leaders (Hagström & Gustafsson, 2015; Haslam et al., 2020; Mols, 2012), religious scholars (Matthiesen, 2015), and trade unionists (Jansson, 2020) can all serve as identity leaders, who motivate various forms of collective action, varying from a passive endorsement of candidates and parties or supporting social or political causes to more vigorous actions such as rallies, strikes, and fighting.

Ethnic defection, too, is a collective action of which social identity is essential. Ethnic defectors often already have a sense of shared identity when they switch sides, usually revolving around kinship, such as family, clan, religious or geographical background. Nevertheless, their side switching necessitates rethinking their self-categorization vis-à-vis their former group and their new partners. These defectors may see themselves as representing the wider group's real values, norms, and practices and depart from their group because it does not seem to represent these anymore. This sense of righteousness can serve the renegading group in negatively stereotyping the group they had left (Crane & Platow, 2010; Oakes et al., 1994; Packer, 2008). However, it remains for them to define their values and goals in fighting their former kin or comrades.

This moment, in which groups and fault lines transform, allows savvy COIN leaders to offer defectors new ways to reorganize themselves as a group, adopt new practices and norms, and self-categorize. Militias offer an ideal way for the recruiters to achieve these goals. Militia commanders have direct access to the recruits, who now depend on them for arms, protection, and support, but they also need to redefine their affiliation and goals.

MILITIAS AND IDENTITY LEADERSHIP

COIN operatives rarely, if at all, define their actions in terms of social identity. They aim to mobilize supporters to win conflicts. Nevertheless, defection is essentially a collective action that cannot occur without a sense of group identification among the defectors. This is where commanders become identity leaders, even if they do not define themselves as such. Still, one may question the article's focus on militias. After all, scholars of social identity have identified the regular armed forces as arenas for identity leadership. Military service, too, is a collective action that requires mobilizing individuals willing to sacrifice themselves for a shared goal (Griffith, 2009; White et al., 2021). Armies openly aspire to shape recruits' social identities, sense of belonging, and readiness for collective action (Edmunds, 2006; Gaub, 2011; Moskos, 1993). In these processes, commanders and officers function as identity entrepreneurs, advancers, and impresarios who help to shape soldiers' sense of belonging (Jansen & Delahaij, 2020).

Nevertheless, when it comes to organizing defectors, militia recruitment is often the preferred method. First, as noted above, authorities are usually mistrustful toward defectors and are hesitant to integrate them into state institutions. Moreover, often the incumbents' priority in COIN is not to encourage an identity shift but to deepen cleavages among the rebel constituency to undermine the insurgents (Bakke et al., 2012; Voller, 2023). However, militias, too, provide the platform for positive identity formation and self-categorization. Holding tribal and religious ceremonies, for example, accentuates the recruits' fault lines vis-à-vis other members of their former group, and they also link these elements in their identity with the new force.

Parades in which fighters can display their access to weapons and other resources can help to project their power vis-à-vis their new rivals.

Thus, we can identify a potentially cyclical process combining ethnic defection, militia recruitment, and identity leadership. The first defectors, who break with their original group, communicate with the authorities. Vulnerable or looking for a window of opportunity to defeat their rivals (Pischedda, 2020), these rebels express their willingness to collaborate with the government. By organizing them, the incumbents gain direct access to the collaborators and use their recruitment to affect their sense of “we” and “them” versus their original group. Antagonism and prejudices among the renegades and their group certainly play a part in this development. Recruitment also enables a positive ingroup identification by introducing new symbols, practices, and values; delivering benefits such as access to new resources; and creating a framework that galvanizes the recruits to accentuate the uniqueness of their identity. If successful, the defectors project their achievements and power, appealing for more subgroups among the rebel constituency to consider defection. The link is between militia recruitment, identity leadership, and the continuation and sustainability of ethnic defection. Israel's recruitment of Shi'a defectors to its proxy militia in South Lebanon illustrates the link between recruitment and defection.

A CASE OF ETHNIC DEFECTION: ISRAEL IN SOUTH LEBANON

The case study describes Israel's control over parts of South Lebanon, primarily the Security Belt (or Zone), lasting from 1982 until 2000. Israel created the Security Belt following its withdrawal from Beirut. Aiming to protect Israeli border towns from PLO attacks from Lebanon, the Security Belt encompassed about 350 square miles (about 10% of Lebanon's territory) and was home to approximately 150,000–200,000 inhabitants in 67 villages and towns.

The SLA, a militia that drew on the Southern Lebanese population, was crucial for Israel's rule of the Security Belt. The SLA not only fought insurgents but also helped Israel to administer the population and, no less importantly, legitimize Israel's hold of South Lebanon by enabling Israeli officials that were not directly controlling the region. Therefore, Israel recruited, organized, led, trained, armed, and financed the SLA.

The SLA serves as a fascinating case of ethnic defection. The SLA's founders were Christian officers of the defunct Lebanese Army. Disconnected from other Christian communities due to the Lebanese Civil War and the PLO's control over parts of South Lebanon, these officers, led by Major Sa'ad Haddad, turned to Israel in 1979 for help and offered their services in fighting the PLO in return for arms and support. These officers served as the basis for what in 1984 would become the SLA (O'Ballance, 1998, p. 75). Christians initially dominated the SLA ranks. Nevertheless, in the mid-1980s, the militia had a strong Shi'a contingency, and by the late 1980s, Shi'a were the majority of the rank and file, although Christians dominated the officer corps. Along with the Shi'a, the SLA also had a small Druze contingency, drawing mainly from the Hasbaya region.

Shi'a defection to Israel's side as part of the SLA deserves much of our attention as it reflects the model presented in this article. Lebanese Christians had a history of tacit and open collaboration in Israel before and during the civil war, which made it less costly for Haddad and his officers to turn to Israel. The Druze, too, could rationalize such a move in light of the Israeli Druze's integration into the state. This was not the case with the Shi'a recruits. Unlike the Christians, Lebanese Shi'a had no historical ties with Israel, and most Shi'a sympathized with the Palestinians for religious reasons (Kifner, 1984). Some had even “served in Palestinian or pro-Palestinian organizations” before renegading (Beydoun, 1992, p. 45). The Shi'a armed groups *Amal* and *Hezbollah* were to lead the resistance against Israel's presence in Lebanon. Hence, Shi'a defection serves as an ideal case.

Shi'a collaboration with Israel started in the late 1970s at a small scale, with local bands of armed men operating at the village or town level. However, Israeli recruiters successfully organized these collaborators and integrated them into the newly founded SLA. Since then and until the SLA's collapse, Shi'a recruits consistently joined the SLA, eventually constituting the backbone of recruits. Material incentives, such as salaries to recruits and benefits to family members, existed, as did efforts by the SLA to coerce Shi'a men into recruitment. Nonetheless, as the analysis below demonstrates, and in line with the literature on schisms in conflict (Sambanis & Shayo, 2013; Sani, 2008), such factors were not enough to generate a long and robust process of defection, especially given that Shi'a organizations such as Amal and Hezbollah offered similar monetary incentives to recruits and threats of violence toward collaborators with Israel.

Here, Israeli recruiters' function as identity leaders becomes relevant. They did so in the following ways: They functioned as prototypes to the SLA fighters by presenting themselves as the image of a vulnerable community still capable of defending itself against external enemies. As identity entrepreneurs, they fostered a sense of identity among Southern Shi'a, driving the Shi'a recruits to view themselves as defending their homes against foreigners (including Shi'a from other parts of Lebanon). They also linked this image with other norms and values of the Southern population: strength (through the possession of arms), honor (through access to military equipment), and protection of the home and family. They advanced the group's identity by linking service in the pro-Israel forces with the above values but also used Shi'a symbolism and legitimation to persuade recruits that a true Shi'a identity is linked with the defense of their home and community. As identity impresarios, they provided the recruits with material incentives, whether access to arms, financial opportunities to family members, or victories over potential threats, such as the PLO or other external actors, including other Shi'a insurgents.

The roots of Shi'a defection date back to the first years of the civil war in Lebanon. Like the Christians, Shi'a in the South became disconnected from the other Shi'a concentrations in the Beqa' Valley and Beirut's southern suburbs due to the civil war (Rabinovich, 1984, p. 175). This disconnect also had an ideological dimension, with Shi'a in Beirut adhering to radical movements, such as the Communist Party or the Movement of the Deprived (*Harakat al-Mahrumin*), later evolving into Amal. In contrast, Shi'a in the Southern countryside remained organized mainly around the traditional feudal structures, in which the notable families, or *zu'ama'* (plural form of *za'im*), remained dominant (Siklawi, 2012).

Facing pressures from the PLO in the 1970s, Shi'a Southerners sought ways to defend themselves. Aware of this predicament, Israeli officials contacted these groups. Offering them weapons, these agents could appeal to a small number of Shi'a and organize them in groups. Some of these were no more than armed gangs of around 20–50 fighters, revolving around local strongmen in villages such as Jwaya, Bira'shit, and Qlayleh (Smit, 2000, pp. 174–75). These groups concentrated on intelligence gathering and protecting their villages and neighborhoods.

In 1982, after the IDF had fully invaded Lebanon, Israeli intelligence agents tried to expand this recruitment by forming the National Guard for the Villages of the South (*al-Haras al-Watani li Qura' al-Janub*). IDF officers traveled across villages south of Tyre, meeting with *mukhtars* (village elders) to convince or pressure them into accepting such guards in their villages. These efforts had limited success, with only a few *mukhtars* willing to collaborate. Still, a reporter in Lebanon suggested that, given these militias' lowly tasks, the number of recruits exceeded the IDF's expectations (Spiegel, 1984b). The Israeli officers saw the attraction of Shi'a defectors as critical to legitimizing Israel's control of South Lebanon, presenting it as an indirect involvement to aid the embattled local population against Palestinian aggression (Beydoun, 1992, p. 45). Augustus Richard Norton (1983), a close observer of Israeli presence in Lebanon, reported that Shi'a fighters are “of little military consequence, but they provide a façade for the involvement of Israelis.” Nevertheless, the more involved Israel became in

Lebanon, and as the SLA was taking shape, the greater the need for Shi'a recruits became, and Israeli agents intensified the recruitment efforts.

The fear of the PLO's resurgence was the initial incentive for the Shi'a to join the pro-Israeli militia. Still, the IDF began offering them material incentives to appeal to more Shi'a to join the budding SLA. These included salaries to recruits and work permits in Israel for their relatives. At the same time, the SLA's commanders tried to use coercion to recruit Shi'a, mainly by conditioning the release of family members of potential recruits by their joining the SLA ranks (Smit, 2000, pp. 178–79; 223–24). Although these factors may have appealed to the first recruits, especially to the National Guards, they are insufficient in explaining the following waves of recruits. Again, already by 1984, the proportion of Shi'a and Druze rose to about 30 percent of the SLA's manpower (Smit, 2000, p. 223). In the third round of basic training provided to recruits, 80% of the 128 fighters were Shi'a (Rahat, 1984); many of them were organized into exclusive Shi'a units near their villages. And their numbers, of course, kept increasing.

At the same time, the pressures on recruits from the side of Shi'a insurgents intensified. Amal and Shi'a clerics publicly condemned those joining the National Guards or even receiving weapons from Israel (Blanford, 2011). These condemnations soon escalated into assassinations of National Guard leaders (Hamilton, 1984; Smit, 2000, p. 176). Hezbollah was even more punitive toward Shi'a SLA fighters, harassing their families and assassinating recruits more than Druze and Christian captives (Gabrielsen, 2014). The salaries offered by the SLA, in return, were relatively modest, and SLA recruits occasionally protested about their salaries (Walter, 1987a). At the same time, Hezbollah, financially supported by Iran as part of the latter's backing of Shi'a movements in the Middle East, Hezbollah could offer its recruits salaries of similar value to the ones Israel offered to the SLA fighters (O'Ballance, 1998, p. 152). Coercion, too, did not guarantee loyalty, as SLA recruits sometimes defected when it was in their interest to do so.

Here, identity leadership came into the picture to supplement the material incentives. Israeli officers and intelligence agents worked closely with the militias, officially as their mentors, when IDF officers supervising SLA commanders were introduced as *honkhim* (tutors) (Fishman, 1990), but in reality, they were the top leaders of these forces. These agents and officers came to operate as identity leaders in several ways. These tutors projected Israel's self-perceived image: a vulnerable minority that, despite constant threats, had become a powerful actor capable of protecting its people and deterring its enemies. An eloquent illustration of this perception has been made recently by a former senior member of the Lebanese Forces, the Christian militia in the Lebanese civil war, which Israel aided in the early 1980s. Reflecting on his party's collaboration with Israel, he explains in a documentary interview that training by Israeli agents “was like a dream. I had so much respect for them and their power. I wanted to become exactly like Israel... to be able to impose our will and to do whatever we want by force. The goal was to try and mimic them” (Raheb, 2012). Although neither Lebanese nor Shi'a, the IDF played on one of the primary aspirations of the Shi'a community in Lebanon, namely self-defense and the search for honor amid years of marginalization by other communities. Association with the IDF served the Shi'a in the South to project an image of power.

The IDF also served as identity impresarios in this regard. By delivering arms to the Shi'a recruits, the Israeli authorities provided the Shi'a youth who joined the National Guards and later the SLA with the ability to project their power. These guns may have been antiquated, taken mainly from old Soviet stockpiles that Israel had captured in Syria. Nevertheless, they served the militiamen not only in fighting the insurgents but also in displaying their power to their local communities. Shi'a National Guard leaders and their fighters toured villages exhibiting the arms and vehicles delivered to them by the IDF, demonstrating their newly earned power. Some of the National Guards leaders were members of the *zu'ama'* and used these weapons in meetings with supporting clans (Smit, 2000, p. 176). In other cases, the IDF held

rallies for National Guards, in which they paraded in their villages in uniforms, driving military vehicles and touting weapons Israel handed them (Rahat, 1980).

Tanks, mainly, induced a sense of pride and empowerment among the Shi'a recruits. In 1980, IDF instructors and Major Haddad organized tank training for National Guard fighters. The training was on outdated Sherman tanks, and ammunition was scarce. This notwithstanding, the training left a great impression on the young recruits. One of the IDF officers responsible for the event explained that "in the hierarchy of the rural Shi'a in South Lebanon, the graduates of tank training in the militias are considered practically national heroes... It gives them immense pride... and will likely increase Shi'a motivation to volunteer" (Weiss, 1980, p. 16). Despite having no military background, the IDF also sent Shi'a and Druze cadets in disproportional numbers to the first SLA officers' training corps and decorated them before they were commissioned (Segal, 1984). This move empowered the recruits and also exposed them to indoctrination.

The IDF architects of the SLA also assumed the role of identity entrepreneurs, seeking to foster a sense of localized Shi'a identity, standing up to external threats to their identity, community, and practices. Israeli officers acknowledged early the need to convince the Shi'a that "by joining the army, they are not being traitors," as one IDF officer explained to correspondents (Hamilton, 1984). Major Haddad and, after his death, his successor, General Antoine Lahad, traveled across Shi'a communities to spread this message, meeting with mukhtars and clerics. The Shi'a defectors embraced this message. Hayder al-Da'ikh from Jwaya, one of the first National Guard heads, described himself as a patriot, using his contacts with Israel to defend the South from the PLO and left-wing factions (Smit, 2000, p. 174). In an interview, a Shi'a militiaman from the village of Kila explained, "You cannot describe the feeling. You are going to protect your home and your family. This is the holiest of wars" (Weiss, 1980, p. 16). Others expressed concern about the influx of Iranians into Lebanon (Weiss, 1980). Shi'a "dignitaries," a code name for mukhtars and local clerics, joined tens of representatives of other Southern Lebanese communities to thank Israel for "freeing them from the terrorists," expressing support for strengthening the ties between Israel and Lebanon (Avidan, 1982). Well into the SLA's establishment, a Shi'a recruiter for the SLA from the village of Taybeh stated, "We are Lebanese before we are Shi'a. If someone from the North threatens us, we will fight back. This unifies all of us who live in the Security Belt. We will not hesitate to retaliate against any aggressor, even Shi'a" (Walter, 1987b, p. 16).

Notwithstanding the sentiments expressed in the last statement, the IDF recognized the significance of religion to the Shi'a in the South. Consequently, the IDF sought to advance the group identity fostered by joining the pro-Israel forces and incorporating religious elements. The National Guard units were given names such as the Forces of Karbala or Sons of the Cedars, emphasizing their religious and local identity (Blanford, 2011, p. 36). In 1985, the IDF launched a radio station, the Voice of the South (*Kol ha-Darom*). Modeled after a similar station that addressed Christian audiences, the Voice of Hope, the Voice of the South addressed Shi'a listeners, using religious themes to shape a "moderate" Shi'a identity, which is not "Khomeinist or radical" (Rahat, 1985, p. 20). In addition, during the occupation, Israel allowed SLA fighters and their relatives from the Security Belt to make a pilgrimage to the Nabi Yusha tomb, a Shi'a holy site in the Upper Galilee that other Lebanese have been denied access to since 1948 (Kidron & Sindawi, 2018, p. 336). Such acts helped the defectors develop a sense of local Shi'a identity and thus settle the dilemma they faced collaborating with Israel against other Muslims.

The incorporation of religious and traditional elements into the identity advancement efforts led by the IDF officers relied on the mediation of local agents. SLA officers, the sons of the South who were familiar with local practices, served as intermediaries with the local population. On the path to the SLA's formation, Major Haddad toured Shi'a villages, building up a sense of Southern identity. While attending a Shi'a religious festival, Haddad

reportedly declared that “Shi’a and Christians are now brothers in arms. The purpose is to remove foreigners, Syrians, and Palestinians, from Lebanon” (Rahat, 1979, p. 15). In so doing, Haddad built the role of Israel as bringing together these different communities. Other mediators were village mukhtars and zu’ama’ families. Traditionally the point of contact between the authorities and the local population, they facilitated the Israeli recruitment of local militiamen in local meetings and gatherings (Smit, 2000). Even Shi’a clerics served this process on occasions. Again, linked with the Israeli understanding of the centrality of religion, the Israeli recruiters and their partners, Haddad and Lahad, were able to meet to persuade local religious leaders to emphasize the connection between Shi’ism and local patriotism.² Some clerics indeed joined the efforts and exacerbated these local patriotic sentiments by calling “for Shi’a unity in Lebanon and [condemning] Iran's Shi’a leader Ayatollah Khomeini's decision... to ship a thousand Iranian fighters to South Lebanon to fight along with the [PLO] terrorists” (Rahat, 1979, p. 15). Following the establishment of the SLA, mukhtars and other dignitaries assumed the positions of intermediaries on the IDF's behalf, particularly in villages and towns that supplied many SLA fighters, such as al-’Udaissah (Walter, 1987b).

Organizing early defectors into fighting forces can help foster a sense of group identity that helps these defectors rationalize their acts and paves the way for further defection. From the onset, recruiting Shi’a to Israel's side seemed a tremendous challenge. Resources and salaries remained meager, and the pressure from other Shi’a, especially Hezbollah, occasionally drove Shi’a fighters to desert the SLA (Walter, 1987a). However, the projection of power and the provision of artifacts already at an early stage created momentum for recruitment. As one witness described, the handing of weapons drove Shi’a youth to the Israeli-backed forces because they hoped “to gain weapons and benefit from the status and respect that come with it, especially for those backed by a mighty force, such as the IDF” (Spiegel, 1984a, p. 19). Beydoun (1992) noted that:

In addition to economic factors, considerations relating to power or influence within the village affected the SLA recruitment drive. If a clan was induced to allow one or more of its members to join the SLA, rival clans would feel threatened and stripped of protection. Given the delicate local political and inter-clanic balances, it was enough for a few members of one clan to join the SLA for other clans to encourage a few elements of their own to join as well. (p. 45)

As the SLA proved resilient amid its rivals, it became more appealing to Shi’a recruits. If throughout much of the 1980s, the proportion of Shi’a SLA recruits stood at 20–30%, by the late 1980s and throughout the 1990s, reports indicated that it climbed to about 50%, mainly among the rank and file (Avneri, 1989, p. 19; Hirst, 1999). This defection, militia recruitment, and identity leadership cycle was broken only with Israel's withdrawal from Lebanon in May 2000.

CONCLUSION

By identifying the defection, militia recruitment, and identity leadership process, this article resurfaces the overlooked fact that defection and collaboration with the enemy are political and social phenomena. As such, it necessitates looking into the social, ideational, and psychological considerations guiding the defectors. This article has taken a step in this

²Videos of Haddad and Lahad touring the villages and meeting local mukhtars and religious leaders are available on a website for former SLA fighters residing in Israel (Southlebanonarmy.com).

direction by offering a model that indicates the role of social identity in the process of defection and how incumbents can utilize this element, which is inseparable from any collective action, to secure a tactical move of securing the support of former rebels or members of their communities.

Consequently, the case of Israel serves as a helpful plausibility probe that paves the way for further research, with various case studies whose exploration can add new variables for defection. An interesting dimension of identity entrepreneurship and prototypicality, which the social identity literature recently identified, is the existence of *identity mediators*. As prototypicality does not necessarily mean a “maximal similarity” between the leader and the group members or the “averageness” of the leaders among the group, but rather an ideal image (Steffens et al., 2014; Turner, 2005), group members may need intermediaries to “translate” the leaders' message. Works have pointed out mediators as group members with seniority or influence who have also built connections with the leaders/entrepreneurs. Through these relations, mediators have the legitimacy to “translate” the entrepreneurs' messages and ideas to potential defectors. By doing so, these mediators help the leader to shape the group's identity, while at the same time, they facilitate the construction of the leader and their prototypicality and also strengthen their position (Choi et al., 2022; Gleibs et al., 2018; Turner, 2005). The empirical analysis highlighted the role of intermediaries such as the SLA officers, local mukhtars, and religious leaders. The article's space limitations and the focus on probing the validity of a social identity approach to ethnic defection prevented exploring this theme further. Nevertheless, future studies may use this and similar experiences to develop the concept of identity mediators and their roles in ethnic defection.

Further questions also emerge from the hypothesis explored in this article: Are socially heterogeneous rebel constituencies more prone to ethnic defection? Are there certain governments or incumbents more equipped to use such tactics of identity entrepreneurship? Can insurgents develop mechanisms to undermine the militia recruitment factor as an enabler of ethnic defection? Answering these questions could provide more insights into the growing participation of armed groups in conflicts in multiethnic and multicultural societies and shed new light on these conflicts' social and political impact.

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