

Was Colonel David Marcus the First I.D.F. Major-General and how He came to be in Palestine

By Yael Shamir-Driver

In recent years, several articles have appeared in various publications about the American Jewish Colonel David Daniel Marcus, more commonly known in Israel as Major-General (Aluf) David Marcus or by his nom de guerre – Mickey Stone. Tragically, Marcus was accidentally killed by friendly fire on June 11, 1948, near Jerusalem.¹

This article aims to provide both clarifications of and insight into various aspects relating not only to the story of Marcus' recruitment to help the fledgling I.D.F. (Israeli Defence Forces) but also to his "crowning" as the first I.D.F. Major-General. The article has been written based on many historical documents accessible to the public, some of which were provided by my late father, Major-General Shlomo Shamir. Shamir, who was responsible for recruiting Marcus and bringing him to Palestine in February 1948, maintained continuous close contact with Marcus until his untimely death in June 1948 and was perhaps closer to Marcus than anyone else in Palestine/Israel during that period.² Other documents on which this article has relied, include documents, diaries and personal correspondence, which are still retained in my father's private archive.

Indirectly, the article also aims to document and thereby encourage respect for and adherence to historical facts.

The Background to Marcus' Arrival in Palestine in February 1948

After his release from the British Army³ in July 1946, Shamir (then Rabinowicz) was sent to replace Ya'akov Dori (later Israel's first Chief of Staff) as Head of the Haganah mission in the United States. On August 13, 1946, Shamir applied to the American Consul General in Jerusalem for a 1-year visa to the United States under the umbrella of being a Jewish Agency employee. On December 5, 1946, after almost four months of further correspondence and an interview at the consulate in Jerusalem,⁴ Shamir with his family arrived in New York City.

Almost a year later, in early October 1947, Shamir was summoned back to Palestine by Ben-Gurion for consultation regarding the recruitment of an American military expert to act as adviser to the fledgling Israeli army.⁵ More specifically, Ben-Gurion wanted to find a General (not necessarily Jewish) with extensive experience in both field and staff positions. Shamir arrived in Palestine for this consultation on October 21, 1947.⁶

¹ Report by the Commission of Inquiry into the circumstances of the fall of Col. Marcus (I.D.F. Archives, File 82-1171/2024. In Hebrew).

² A Letter from Marcus' wife to Shamir dated August 25, 1949 (Shamir's archive).

³ Shamir's service in the infantry (1940-46) led to his nomination as the clandestine Commander of the Jewish Brigade on behalf of the Haganah and the Jewish Institutions in Palestine.

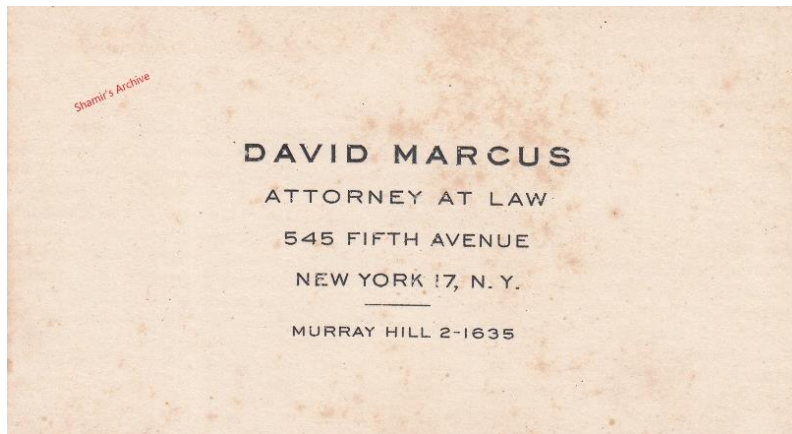
⁴ A collection of documents relating to the process of the application for visa, including the signed visa with the date of entry into the United States. (Shamir's archive).

⁵ The instruction read: "*Can you send us a General with a broad military education and war experience to advise us?*" The instruction is also mentioned in Ben-Gurion's diary of October 3, 1947: "*I gave orders to America . . . to find an adviser of high level (of education and Experience . . .)*" (Ben-Gurion Archives, Shabtai Tevet Collection, Personalities Subdivision, Marcus File, page 9). Both instructions translated from Hebrew.

⁶ Shamir's flight route from New York City to Palestine, via Portugal and Italy, is documented in Shamir's postcards to his wife who had stayed in the United States. It is also documented in a telegram dated October 21, 1947, that Shamir sent from Palestine to his wife. (Shamir's archive).

Due to a cholera epidemic in Egypt at the time,⁷ Shamir's return to the United States was delayed, and he did not return to New York City until November 5, 1947.⁸

Upon his return, Shamir consulted with several people, including Moshe Sharett, the then Head of the Jewish Agency's Political Department, who was stationed in New York City. In turn, Sharett consulted with various local contacts, including the Jewish-American jurist Murray Gurfein (1907-1979). Gurfein suggested involving Marcus in the search for a suitable American General. [Gurfein, who in November 1945 had served as a deputy to the American prosecutors at the Nuremberg Trials, knew Marcus, who had also been involved in those trials]. Marcus, who had been released from the United States Army in early 1947, was practising as an attorney at law from his office on 545 Fifth Avenue in New York City.



Shamir's first meeting with Marcus took place sometime between November 7 and 10, 1947, over lunch in the restaurant of the Berkshire Hotel in New York City, where Moshe Sharett was staying with his family. Four people attended the lunch: Sharett, Shamir, Gurfein and Marcus.⁹

After this meeting, Shamir had long conversations with Marcus, based on which he became familiar with his career trajectory in the United States Army. He also got to know Marcus' wife (Emma), visited the couple's home at Westminster Road in Brooklyn, and met some of the couple's relatives, thereby deepening his acquaintance with Marcus. In parallel Shamir and Marcus began the work to identify an appropriate General.

Within days Shamir and Marcus reviewed a list of 24 candidates for the position that Ben-Gurion was looking to fill.¹⁰ The list was apparently put together largely by members of the Haganah mission in the United States. Five preferred candidates were initially selected from this list, but after further examination, this number was reduced to two, with Major-General Ralph Corbett Smith the only practical candidate. (The second candidate, General Harry Collins, was in Australia at the time).

On November 12, Marcus telephoned Major-General Smith suggesting that he come over to New York City to meet Shamir.¹¹ After receiving the United States Army approval for Major-General Smith's employment as an advisor to the Jewish Agency and making the necessary arrangements, Shamir and Marcus flew to San Francisco and spent a day with Smith. Shamir was impressed with Smith and on December 3, a draft letter to Smith was prepared, stating that he was being offered a position by the Jewish Agency as an advisor to the army of the anticipated Jewish State at a salary of \$1,000 a month. It was also stated that a senior officer

⁷ Frequent reporting in the Ha'Aretz newspaper during October and November 1947.

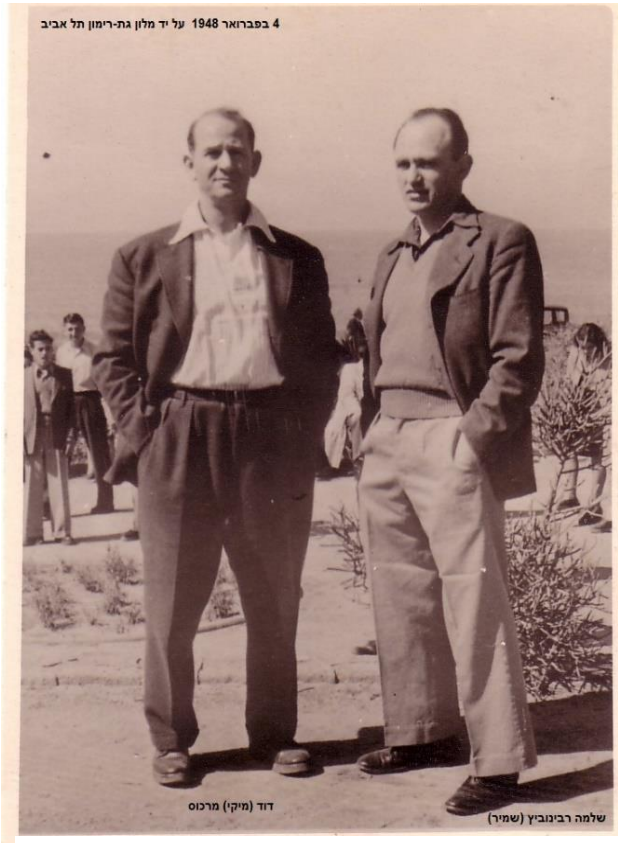
⁸ Shamir's return route from Palestine to New York City, via Paris and Shannon (Ireland), is documented in Shamir's postcards to his wife in the United States. (Shamir's archive).

⁹ Moshe Sharett's letter of November 26, 1962, to Marcus' wife (Shamir's archives).

¹⁰ Of the 24 candidates, the five most prominent candidates, initially marked in order of preference were Lt. Gen. William Hood Simpson, Gen. Ernest Harmon, Gen. Robert Richardson, Gen. Harry Collins and Maj. Gen. Smith. (Shamir's archive).

¹¹ Marcus' initial note to Maj. Gen. Smith, November 13, 1947. (Ben-Gurion Archives, Shabtai Tevet Collection, Marcus File, page 10).

would be appointed as an assistant to the advisor at a salary of \$600 a month.¹² For this position Shamir considered Marcus to be an ideal candidate. However, after receiving the United States government approval for Major-General Smith's employment as an advisor, it became clear that Smith could not accept the offer for fear of losing his army pension rights [Marcus had no such rights].



Shamir and Marcus – February 4, 1948, Tel Aviv
(Photographic rights – Shamir)

At that time (November 1947), feverish discussions were taking place at the United Nations regarding the future of Palestine, with various proposals on the table ahead of the adoption of the United Nations General Assembly Resolution on the Partition of Palestine (November 29, 1947).

On January 13, 1948, Ben-Gurion called on Shamir to return urgently to Palestine to join the team tasked with establishing the I.D.F. Teddy Kollek took over Shamir's position as Head of the Haganah mission in the United States.¹³

Having yet to secure an American General as an adviser, Shamir decided (sometime between January 14 and 19) to approach Marcus with an offer to join him on an introductory visit to Israel.

Shamir and Marcus left New York on January 30, 1948, and arrived in Tel Aviv via Paris on February 3.¹⁴ Shamir later wrote that during the flight, when he asked Marcus why he had agreed to come along, Marcus had replied:

*"Because I have Abraham's blood in my veins."*¹⁵ The day after they arrived in Tel Aviv, they were photographed standing together on the beach, not far from the Gat-Rimon Hotel, where Marcus was staying.

What was behind Ben-Gurion's Search for a Foreign Military Adviser?

As part of the background to Marcus' arrival in Israel, it is most important to understand that it was Ben-Gurion alone – and no one else – who decided that senior American officers with extensive military expertise were needed to help build a regular army.

¹² Draft proposal to Maj. Gen. Smith (both in print and in Marcus's handwriting) dated December 3, 1947. (Ben-Gurion Archives, Shabtai Tevet Collection, Marcus File, pages 13, 14). Information received recently, following research by author S. Ossad, suggests that Marcus apparently received a salary of \$750 per month.

¹³ Ben-Gurion's telegram of January 13, 1948, calling on Shamir to return and pass the baton to Teddy Kollek (1911-2007) – Later Mayor of Jerusalem. (Shamir's archive).

¹⁴ Ben-Gurion Diary, February 3, 1948, (Ben-Gurion Archives, Shabtai Tevet Collection, Marcus File, page 22).

¹⁵ Shamir's letter dated February 28, 1961 in reply to Ted Berkman's questions in his letter to Shamir of December 20, 1960. At the time Berkman was writing Marcus' biography – **"Cast A Giant Shadow"**. (Shamir's archive).

Unlike Ben-Gurion, many members of the Haganah, who had not served in foreign armies and had remained in Palestine during World War II, not only did not understand the importance of the structure and procedures required to operate a regular army but also refused in many cases, at least prior to 1948, to internalize basic concepts that characterize such an army. The Palmach's dismissive attitude towards military discipline and formal procedures is common knowledge. Consequently, on the eve of Israel's War of Independence, the principle of "unity of command", one of the most basic characteristics of a regular army, was far from agreed upon by many of those leading the Yishuv's defence activities, who had no experience serving in a regular army.

It was the clash between these two main cultures within the fledgling I.D.F. leadership and its consequential threat to the survival of the young state that led Ben-Gurion to seek external military expertise and authority. Such authority was needed to ensure across-the-board recognition and acceptance of formal structures and procedures, necessary to operate a regular army. Of these, the first step was to secure recognition and acceptance of a single ultimate authority of command.

Given Ben-Gurion's position, his "releasing" of Israel Galili (1911-1986) from his official position as Head of the Haganah organization and his replacing of Palmach member Zvi Zamir (1925-2024), at the time Commander of the 73 Battalion of the 7th Brigade, with Haim Laskov (1911-1982), a veteran of the British Army and later I.D.F.'s 5th Chief of Staff, are no coincidence.¹⁶

Marcus during the First Two Months of his Time in Palestine – The First Period

The first three weeks of Marcus' time in Israel were devoted to field visits to the various fronts. These visits, mainly with Shamir, had ended by March 2, 1948.

On March 7, in light of his impressions, Marcus began to prepare materials for training courses for I.D.F. senior personnel – both battalion commanders and staff officers. For this purpose, United States Army manuals, which Marcus had brought with him, were of great help (see Appendix-A for examples). From these manuals, Marcus copied, cut and amended what was needed for such courses. As instructors for these courses, Marcus suggested Shamir (Rabinowicz), Ephraim Ben-Artzi, Monty Green, Fritz Eshet and Chaim Herzog,¹⁷ all of whom, unsurprisingly, had served and accumulated considerable experience in the British Army.

In addition to the manuals, Marcus came with years of experience in the United States Army. He was credited with 12 years of active service and up to 6 years as an active reservist. Importantly, this extensive service was also multifaceted and included both field experience and staff work. His acquaintances at the highest levels of the United States Army were also helpful to him, and not only in preparing the study material.

On March 16, 1948, senior members of the "fledgling I.D.F." gathered to hear of Marcus' initial impressions. Marcus spoke of the need for unity of command, emphasizing the need for an unequivocal response to the question "who is responsible here and with what authority" (i.e., ensuring that not "every Platoon Commander is a General"). He also talked about the need for an effective headquarters and administration and the necessary shift in emphasis

¹⁶ An added objection to the use of foreign military expertise was demonstrated by Y. Ben-Aharon's reaction (this time on grounds of political neutrality) to Ben-Gurion's initiative to seek advice from another senior American officer, namely Fred Harris (real name: Friedrich Gronich). (Ben-Gurion Archives, Shabtai Tevet Collection, Marcus File, pages 60-62).

¹⁷ Ben-Gurion Diary, March 2, 1948. (Ben-Gurion Archives, Shabtai Tevet Collection, Marcus File, page 23).

from an organization structured for defence to one designed for attack. In addition, he commented on the need for planning, improving the soldiers' physical fitness, securing a reserve of manpower and procuring the basic personal equipment that was missing.¹⁸

On March 28 or 29, 1948, following the pleas of his wife Emma, Marcus left Palestine for a brief spell back in the United States. Apparently, it was clear to Marcus that after this short break, he would return to Palestine to assist as much as he could. En route to the United States, his flight suffered a delay of some three days in Geneva – a not uncommon occurrence in those days.¹⁹ While in the United States and during the Passover festivities (April 23 – 30), Marcus and his wife were hosted by Moshe Sharett for a luncheon. In a letter to Sharett dated July 4, 1948, Marcus' wife (by now widowed) mentioned this kind gesture.²⁰ Marcus arrived back in Palestine around May 9.

Marcus and the Breakthrough to Jerusalem – The Second Period

After his return to Palestine, Marcus pitched in immediately to the preparatory activities for what came to be known as Israel's War of Independence.

On May 10, five days before the declaration of Israel's independence as a sovereign state, he met with Ben-Gurion, on May 21, he visited the Negev Front, and on May 28, Ben-Gurion appointed him "Supreme Commander of the Jerusalem Front" – an appointment that tragically turned out to be pertinent for only two weeks (see discussion below). The critical importance of securing control over Jerusalem and ensuring its recognition as the capital of the State of Israel was summed up by Ben-Gurion in his instruction "*...No Matter What – To Jerusalem*".

The effort to secure control over Jerusalem, which was under siege, began with the unsuccessful battles of Latrun and ended with the lifting of the siege and the liberation of Jerusalem by the I.D.F. 7th Brigade on June 11, 1948 – the day the armistice agreement was signed. Historically, attempts have been made – and indeed continue to be made – to credit Marcus with commanding the campaign to lift the siege on Jerusalem by planning and executing the opening Route 7 (also known as the Burma Road) – an event that changed the face of the War of Independence.

However, as Shamir testified in his original book under the literally translated titled: "*... No Matter What – To Jerusalem*"²¹: "*Marcus was not present and did not participate in the reconnaissance survey following the end of the attack [the 2nd Latrun battle] to determine the general course for the Burma Road. Neither did he take part in deciding on the specific track defined by the 7th Brigade, nor in the preparations for its establishment that began immediately after the attack. Although he followed the development of the actual work, he was preoccupied with preparations for "Operation Yoram", the objective of which was to take over the Latrun ridge in which the Palmach brigades – Har'el and Yiftach – were supposed to take part. Marcus' plea [rather than order] to Yigal Alon [Palmach's leader] to execute the Yoram battle plan was not enacted: the attack was postponed from one day to the next, until it finally took place – and not according to the original battle plan – on Wednesday, June 9*".²²

¹⁸ Full text of Marcus's lecture on March 16, 1948. (Shamir's archive).

¹⁹ Postcards bearing the dates April 2 and 6, 1948, sent to Shamir by Marcus from Switzerland on his way to the United States. (Shamir's archive).

²⁰ Letter dated July 4, 1948, from Marcus's widow to Moshe Sharett, thanking him for lunch during the Passover holiday in April 1948 (Shamir's archive).

²¹ Book published by Ma'Arachot, Ministry of Defence 1994, in Hebrew. (See, page 402).

²² "Operation Yoram" was unsuccessful.

In other words, Marcus, who could not communicate in, nor understand Hebrew, and to whom Alexander Broide was attached as a Hebrew-speaking secretary, did not participate in the planning of Route 7, nor in reality, was he in command over those responsible for its opening. The credit for Route 7 and the consequent lifting of the siege and liberation of Jerusalem is not his. Nor does it belong to the members of the Har'el Brigade who claimed all the plaudits at the time. In this context, it is most important to recognize and understand that Route 7 was **not** characterized by sections in which soldiers had to get out of their jeeps, carry their military gear and push vehicles over rocks and potholes – characteristics of a different track that was tested by members of the Har'el Brigade before the Route 7 breakthrough.

Further details about the breakthrough to Jerusalem can be read in chapters 14 and 16 of the original Hebrew version of Shamir's book ". . . **No Matter What – To Jerusalem**". Marcus' part in this saga is described on pages 399-406. In the abridged English version of Shamir's book entitled "**The Battle for Jerusalem – How the Siege was Lifted**", Marcus' role is described on pages 200 – 203.²³ All the facts lead to the conclusion that despite the title "Supreme Commander of the Jerusalem Front", Marcus served as an advisor rather than a commander.

Was Marcus "The First Major-General in the I.D.F."?

On August 16, 1949 (i.e. about 14 months after Marcus' death) the Hebrew press (Davar, Ha'Aretz, Ha'Boker, and Al Ha'Mishmar) published announcements to the effect that Commander Marcus had recently been awarded the rank of Major-General (see the announcement text in the Ha'Aretz in Appendix-B). The announcements stated that the award of the rank was confirmed in a General Staff Ordinance that had been issued shortly before the publication of the press releases i.e. shortly before August 16, 1949. The Yizkor website of the Israeli Ministry of Defence also confirms that the rank of Major-General was awarded to Marcus posthumously i.e. after his death on June 11, 1948.

Although Marcus was appointed by Ben-Gurion as "Supreme Commander of the Jerusalem Front" on May 28, 1948, it should be remembered that as of that date, no formal ranks had yet been introduced in the I.D.F. The ranks were apparently determined by Ben-Gurion only on June 13, 1948. (see Appendix-C, presenting a diary excerpt for this date taken from Ben-Gurion's two-volume book "**The Renewed State of Israel**", published by Am Oved, 1969). Indeed, the structure of the ranks of officers in the I.D.F., which was similar (but not identical) to that which exists today, was only officially confirmed in the General Staff Ordinance No. 7 of July 21, 1948, (clause 20).

In I.D.F. General Staff Ordinance No. 10 of August 11, 1948, Ya'akov Dori was appointed Chief of Staff with the rank of Lt. Gen. Appendix No. 1 to this Ordinance lists the first I.D.F. officers who received the rank of Major-General. The ranks came into effect on August 1, 1948. (see Appendix-D).

To the list of Major-Generals in Appendix-D, one must add Avner Elimelech, whose rank was confirmed in I.D.F. General Staff Ordinance No. 13, and Monty Green (Mark Montague Green), whose rank was confirmed in I.D.F. General Staff Ordinance No. 16. [Ephraim Ben-Artzi received the rank of Major-General on October 1, 1948, as published in I.D.F. General Staff Ordinance No. 24.] Marcus's name does not appear in Appendix-D nor any later I.D.F. General Staff Ordinances before and including Ordinance No. 50 of May 1949.

It is also important to understand that although Marcus was appointed "Supreme Commander of the Jerusalem Front" on May 28, 1948, as an American citizen and an officer in the United States Army, he was forbidden to swear allegiance to another flag and officially serve in any

²³ "**The Battle for Jerusalem – How the Siege was lifted**", Posner & Sons Ltd., 2001.

foreign army. In other words, Marcus was not allowed to receive any official I.D.F. rank, which explains why he was granted the official rank of Major-General only after his death.

All of the above supports the notion that granting Marcus the rank of Major-General in May 1948 was a declarative and symbolic act on the part of Ben-Gurion. It was Ben-Gurion who took action and put into effect the concepts of the "Unity of Command" and the imposition of authority on local commanders, for whom regular army arrangements (based mainly on British practice) were alien and unacceptable. Ben-Gurion achieved this by using a "professional figure accepted as "neutral" i.e. not from the British military school.²⁴ It is most likely that the granting of this rank to Marcus accelerated the acceptance of the principle of the "Unity of Command", a principle Marcus had emphasized in his very first lecture to the future I.D.F. command staff on March 16, 1948.

In conclusion, there is nothing wrong with viewing Marcus as "the I.D.F's first Major-General" but it is important to be aware of what lay behind his appointment and what it meant in practice.

100 Days and the Contribution to the Fledgling I.D.F

Given that Shamir was perhaps the person closest to Marcus during the latter's time in Palestine/Israel, a summary of his views of Marcus' contribution during his association with the nascent I.D.F. seems appropriate.

Shamir's views below were expressed not only in his undated transcription of an interview with an unnamed female interviewer (most probably Zipporah Porat (nee Borowsky), who in 1949 was a young journalist charged with writing about Marcus,²⁵ while working with I.D.F.'s Publication Department – Ma'Arachot), but also in his previously referenced letter of February 28, 1961 to Ted Berkman.

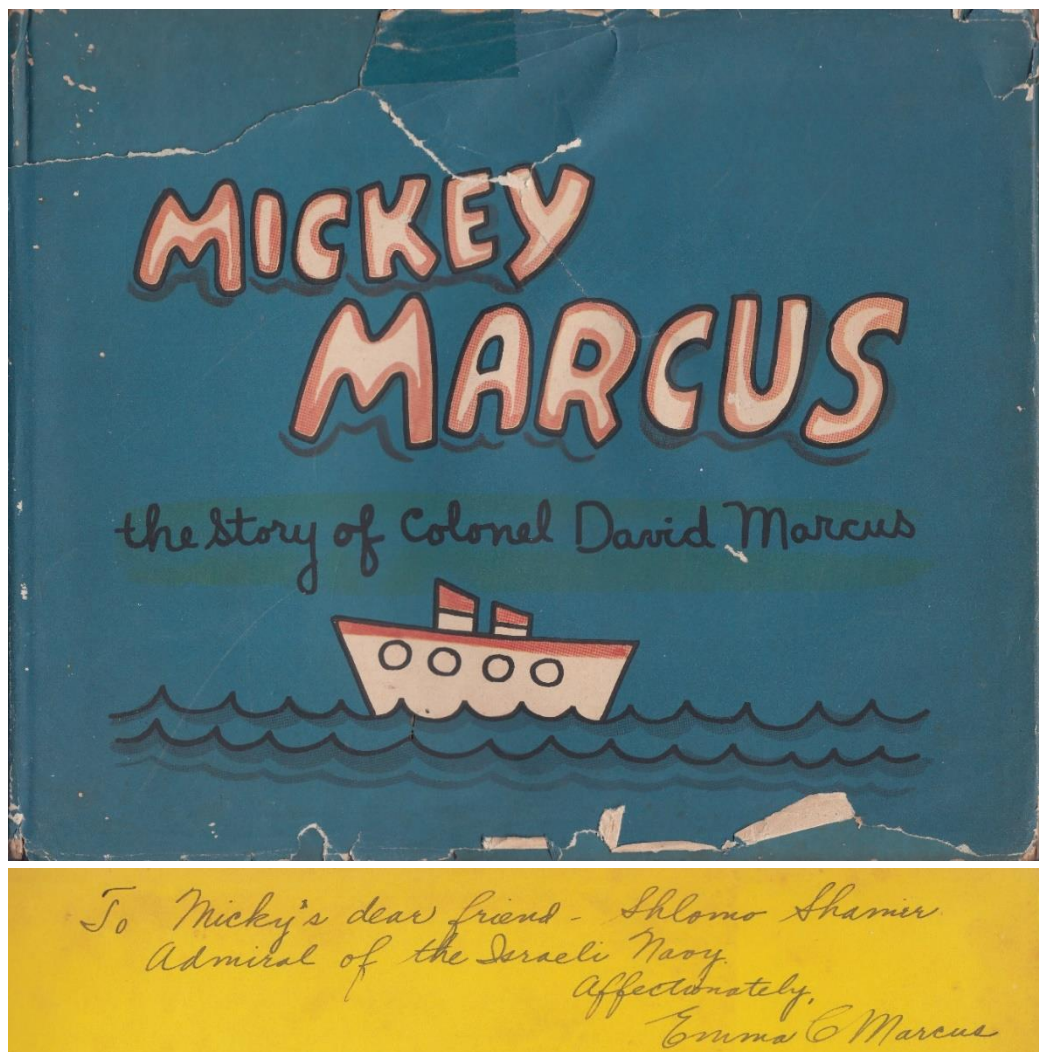
1. Shamir argued that Marcus had an exceptional ability to identify and empathize. When Marcus was present, one felt he was squarely on one's side. This ability radiated from him and resulted in the breakdown of the potential barriers typically linked to dealing with a foreigner. *"The symbolism of his arrival – a relatively senior American officer with a lively countenance, who arrived to help us at our most critical hour, was a feature that captivated us and encouraged the feeling that he was one of us."*

Shamir expressed the same idea in his letter to Ted Berkman: *"Marcus' most important military contribution was the inspiration he created, both directly and indirectly. The source of this inspiration was his ability to identify and empathize with our goal. This ability is the most significant trait of a military leader who finds himself amid a foreign army. It created wonders without the need for too many words. Although not a quantifiable trait, it helped generate significant strength. Marcus' inspiration was created not by fiery speeches but by wordless messages from a smiling, storytelling, joking with half-closed eyes person with an open and cordial face, features which inspire an immediate human connection. At the same time, he was introverted, brave, modest, honest, physically strong and very fit and to top it all with the status of a volunteer".*

²⁴ It is interesting to note that over the years, many Palmach members have adopted Marcus as their friend and accepted authority. This was not the case during Marcus' time in Palestine/Israel, when there were widespread reservations about his appearance in the field, as there were about the appearance of other officers of a foreign army advocating the teachings of such an army.

²⁵ Zipporah Porath's book *"Colonel David (Mickey) Marcus – A Soldier for all Humanity"*, Published in 2010.

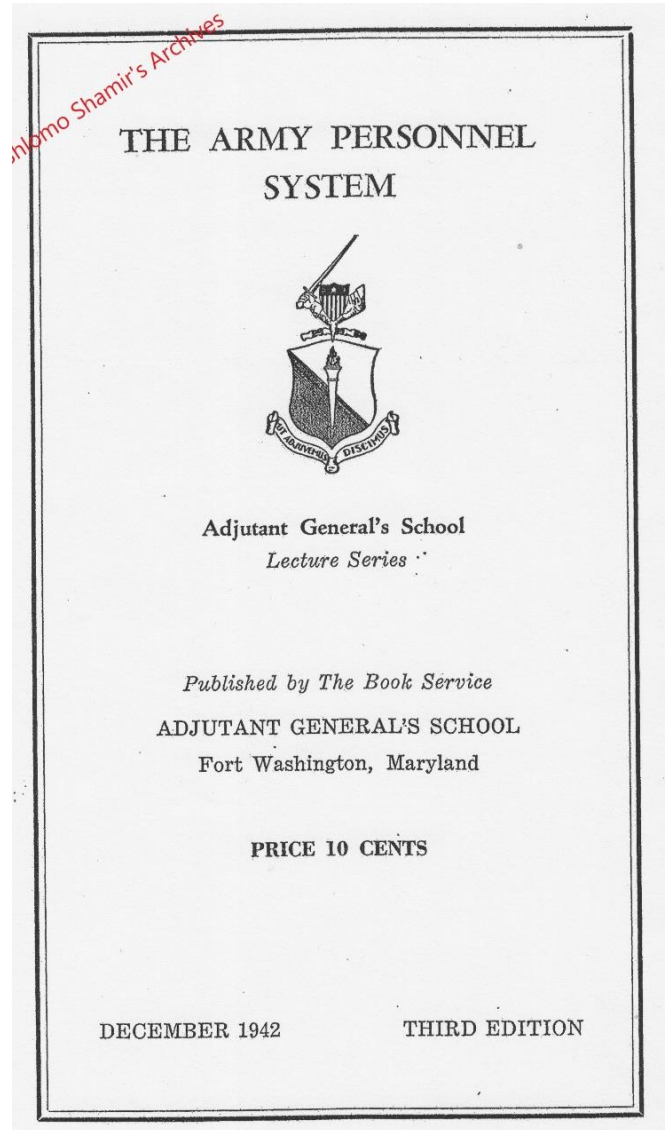
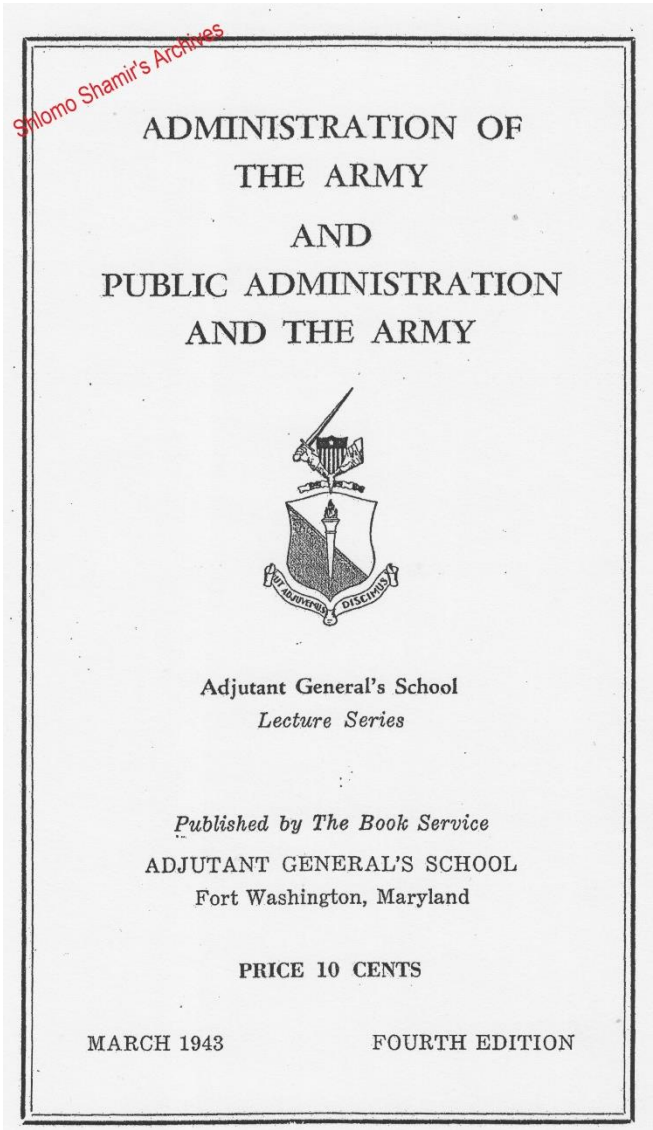
2. Shamir also argued that Marcus knew and was experienced in the most basic military activities. His experience dealing with American military leadership did not impair his ability to hold, lift, roll, and aim a rifle well. The ability to demonstrate, and thus put the theory into practice, is very basic and important in military life. It enabled Marcus to establish a common denominator with the local military personnel at each level, adjusted to their respective language.
3. Shamir further mentioned the clarity of Marcus's military thinking: This clarity made a great impression on Ben-Gurion. When Marcus examined the command structure of the General Staff, he was struck by its lack of clarity. It was unclear who was in charge of what and of whom. In Marcus' eyes, this was a matter of utmost importance, an issue that he impressed and emphasized from morning to night.
4. Finally, Shamir noted the value of Marcus' contribution to the I.D.F. training modules by pointing out that the initial training material [for commanders' courses] that Marcus left behind formed the training basis for generations of I.D.F. commanders.



A Children's book illustrated by pupils of Erasmus Hall High School, Brooklyn, New York City, published in 1949 by Bloch Publishing Co. Inc. and dedicated to Shamir by Marcus' widow – Emma.

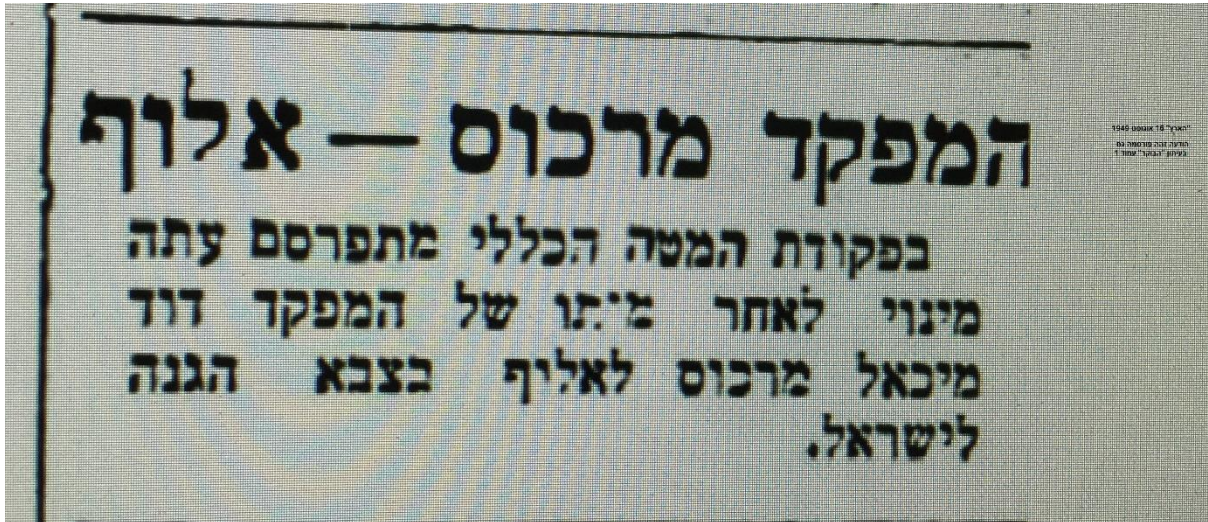
Appendix-A

Examples of US Army Material that Marcus brought with him



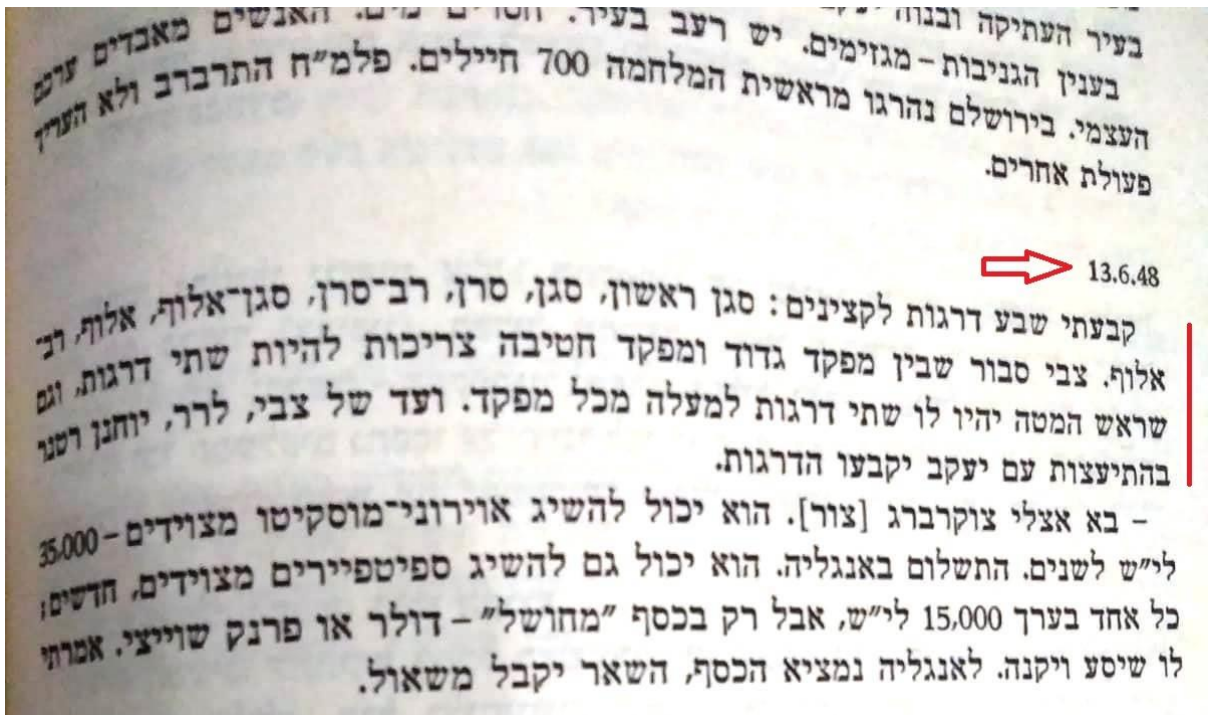
Appendix-B

An Announcement in the Ha'Aretz Newspaper of August 16, 1949



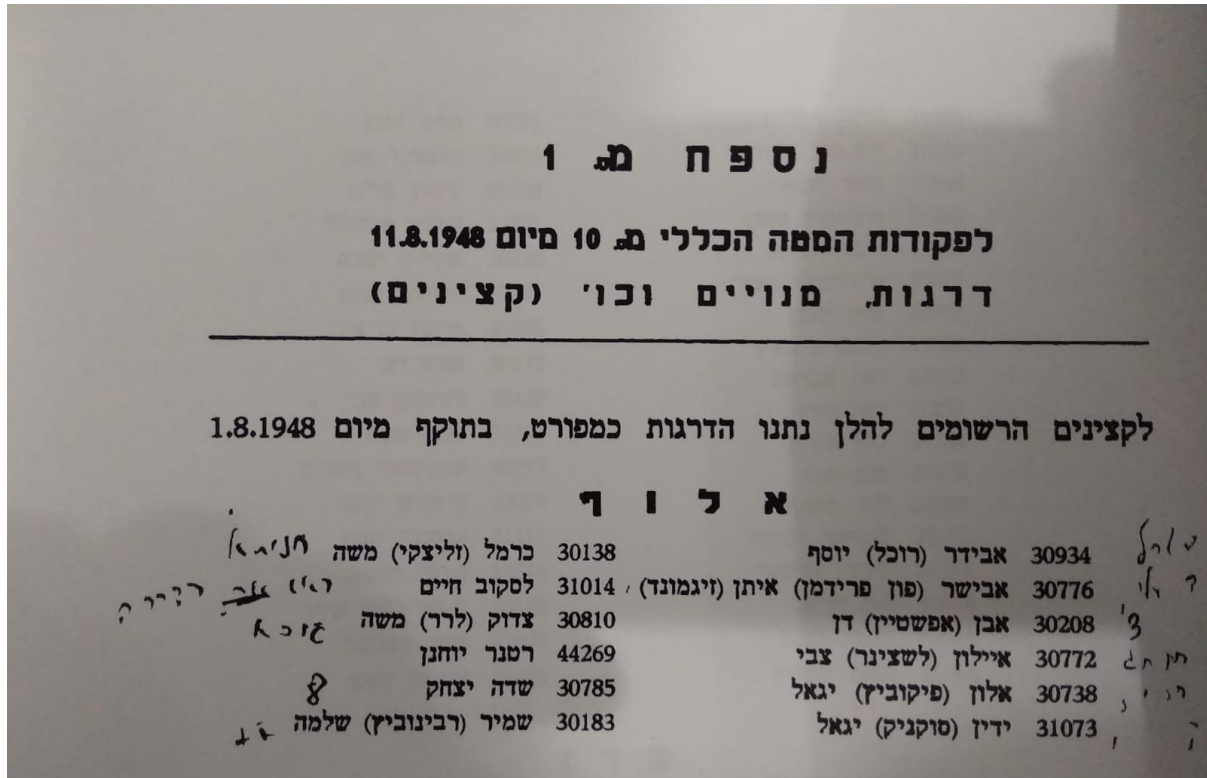
Appendix-C

From Ben-Gurion's Book "The Renewed State of Israel" (1969)



Appendix-D

Appendix-1 to I.D.F's General Staff Ordinance No. 10 of August 11, 1948 Ranks, Appointments etc. (officers)



The following officers were awarded the following ranks, in effect from August 1, 1948

Major-General [Hebrew alphabetical order]

Avidar (Rochel) Yosef, Avisar (Von Friedman) Eitan (Siegmond), Even (Epstein) Dan, Ayalon (Lashchiner) Tzvi, Alon (Peikowitz) Yigal, Carmel (Zalitzki) Moshe, Laskov Haim, Zadok (Lerrer) Moshe, Ratner Yohannan, Sadeh Yitzchak, Shamir (Rabinowicz) Shlomo.