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Socialization and violence: Introduction and framework

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Abstract

This article sets the stage for a special issue exploring group-level dynamics and their role in producing violence. My analytic focus is socialization, or the process through which actors adopt the norms and rules of a given community. I argue that it is key to understanding violence in many settings, including civil war, national militaries, post-conflict societies and urban gangs. While socialization theory has a long history in the social sciences, I do not simply pull it off the shelf, but instead rethink core features of it. Operating in a theory-building mode and drawing upon insights from other disciplines, I highlight its layered and multiple nature, the role of instrumental calculation in it and several relevant mechanisms – from persuasion, to organized rituals, to sexual violence, to violent display. Equally important, I theorize instances where socialization is resisted, as well as the (varying) staying power of norms and practices in an individual who leaves the group. Empirically, the special issue explores the link between socialization and violence in paramilitary patrols in Guatemala; vigilantes in the Bosnian civil war; gangs in post-conflict Nicaragua; rebel groups in the Democratic Republic of Congo, El Salvador, Sierra Leone and Uganda; post-conflict peacekeepers; and the US and Israeli military. By documenting this link, we contribute to an emerging research program on group dynamics and conflict.

Keywords

armed group institutions, civil war, group dynamics, mechanisms, socialization, violence

Introduction

A disarmament, demobilization and reintegration (DDR) program offers jobs and schooling to former combatants, but it does not work, and in fact fuels a return to violence. New gang recruits with no prior record of violent behaviour come to use violence – a practice that often endures long after they leave the gang. A rebel group mistreats and sexually abuses civilian populations, despite evidence that such violence undercuts its broader strategic goals. Units of a national military deploy to the field, an environment radically different from boot camp; yet, soldiers retain the lessons of such training, in this case, the need for and use of lethal violence.

What is common to the subjects in these vignettes is membership in a group or community – one that may facilitate the learning of new practices or thinking in new ways. Explaining such group-level dynamics and their role in producing violent outcomes is the goal of this special issue. While conflict studies has embraced disaggregation down to the level of the armed group, we go a step further, exploring how interaction within the group may lead to the use of violence – or its rejection. I argue this is indispensable for understanding how militaries and other armed groups can and do change in conflict and post-conflict settings.

We capture this group-level phenomenon by theorizing in terms of socialization, or the process through which actors adopt the norms and rules of a given community. This means to think of soldiers, rebel combatants and gang members as embedded in social environments, which not only constrain and provide incentives to act, but also reshape interests and identities. Empirically, we explore the link between socialization and violence in paramilitary patrols in Guatemala;

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vigilantes in the Bosnian civil war; gangs in post-conflict Nicaragua; rebel groups in the Democratic Republic of Congo, El Salvador, Sierra Leone and Uganda; post-conflict peacekeepers; and the US and Israeli military.

The goal is to provide new insight on the production of organized violence. For national militaries, this means to understand better the conditions under which recruits who have been socialized to fight sometimes fail to do so, or how highly trained soldiers come to use violence in ways their training is meant to prohibit. For non-state groups, it means to shed new light on central questions in civil war studies – from the nature and extent of rebel group cohesion to variation in repertoires of violence; it also means to link conflict research to contemporary work on gangs – in particular, how violent norms are transmitted within them.

Ours is a theory-building effort, where we explore the relation of group processes and socialization to violence not by articulating and testing some general and generalizable theory, but by advancing well-specified arguments on how socialization does – or does not – work in various contexts. When building new theory, it is important not to foreclose possible arguments from the outset, which means we are neutral in terms of social theory. We privilege neither rationalist nor constructivist ontologies, and embrace different theories and assumptions about human action, from principal–agent models to the intersubjective creation of meaning and identity.

While socialization theory has a long history in the social sciences, the contributions in this special issue do not simply pull it off the shelf and apply it to conflict. Instead, we draw upon insights from several disciplines – sociology, political science, organizational theory – to rethink core features of it. Our analytic focus is on organizations that socialize to produce violence, and on the processes of socialization. We distinguish the intentional and strategic aspects of socialization from the spontaneous, less formal dynamics of group and cross-group interaction that also socialize. We explore norms and practices within the group as well as violence directed toward others. If the former are possible mechanisms of socialization, then the latter appear to be the outcome of it.

Finally, as socialization is essentially a story of conformity, there is an analytic danger of neglecting agency, which has been an enduring problem in the broader literature. To counter such bias, I theorize agency's role in three ways, capturing both formal, intentional socialization processes and a less appreciated informal kind.

This introductory article proceeds as follows. First, I review achievements and challenges in the literatures on civil conflicts and socialization. Then, I rethink and adapt theories of socialization to the study of violence – the essay's substantive core. This is partly a deductive exercise, responding to analytic gaps in the literature, but crucially it is also informed by our own findings – a so-called abductive research strategy (Josephson, 2000; Zuern & Checkel, 2005: 1046). Next, I address methodological issues and introduce the nine articles that comprise the remainder of the collection. The conclusion highlights future key challenges for theory and method.

Socialization and violence: State of the art

As the special issue is fundamentally grounded in the study of conflict and violence, I will highlight the group/organizational turn in this literature. Important for the socialization literature reviewed is its nature as both a process and an outcome.

Civil conflicts

Within the extensive research on civil war (Tarrow, 2007; Blattman & Miguel, 2010; Cederman, Gleditsch & Buhaug, 2013), my concern is the disaggregation embraced by political scientists beginning some ten years ago. As an improvement on earlier analysis using state-level, aggregate measures (Fearon & Laitin, 2003), many scholars developed disaggregated databases on sub-national actors and dynamics. Some disaggregated spatially, using so-called geo-referenced conflict data (Buhaug & Rød, 2006; Raleigh et al., 2010).

More important for my purposes are those who collected and coded data on the attributes of non-state actors (Cunningham, Gleditsch & Salehyan, 2006; Salehyan, 2009) and theorized at the group and cross-group levels (Bakke, Cunningham & Seymour, 2012). This permitted analysis of factors that enable collective action and which shape these groups' interactions with others. It also highlighted the empirical reality that rebel groups are not all alike and that they can and do change their practices and fighting capabilities over time, as well as their declared aims. As a result, we now have important data on conflict actors – their repertoires of violence, variation in the use of violence and nonviolent resistance (Raleigh, 2012; Chenoweth & Cunningham, 2013; Cohen & Nordås, 2014, 2015).

Yet, the emphasis in these datasets – structural, organizational or leadership features, or actions/events – could not unpack the social processes that cause change within rebel units and other conflict actors (Salehyan, Siroky & Wood, 2014). To be fair, such limitations were

not solely a function of (quantitative) methodological choice. Weinstein's (2007) important study of rebel strategy, which includes a rich qualitative component, also bracketed process and dynamics within the group – in his case, though, due to prior ontological (structure over agency) and theoretical (political economy) commitments (see also Tarrow, 2007: 591). One sees a similar limitation in other (qualitative) work that, while theorizing at the insurgent/group level, gives analytic priority to broader social networks and institutions (Staniland, 2012).

Two recent bodies of work that focused on dynamics inside armed groups set the stage for our own approach: civil war scholarship drawing on military sociology and organizational studies; and studies of violence in non-civil war settings. Regarding the former, Wood (2008) has argued that socialization is one of several 'social processes' neglected by students of civil war. Hoover Green (2011) investigated the role of ideology in rebel groups and Gutiérrez-Sanín & Wood (2014) went on to explore how it promoted socialization.

Perhaps the greatest interest in the violence/group/socialization nexus has come from those studying child soldiers (Gates & Reich, 2010; Blattman, 2012). This is not surprising, as a core finding from the classic socialization literature is that children are more susceptible than adults to socialization (Draper, 1974; Blattman, 2007). Gates and Vermeij, in particular, argue that we need to explore a range of mechanisms, such as teaching, learning, hazing and dehumanization, in child soldier socialization (Gates, 2011: 57–60, 2002: 111–116; Vermeij, 2011, 2014: Ch. 2).

Turning to literature in settings other than civil war, work on urban gangs offers important insights on the group-based production of violence. So-called street socialization clearly involves a mixture of violent and nonviolent processes (Vigil, 2003: 230, 235; see also Rodgers, 2017). For another, examination of initiation rites and identity-making practices of urban gangs (Stretesky & Pogrebin, 2007; Vigil, 2003; Rodgers & Hazen, 2014: 10; Utas, 2014) illuminates the connection between violent practices internal to the group and violence toward externals – which is precisely our concern.

Socialization

While the literature on socialization is vast (see Checkel, 2014a for a multidisciplinary review), most relevant here is sociologists' core theoretical contribution and political scientists' efforts to disaggregate causal processes and mechanisms.

When the concept of socialization was first invoked by sociologists in the 1950s, it was intended to address foundational issues (Brezinka, 1994: 9–10). How do groups arise? How is society possible? Dawson, Prewitt & Dawson (1977: 9, passim) built on these foundations to offer a definition of socialization as a process of inducting actors into the norms and rules of a given community, the endpoint of which is internalization. Socialization, in other words, is a process whose intended result is not simple behavioural adaptation, but a deeper change in an actor's sense of self (see also Long & Hadden, 1985: 42–44; Arnett, 1995: 618).

While this definition – which we adopt – is an excellent starting point, it did sow the seeds for a problem that has bedevilled subsequent work: the agency of the targets involved. Too often, they are construed as blank slates on which new values are inscribed. Yet, the empirical reality is that agents often resist attempts to socialize them; their agency may be attenuated (Rodgers, 2017), but it is not absent (Manekin, 2017; Wood & Toppelberg, 2017). This blind spot is possibly a legacy of the early focus on children (Draper, 1974).

In sociology, the most important work on socialization was done nearly half a century ago. Most relevant for our purposes is the literature on national militaries (Shils & Janowitz, 1948; Bartov, 1989).[1] These studies of the organizational factors promoting cohesion or breakdown within military units aimed to provide policy advice, not to advance theory or to explain socialization's role specifically in producing violence (Bachman, Sigelman & Diamond, 1987). Thus, one classic study of cohesion among the Viet Cong sought to inform US military actions (Davison & Zasloff, 1966).

The term socialization itself was not often used. Instead, the analytic focus was task and social cohesion (Kier, 1998; MacCoun & Hix, 2010), or related concepts like trust (Ben-Shalom, Lehrer & Ben-Ari, 2005) and communication (King, 2006). However, cohesion was typically defined in a very broad and process-oriented way that strongly suggests a role for socialization (Siebold, 2007: 288–289). Another feature of this work is that it said little about the agents or targets of socialization (Garrett & Baquedano-Lopez, 2002), but focused on the structure – say a military organization – producing conformity in an individual (Wamsley, 1972: 407; Winslow, 1999: 435).

[1] This glosses over important research on socialization within families and schools. See Parsons (1959) and Inkeles (1966).

Socialization research by political scientists has followed two strands. Since the early 1960s, work on so-called political socialization has been concerned with the transmission of political attitudes to young people (Searing, Schwartz & Lind, 1973; Cook, 1985: 1089; Torney-Purta, 2000: 88) and, rarely, to adults (Sigel, 1989). Like their colleagues in sociology, these researchers granted little agency to the targets of socialization; the assumption appears to be that attitudes and values take hold through exposure to a specific environment (Torney-Purta, 2000: 94; Cook, 1985). This echoes the proposition by social psychologists – now shown to be seriously underspecified if not simply untrue (Beyers, 2005) – that it is the amount of contact that drives identification with the group and thus socialization. This work also exhibited a mismatch between theory – capturing the internalization process for new norms and values – and method, which was overwhelmingly quantitative (Sigel, 1995: 20; see also Cook, 1985: 1090).

These are among the reasons for the decline in political socialization research pointed out by Cook (1985) in his stock-taking article (see also Sapiro, 2004: 4). He and others criticized researchers for treating the targets of socialization as infants unable to resist, and for eschewing the qualitative methods appropriate for measuring social interaction (Cook, 1985: 1088–1091; see also Niemi & Hepburn, 1995: 14; Sigel, 1995: 18–20). These problems remain largely unaddressed (Abendschoen, 2013).

Beginning in the mid-1990s, a different group of political scientists took up questions of socialization. These international relations (IR) scholars focused on how socialization occurs, drawing upon arguments about world society and culture developed in the English School (Finnemore, 1996: Ch. 1) and by sociologists (Meyer et al., 1997; Boli & Thomas, 1999). Their value added has been to highlight process (Price, 1998; Schimmelfennig, 2003; Johnston, 2001, 2008); to theorize in terms of causal mechanisms (Risse, Ropp & Sikkink, 1999, 2013; Gheciu, 2005; Checkel, 2007; Vermeij, 2014); to explore cases where socialization efforts fail (Checkel, 2003); and to theorize socialization targets, thereby giving them agency (Epstein, 2012; Adler-Nissen, 2014).

These theoretical advances in IR are limited, however, by an empirical focus on nonviolent interaction – for example, the roles of persuasion and learning. Are violent socialization mechanisms any different in their effects? Even the literature on military socialization focuses largely on boot camp experiences and non-combat life, as opposed to socialization occurring during combat or through violent group behaviour. Likewise, most research on urban gangs talks of street socialization as a process producing violence while not necessarily being violent itself (Vigil, 2003: 230).

The social production of violence

The literatures reviewed above provide an excellent starting point for understanding the social production of violence; yet, to explain more fully the process through which socialization occurs and how it facilitates violence, it is important to address gaps and weaknesses in this work. In the following, I therefore: (1) theorize socialization's layered and multiple nature, capturing the key role of multiple group contexts; (2) examine the role of strategic choice in socialization, alerting us to its calculative/individual aspects; (3) identify several relevant socialization mechanisms, both within and outside the group, thus better specifying the processes creating pro-group behaviour and attitudes; (4) theorize the agency of those inducted into a group, which can balance or counteract the effect of (group) structure; and (5) explore the (varying) persistence of the norms and practices learned in a group for an individual who leaves it.

Socialization as layered and multiple

An individual may be embedded in several different groups, in sequence or perhaps simultaneously. This observation goes beyond the distinction in the literature between primary and secondary socialization, which assumes a temporal ordering – from the family, to broader social institutions such as schools, professional associations or the military (Dawson, Prewitt & Dawson, 1977; Johnston, 2005).

To begin, targets of socialization efforts are never blank slates. Prior to group recruitment, they are situated in a local normative context that will likely shape socialization dynamics in the group. For example, socialization could be hindered in cases where local and group norms were in conflict (Wood, 2010; Wood & Toppelberg, 2017). Anthropological studies make a similar point when they talk of a cultural match – or lack thereof – between a socializer and his/her target (Checkel, 1999; see also Marks, 2014).

However, a neat temporal ordering breaks down in many of the cases studied here. Thus, a recruit to a rebel group may experience its socialization process at the same time as she is targeted for socialization by the international community – think of the long-running campaign to prevent recruitment of child soldiers (Achverina & Reich, 2009). How – through what mechanisms – do international efforts interact with socialization dynamics

within the group (Jo & Bryant, 2013)? Does one site trump another? Is the result hybrid socialization (Johnston, 2005: 1020)? Or, is one site more dominant, with individuals enacting behaviour appropriate to that particular setting (Rodgers, 2017; Fujii, 2017)?

Furthermore, the norms and values embedded in these multiple arenas may differ in important ways, diminishing the effect of socialization in any given group. Work on socialization and European identity reveals precisely this dynamic. Transnationalized political elites get socialized into an inclusive, tolerant European identity; at the same time, they are active in other national-based and much more robust socialization arenas promoting a less inclusive and less tolerant identity. The latter is minimizing the effects of the former (Checkel, 2014b; Favell, 2009).

Socialization and strategic choice

While socialization theory has had an uneasy relation to strategic action and rational choice, this is a false dichotomy. From a principal–agent perspective, socialization is a relatively costless way for principals to insure compliance by subordinates (Wood & Toppelberg, 2017; Gates, 2002, 2017). After all, compliance because 'it's the right thing to do' (socialization) will – for the principal – be less costly than ensuring it through force (coercion) or material incentives (instrumental calculation).

At a more micro-level, instrumental calculation may well be a socialization mechanism. For sure, when instrumental mechanisms operate alone, there can be no socialization that ends in internalization: individuals will simply adapt their behaviour to the norms and rules favoured by the group, but abandon the behaviour once outside it (Fujii, 2009; Krause, 2015). However, it is possible that what starts as behavioural adaptation, may – due to various cognitive and institutional lock-in effects – later become sustained compliance that is strongly suggestive of internalization.

Indeed, research on self-persuasion and cognitive dissonance suggests that internalization can occur even when socialization efforts are minimal. Human beings tend to resolve cognitive dissonance by adapting their preferences to their behaviour, internalizing the justification (Zuern & Checkel, 2005; see also Fearon, 1998: 54; Littman & Paluck, 2015: 88; Martens, Kosloff & Eckstein Jackson, 2010). This dynamic is suggested by Cohen (2017) and Fujii (2017), where what begins as a rational search for physical security becomes internalized as 'appropriate' violence.

Mechanisms of socialization

Causal mechanisms have been defined as 'the pathway or process by which an effect is produced or a purpose is accomplished' (Gerring, 2007: 178; see also Falleti & Lynch, 2009: 1149; Hedstroem & Ylikoski, 2010). In exploring the mechanisms that socialize to violence, it is important to recognize that both violent and nonviolent ones can be at work. We thus theorize possible roles for persuasion (Johnston, 2001, 2008; Lynch, 2013); social learning (Price, 1998; Hoover Green, 2011); role playing (Beyers, 2005; Bateson, 2017); and instrumental calculation (Hooghe, 2001: Ch. 1; Schimmelfennig, 2005; Wood, 2014; Gates, 2017), as well as collective violence (Cohen, 2013a,b); and hazing and dehumanization (Kelman & Hamilton, 1989; Wood, 2010; Manekin, 2013).

At the same time, the broader social context in which a group operates may influence its practices and norms, be this the insecurity of irregular warfare (Cohen, 2017), social exclusion/marginalization (Rodgers & Hazen, 2014), sexism and exploitative sexual norms (Wood, 2014; Marks, 2014), or racism (Wildt, 2002). Thus, Fujii (2017) documents how violent public display – by reshaping prevailing social norms – may be a critical mechanism for subsequent socialization to violence within a group (see also Krause, 2015; Vargas Castillo, 2015). In addition, and as discussed below, mechanisms of learning and imitation can connect this macro-structural context to group dynamics by facilitating the spread of norms and practices between groups.[2]

Agency's role

Our focus on the group makes it easy to lose sight of the individual in socialization This points to a need to theorize agency, which I do in three ways. A first is top-down and focuses on leaders – rebel commanders, say – and the techniques they use to socialize group members.[3] Agency of this type is well captured in work on military socialization. Group leaders employ mechanisms such as hazing and dehumanization, alongside less violent techniques such as education, drills and persuasion (Manekin, 2017). The latter might be especially relevant for rebel groups that are ideological in nature (Hoover Green, 2011; Gutiérrez-Sanín & Wood, 2014),

[2] See also recent work on gang networks and violence (Rodgers & Muggah, 2009; Krause, 2015), and on diffusion (Simmons, Dobbin & Garrett, 2007; Wood, 2013).

[3] Wood & Toppelberg (2017) reverse the causal arrow here, exploring how leaders themselves may be targets of socialization.

but nonviolent mechanisms are also effective in non-ideological groups with a charismatic leader, including gangs (Marks, 2013; Rodgers, 2017).

A second type of agency is bottom-up. In this case, the agents are the socialization targets, who may resist or be otherwise unreceptive to a socializer's message, or may seek to join the group. This recognition of socialization as a two-way street has been largely missing in the literature (Kelman & Hamilton, 1989: Ch. 5; Cortell & Davis, 1996, 2005). Even in cases of military socialization or that within rebel groups and gangs, where limited agency is more likely, resistance still occurs, albeit through more indirect and discrete forms (see also Manekin, 2017).

Whatever the case, it is important to problematize the relation between the socializing agency and its target, exploring, for example, the roles of age and so-called cognitive priors that lead a target to resist. A core finding of the early sociological studies was that young people, especially children, were more easily socialized than adults. It is thus not surprising that civil war research finds child soldiers highly susceptible to socialization, as Vermeij's (2014) detailed study suggests. However, work on regional organizations (Checkel, 2007), rebel groups (Cohen, 2013a,b) and participation in mass political violence (Wildt, 2002; Krause, 2015) suggests that socialization in fact also occurs with older individuals.

Why might this be the case? Perhaps age matters less when an individual is a novice, with few cognitive priors that might block a socialization message (Johnston, 2001; Gheciu, 2005)? Or maybe age matters less where the primary socializing agencies (schools, families, churches) are weak or absent, as in many conflict/post-conflict settings. In this case, primacy effects will be trumped by recency effects (Johnston, 2005: 1019–1020). In plain language, this might mean that rebel or gang recruits, no matter what their age, will be highly susceptible to socialization because of weak primary organizations.

A third element of agency and its effect on socialization might best be called horizontal. If the first two describe an agent's role in formal, intentional socialization (or resistance to it), the third captures a more subtle and informal kind, where norms and practices may spread within and beyond groups through peer learning and imitation (Rogoff et al., 2003; see also Wheeler, 1961). Socialization happens not from the top down, but sideways. These peers may be the group leaders, learning from other groups (Rodgers & Muggah, 2009). Informal, cross-group socialization may occur among the targets/recruits as well (Wood & Toppelberg, 2017).

Socialization outcomes

My starting point is to recognize the variable staying power of the norms and practices learned in a group for an individual who leaves it. Building upon Kelman & Hamilton's (1989: Ch. 5) typology, one can theorize three distinct socialization outcomes (see also Hurd, 1999). When the socialization is based on rational calculation of the group member in response to incentives – coercive or not – we might logically label it 'Type 0' (see also Gutiérrez-Sanín & Wood, 2014: 218), as no internalization occurs. The individual would thus not be expected to uphold the group's norms and practices once she leaves (although some adherence to group norms might persist, in cases of self-persuasion and cognitive dissonance – see above).

Types I and II then distinguish two levels of internalization (Checkel, 2007; see also Risse, Ropp & Sikkink 2013: Ch. 15), where group processes have more staying power. With Type I, an individual exhibits pro-group behaviour by learning a role – acquiring the knowledge that enables action in accordance with group expectations. The beliefs associated with this role do not replace earlier values, but are 'superimposed' on them; they are entirely dependent on continuing membership in the group (Kelman & Hamilton, 1989: 105). Appropriate group behaviour means simply that conscious instrumental calculation has been replaced by role playing.

Type II socialization is deeper. An individual accepts group norms as the right thing to do; she adopts the interests or possibly the identity of the community of which she is a member. Conscious instrumental calculation and role playing have been replaced by taken-for-grantedness or full internalization. The behaviour derived from this internalization 'gradually becomes independent of the external source' (Kelman & Hamilton, 1989: 109) – the group, in our case.

These distinctions matter not only for theory. Say that members of a rebel group have undergone Type 0 or I socialization. Once they leave the group and the specific environment that creates particular roles, they will drop that group behaviour, in what gangologists call a 'desistance process' (Rodgers, 2017). Ex-rebel fighters should adopt a less violent lifestyle.

Many DDR programs are built on such an understanding of socialization outcomes, reducing reintegration to the creation of incentives – offering jobs, say – that will shape participants' subsequent (rational) behaviour (see Vermeij, 2014: Ch. 9). However, if rebel combatants have undergone the deeper, Type II socialization, they may well misread such incentives. DDR programs will instead need a longer-term focus and

different means for re-socializing these individuals (see also Nussio & Oppenheim, 2014: 1003; Littman & Paluck, 2015).

Socialization in action: Methods and preview of the special issue

This section introduces the nine articles that comprise the special issue, and does so by highlighting common findings as well as key analytic moves. However, it is first necessary to address methods, with the challenge being 'to recognize socialization if it were to walk through the door'.

Methods

Arguments about socialization often face a sceptical, how-do-you-really-know reaction. However, such concern is misplaced, as scholars have begun to address the methodological requirements for measuring norms, practices and (possible) changes in interests, roles or identities, be it in civil war (Wood, 2003: Ch. 2) or in socialization processes more generally (Checkel, 2007: Ch. 1). Building on this work, contributors to the special issue make three moves as they develop and test their arguments.

First, they draw upon a variety of methods – including participant observation, interviewing, life histories, dataset analysis and process tracing – to measure and draw inferences about socialization and its mechanisms. They take care to make visible both the empirical foundation and logic of inquiry undergirding the arguments (Wood, 2003; Checkel, 2007; Symposium, 2014, 2015). For example, in her study of paramilitary patrols in post-civil war Guatemala, Bateson (2017) does not just invoke the phrase 'process tracing' to explain her method. Instead, she tells us how different data are interpreted as evidence (or not) of the observable implications of her socialization argument and mechanisms – in other words, process tracing in an applied and operational sense.

Second, many contributors address the measurement/causal-inference challenge ('how would I recognize socialization if it were to walk through the door?') in another, indirect way – by considering alternative explanations to their socialization account. Thus, Wood & Toppelberg (2017) show that existing explanations for sexual assault within the US military (continuity with civilian culture, recruitment patterns, organizational culture) fail to explain the striking persistence of such behaviour; this then creates explanatory space for their socialization argument.

Third, all articles describe their source material fully, so readers understand the evidentiary base for particular arguments. Eight of the nine articles provide details on archival materials, methods, case histories and interviews in an Online appendix – subject to research-ethical constraints.

The above indicates that contributors take transparency seriously. This is simply good research practice, albeit perhaps more important during a period when debates over DA-RT (Data Access and Research Transparency) and JETS (Journal Editors' Transparency Statement) are roiling the profession (Symposium, 2016). At the same time, intensive field research in violent settings places ethical and practical constraints on just how accessible data can be (Parkinson & Wood, 2015). Thus, whether field notes or interview transcripts were shared – in an Online appendix or even in a transparency index (Moravscik, 2014) – was a choice left to the researcher and not dictated by me in my capacity as guest editor for the special issue.

Preview: Common findings, divergent analytic moves

The most important finding of this special issue is that the socialization framework advanced here does shed new light on the social processes producing violence. The issue's nine empirical studies demonstrate that violence is not only a consequence of strategic choice, or the result of strategic interaction between two actors; it is also fostered by social processes within the group. Previous work in conflict studies has missed such dynamics, in part due to a theoretical preference for political economy models, in part due to reliance on quantitative methods ill equipped to measure process, and in part simply due to a lack of good data at the group level.

This common finding, I should stress, is not one generated by a bunch of socialization 'groupees' – scholars who feel socialization must be the answer, whatever the question. Both the opening article and the empirical studies theorize and document limits to the socializing power of the group. These limits are revealed when agency is restored to the targets of socialization (Manekin, 2017; Wood & Toppelberg, 2017), when the group is properly situated in its larger context and setting (Fujii, 2017; Rodgers, 2017), or when socialization processes are compared across institutions (Hoover Green, 2017).

A second common finding is that more remains to be done. As discussed below, the special issue falls short theoretically, not at the level of individual contributions but in advancing general arguments on socialization and

violence. Methodologically, challenges both ethical and practical remain in measuring social processes.

In introducing the issue's other contributions, I note they are not ordered thematically (civil war, gangs, national militaries, say), but are clustered according to particular theoretical or methodological similarities. Integrating across the various articles, readers will thus appreciate that our arguments are not just about gangs (or national militaries, or rebel groups, etc.).

The issue opens with two articles that emphasize agency in the socialization–violence relation. Devorah Manekin (2017) explores the limits of military socialization – that is, how some soldiers come to resist the normalization of violence. Drawing on the case of the Israeli Defense Force in the Second Intifada and on in-depth interviews with former combatants, she argues that resistance – the exercise of agency – is likely when soldiers are not able to reconcile the content of their training with the circumstances of their deployment.

Elisabeth Wood & Nathaniel Toppelberg (2017) seek to understand the persistence of sexual violence in the ranks of the US military. Developing a four-step argument that theorizes both formal and informal socialization, they, too, highlight agency – not of the recruits (à la Manekin), but of the officers doing the socializing. They argue that these officers are in fact also a target of socialization, and this helps explain why sexual violence – despite almost three decades of a 'zero-tolerance' policy – remains a serious problem for the US armed forces.

The next five articles theorize a greater role for structure, context and layering in understanding the relation of socialization to violence. Regina Bateson (2017) extends my idea of layered socialization, exploring its role in the continuing operation of civil patrols in Guatemala, over 20 years after the country's civil war ended. She argues that two distinct socialization processes have contributed to the persistence of civil patrols – selective socialization within the patrols themselves, and civilian socialization during the civil war.

In his contribution, Dennis Rodgers (2017) explores how gangs socialize individuals into violence, highlighting how socialization is a fundamentally embedded and layered process. Drawing upon longitudinal ethnographic research in a poor urban neighbourhood of Managua, Nicaragua, he explores the connection between different types of gang violence and distinct forms of socialization, from context-driven to group activities to particular relationships with the leader.

Lee Ann Fujii (2017) reminds us that while socialization is typically a group-based process, it is important not to overlook its broader context. This has both structural elements and situational logics that push or pull people toward collective participation in violence. Fujii explores one such logic – violent display – which is about constructing meaning through violent acts and practices that people do to be seen; these violent displays inscribe new meanings by casting everyone into various roles. She then applies the argument to the Bosnian civil war and extra-legal lynchings in the USA.

Exploring how rebel groups that rely on forced recruitment can nonetheless prevent desertion, Scott Gates (2017) argues the solution to this puzzle rests in socialization mechanisms that shape the allegiance of forcibly recruited soldiers. Those very mechanisms are themselves a function of the broader context of group-based socialization. Advancing a novel combination of socialization theory and rational choice analysis, Gates demonstrates that mechanisms altering preferences through Type II socialization are effective in retaining recruits, and that the highest level of retention occurs when several mechanisms work in concert. Illustrative case studies focus on rebel groups in Uganda, Sierra Leone, Nepal and Liberia.

In her analysis of the Salvadoran civil war, Amelia Hoover Green (2017) brings structure and context to the fore, but in a different and more systematic way. Reviewing socialization dynamics in both non-state and state armed organizations, she argues one needs to consider institutions and how the constraints and incentives that affect institution-building differ between state and non-state armed groups. In turn, this should lead to systematic – and observable – differences in their socialization processes.

The final two articles demonstrate it is possible to study the socialization–violence relation with quantitative methods. Thus, they part company with the issue's other contributions and with contemporary work on socialization by IR scholars – all of whom use exclusively qualitative techniques.

In her article, Dara Cohen (2017) argues that non-state armed groups utilize wartime rape to foster socialization. She shows how gang rape is a form of group violence that increases social cohesion, thus enabling armed groups with forcibly recruited fighters to create bonds of loyalty and esteem. Drawing primarily upon survey data on the civil war in the Democratic Republic of Congo, Cohen documents how armed groups use violence instrumentally both to integrate new members and to organize the structure of the group.

Stephen Moncrief (2017) examines the sexual exploitation and abuse (SEA) of civilians by international peacekeepers. He argues that the socialization

experiences of troops in two environments – the contributing state military and the peacekeeping mission itself – help to explain the observed variation of SEA. Drawing on a dataset of SEA allegations between 2007 and 2014, as well as the first publicly available data from the United Nations that identify the nationalities of alleged perpetrators, Moncrief quantitatively analyzes the layered nature of socialization, showing that a peacekeeping mission may carry its own socialization processes that can either constrain or facilitate the emergence of SEA.

The social production of violence: Challenges ahead

The special issue rethinks group-level processes using a socialization frame and shows the value of this approach for understanding better the social production of violence. Yet, the individual contributions – for all their care and rigour in execution – also highlight several theoretical and methodological challenges that remain.

Starting with theory, the past decade has seen students of both socialization (Risse, Ropp, Sikkink, 2013; Goodman & Jinks, 2013: Ch. 2) and civil conflicts (Bakke, Cunningham & Seymour, 2012: 278; Checkel, 2013a: Ch. 1) increasingly think in terms of causal mechanisms; contributors to this special issue do the same. Yet, scholars who disaggregate in this manner typically do not relate the mechanisms to one another in some broader framework. The problem is that a roster of causal mechanisms is not the same as a theory with some generalizability (Gates, 2008; Checkel, 2013b: 233–234).[4]

Many who theorize socialization mechanisms claim their work results in mid-range theory. But what does this mean? How do we develop multicausal arguments – for that is the essence of middle-range approaches (George, 1993) – without simultaneously producing overdetermined outcomes? Sadly, even leading proponents of a move to middle-range, mechanism-based thinking are silent on this score (Katzenstein & Sil, 2010; Sil & Katzenstein, 2010).

Thus, when a research program is dominated by middle-range approaches, the production of cumulative theoretical knowledge may be hindered. For work on socialization and violence, the various middle-range efforts are not coalescing into a theoretical whole. This holds as well for the theoretically ambitious articles in the issue – be it the typology offered by Wood & Toppelberg (2017) or Gates's (2017) scope conditions for different socialization mechanisms.

In addition, middle-range approaches tend to adopt a micro-focus, theorizing causal mechanisms in some temporally or spatially delimited frame (Haas, 2010: 11). The danger is then to miss the macro level, where material power and social discourses fundamentally shape and predetermine the mechanisms playing out at lower levels.[5] Moreover, middle-range theories 'inevitably leave out "big questions"' found at higher levels of analysis (Nau, 2011: 489–490).

One way to address these analytic problems is typological theory, or theories about how combinations of mechanisms shape outcomes for specified populations (Bennett & George, 2005: Ch. 11; Elman, 2005). Compared to middle-range approaches, this form of theorizing stimulates fruitful iteration between cases and the specification of populations and theories, and creates a framework for cumulative progress. For example, Bennett (2013) shows how typological theorizing could be used to promote cumulation, even in the hard case of mid-range, theoretically plural accounts of civil war.

Turning to method, the challenge is how to measure the causal mechanisms that figure centrally in so many accounts of group-level social processes. The practical, data and ethical requirements of process tracing – the method of choice in studies of socialization – are not fully appreciated. There is now a sizeable body of scholarship that establishes best-practice standards for this technique (Hall, 2002; Bennett & George, 2005: Ch. 10; Bennett, 2008; Checkel, 2008; Collier, 2011; Beach & Pedersen, 2013; Bennett & Checkel, 2015), including in studies of violence and conflict (Bakke, 2014; Lyall, 2015).

Building on the careful effort in Bateson (2017), future research on socialization and violence needs to embrace this process-tracing literature. This means – to begin – that causal mechanisms are fully theorized. The more care at this stage, the clearer will be those mechanisms' observable implications. As Jacobs (2015: 42) puts it, 'tightly specified theories with detailed mechanisms can substantially enhance the discriminating power of process tracing by generating relatively sharp and unique empirical predictions'.

[4] This problem extends beyond the literature discussed here. See Mearsheimer & Walt (2013), Checkel (2013b: 233–234), Wight, Hansen & Dunne (2013), and Parsons (2015).

[5] The two contributions by interpretivists to the special issue – Fujii (2017) and Rodgers (2017) – best capture this macro-context, which speaks to the importance of breaking down not only disciplinary silos, but epistemological compartmentalization.

In addition, good process tracing should address equifinality, where multiple causal pathways may lead to the same outcome. One needs to specify these other candidate mechanisms, identify their observable implications and conduct some process tracing on them (Bennett & Checkel, 2015: Ch. 1). Such considerations need attention at an early stage in the research design (Lyall, 2015). As this special issue is largely a theory-building exercise, our emphasis has not been on designs that address equifinality; however, future work must embrace the challenge. This means even more (time-intensive) process tracing in a subject area – conflict/violence – where researchers inevitably confront serious ethical challenges (Parkinson & Wood, 2015).

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