

# ISIS vs. Al Qaeda: An Ideological Comparison

A Monograph

by

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## Abstract

Al Qaeda vs. ISIS: An Ideological Comparison, by MAJ Lucas G. Harris, 52 pages.

This paper addresses the ideological differences that drive the divergent strategies pursued by Al Qaeda and ISIS. It examines the history and ideological background that is relevant to both organizations to provide an appropriate level of context. Using a qualitative comparative case study methodology, the paper provides a detailed study of the key ideological facets that shape how Al Qaeda and ISIS formulate their respective strategies. Finally, the paper analyzes the key differences between the groups and explains how this information can be useful to operational planners. The key findings are that Al Qaeda and ISIS have fundamentally different ideological views about how to unite and purify the Islamic *Umma* and wage jihad, which drive vastly different strategies. The findings from this monograph can be particularly useful for future planners as they build operational approaches for combating Al Qaeda and ISIS, and for anticipating the actions of other Sunni jihadist groups.

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## Acronyms

AQAP	Al Qaeda in the Arabian Peninsula
AQI	Al Qaeda in Iraq
AQIM	Al Qaeda in the Islamic Maghreb
ISI	Islamic State of Iraq
ISIS	Islamic State of Iraq and Syria (or Sham)
ISIS-K	Islamic State of Iraq and Syria-Khorasan
JTJ	Jam'at Tawhid wal-Jihad

## Introduction

For many Americans the Al Qaeda attacks of September 11, 2001 came as a surprise. Al Qaeda explained their grievances through various proclamations and had already committed several attacks but failed to garner sufficient attention from US security agencies. Similarly, when the Islamic State of Iraq and Syria (ISIS) declared a caliphate in June 2014, it caught most of the world off guard, largely because very few understood their ideology, and how it drove their strategy.

Since 9/11, Al Qaeda has responded to challenges in the operational environment, but their foundational vision remains and the threat they pose to the United States and international security remains real. ISIS lost its headquarters in Raqqa, Syria in October 2017, but they continue to oversee *wilayat* (provinces) all over the globe. They are returning to their insurgent roots, which facilitated a quick and unexpected rise to power in 2014.<sup>1</sup> Despite the losses of both organizations, intellectual debate on their ideologies remains necessary.

The primary research objective of this monograph is to identify the extent to which ideological differences drive the divergent strategies pursued by Al Qaeda and ISIS. To reach this objective, the monograph explored two common tenets of ideology most applicable to Al Qaeda and ISIS that were consistent in the research: uniting and purifying the Islamic *Umma* (community) and waging jihad. Each group centers their ideology on these two aspects.

Al Qaeda and ISIS are not identical in either ideology or strategy. Yet across the US military, there is little understanding on how they differ. The aim of this monograph is to fill that void in understanding by demonstrating the fundamental ideological differences that mold the diverging strategies of each group. A better understanding of the ideologies that drive each will enable more effective strategies to minimize the danger they pose to the world. It will also help

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<sup>1</sup> Andrew Byers and Tara Mooney, "ISIS After the Caliphate," *Small Wars Journal*, September 2, 2017, accessed September 12, 2017, <http://smallwarsjournal.com/jrnl/art/isis-after-the-caliphate>.

anticipate future threats from likeminded groups.

The United States' most recent National Security Strategy stated that jihadist groups like ISIS and Al Qaeda are "linked by a common radical Islamist ideology that encourages violence against the United States and our partners and produces misery for those under their control."<sup>2</sup> It went on to state that although the United States has made significant gains against ISIS and Al Qaeda, both organizations "maintain global reach with established branches in strategic locations."<sup>3</sup> As long as their ideologies persist, the United States can expect to contend with this issue for the foreseeable future.

The monograph consists of four sections. The first section includes the organizational historical background of Al Qaeda and ISIS to give the reader context. This history focuses on their foundational visions and the historical circumstances that fostered their inception. It examines how historical conditions interacted with their ideology and illustrates the consistency in their worldview.

The second section includes background information on the ideological figures that inspired both groups: Ibn Tamiyyah, Sayyid Qutb, Abdullah Azzam, and Abu Bakr Naji. The section also explains two of the more relevant terms in Islam as they pertain to Al Qaeda and ISIS: Salafism and caliphate. The third section examines the ideologies that drive Al Qaeda and ISIS. It explores their ideas on uniting and purifying the Islamic *Umma* (community), jihad, the caliphate, and other aspects that are fundamental to what drives their strategy. The section concludes with a comparison of ideological similarities and differences.

The fourth section covers key facets of Al Qaeda's and ISIS's strategies, including how they view affiliates and territorial control. It illustrates the nexus between ideology and strategy

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<sup>2</sup> National Security Strategy of the United States of America, The White House, December 2017, accessed December 19, 2017, <https://www.whitehouse.gov/wp-content/uploads/2017/12/NSS-Final-12-18-2017-0905.pdf>.

<sup>3</sup> Ibid.

and concludes by comparing similarities and differences. Finally, the fifth section summarizes the monograph and offers recommendations for the utility of this information in the future.

## Literature Review and Methodology

The literature on Al Qaeda and ISIS is extensive; however, little writing exists comparing the two. Consequently, many Americans view them as homogenous. William McCants from the *Brookings Institution* has written extensively on ISIS, including on its apocalyptic vision and views on the caliphate. Daniel Byman from Johns Hopkins University is one of the foremost experts on Al Qaeda and wrote detailed studies on their ideology, financial activities, and relationships with affiliates. Fawaz Gerges from the London School of Economics is one of the leading authorities on political Islam, jihadism, Al Qaeda and Islamic relations with the United States. He also published detailed works on ISIS explaining the conditions that led to their rise to power and the ramifications their actions will have on the future of the Middle East. His book, *ISIS: A History*, provided a comparison of Al Qaeda and ISIS, but it was limited in scope and did not address their deeper ideological differences. Aaron Zelin, a fellow at the Washington Institute for Near East Policy, is an expert on Sunni jihadist groups in general. His website, *Jihadology*, was an excellent repository of articles germane to this subject. Zelin is also one of the primary experts on ISIS's territorial methodology.

This monograph will add to the existing literature by providing a comprehensive examination of the ideological and strategic differences between Al Qaeda and ISIS using a qualitative case study approach. The research began with an examination of secondary sources from the leading experts on the subject to find consistent themes in their research and identify common primary sources they used to support their arguments. The project then conducted an examination of the primary evidence, especially works published by members of Al Qaeda and ISIS, including proclamations, speeches, and letters by the key leaders of Al Qaeda and ISIS. These sources include Osama bin Laden's and Ayman al-Zawahiri's various declarations and

ISIS's magazine, *Dabiq* and *Rumiyah*. This helped identify which Islamic ideological figures each group most identified with while providing a better understanding of the nexus between ideology and strategy. The major assumption going into the project was that Al Qaeda and ISIS are not homogenous organizations and do have ideological differences that produce divergent strategies. This was validated by the primary evidence, most specifically the language used by key leaders from each organization.

The information presented will enable planners to develop operational approaches to counter and anticipate the future actions of Al Qaeda and ISIS, as well as the actions of other Sunni jihadist groups. An educated military force that continuously studies and engages in discourse on this subject will be better prepared for future operations against Sunni jihadist groups that have proven to be adaptive and resilient.

## Organizational Historical Background

### History of Al Qaeda

Al Qaeda was formed under the anti-Soviet jihad that materialized during the Soviet Union's war in Afghanistan in the 1980s. As the conflict concluded, Osama bin Laden and his inner circle, under the mentorship of Abdullah Azzam, capitalized on the gains made during the war and turned their network into a global jihadist movement. Bin Laden's vision was to craft a vanguard of elite fighters who could lead the global jihad movement and unite disparate jihadist groups under a single umbrella.<sup>4</sup> He envisioned an organization that would engage on behalf of oppressed Muslims worldwide, fight a defensive jihad against perceived US and allied aggression, and advance the fundamental principles of Islam.

Following Azzam's assassination in 1989, Ayman al-Zawahiri, filled Al Qaeda's

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<sup>4</sup> Daniel L. Byman, "Comparing Al Qaeda and ISIS: Different Goals, Different Targets," *The Brookings Institution*, April 29, 2015, accessed September 6, 2017, <https://www.brookings.edu/testimonies/comparing-al-qaeda-and-isis-different-goals-different-targets/>.

ideological void and, with bin Laden, formulated its strategic vision. Under their leadership, Al Qaeda's ideology centered on carrying out armed struggle against the perceived enemies of Islam who were engaged in a global conspiracy against the religion.<sup>5</sup> The group launched an ideological campaign to rally support for jihad against Islam's enemies. With the momentum gained, and a level of ambition not seen previously by jihadist organizations, Al Qaeda carried out multiple high-profile attacks in the late 1990s and the most devastating terrorist attack in history on September 11, 2001.

Counterterrorism efforts decimated Al Qaeda's core elements and organizational infrastructure since 9/11. However, Al Qaeda's unifying vision has not wavered. Zawahiri maintained the group's original focus on jihad after bin Laden's death in 2011. In 2013, Zawahiri issued his "Jihadist Guidelines" to members of Al Qaeda reasserting the same ideological principles.<sup>6</sup> As recently as June 2017, Zawahiri in a statement titled, "One *Ummah*, One War on Multiple Fronts," again emphasized Al Qaeda's original core ideology, calling on all Muslims to engage in jihad against aggression from the United States and its allies.<sup>7</sup>

## History of ISIS

Abu Musab al-Zarqawi planted the seeds of ISIS in 1999 when he established a training camp near Herat, Afghanistan and founded *Jam'at Tawhid wal-Jihad* (JTJ). He later established a training camp in northeastern Iraq in 2002.<sup>8</sup> The 2003 Iraq war allowed ISIS to develop its

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<sup>5</sup> Rohan Gunaratna. "Al Qaeda's Ideology," *Hudson Institute*, May 19, 2005, accessed September 14, 2017, <https://www.hudson.org/research/9777-al-qaeda-s-ideology>.

<sup>6</sup> Ayman al-Zawahiri, "General Guidelines for Jihad," address to jihadists, September 19, 2013, accessed September 14, 2017, <https://www.arammah.com/as-shab-tqdm-twjyhat-aamt-llml-al-jhady-llshykh-al-amyr-aymn-az-zwahry/>.

<sup>7</sup> Thomas Joscelyn, "Zawahiri Lectures on Global Jihad, Warns of National Boundaries," *Long War Journal*, June 10, 2017, accessed September 17, 2017, <https://www.longwarjournal.org/archives/2017/06/zawahiri-lectures-on-global-jihad-warns-of-national-boundaries.php>.

<sup>8</sup> Cole Bunzel, "From Paper State to Caliphate: The Ideology of the Islamic State," *The Brookings Institution*, March 2015, accessed July 20, 2017, <https://www.brookings.edu/wp-content/uploads/2016/06/The-ideology-of-the-Islamic-State.pdf>.

ideology within the framework of the Iraqi insurgency during a period that witnessed the arrival of a younger and more extreme brand of Salafi (strict Sunni Muslim sect) jihadism.<sup>9</sup> The group rebranded itself as Al Qaeda in Iraq (AQI) after Zarqawi pledged *bay'a* (allegiance) to bin Laden. Unlike bin Laden, Zarqawi envisioned a caliphate created by blood and violence. Iraq gave him the opportunity to see this through.<sup>10</sup> He purposefully used violence to generate a civil war with Iraq's Shia population and compel Iraq's Sunnis to support establishing an Islamic State.<sup>11</sup> Under Zarqawi's leadership, AQI launched a sophisticated insurgency aimed at killing US troops, but more importantly, at creating a void that would enable the establishment of an Islamic state.

After Zarqawi was killed in June 2006 by a US air strike, the group renamed itself the Islamic State of Iraq (ISI), but their influence dwindled after US military efforts intensified. Zarqawi's initial vision remained intact and when the United States departed at the end of 2011, ISI had a golden opportunity. The Iraqi government, mainly led by Shia, took a series of missteps that infuriated the country's Sunni population. Meanwhile, the Arab Spring was in full effect across North Africa, Yemen, Bahrain, Jordan, and, most importantly, Syria, where a civil war ignited. The conditions were ripe for ISI and they seized the opportunity.<sup>12</sup>

Under the leadership of its new leader, Abu Bakr al-Baghdadi, ISI built relationships and created operational flexibility inside Syria, while also renaming itself "The Islamic State of Iraq and *Sham* (Syria)." In Syria, the group built relationships, intimidated possible enemies, and conducted a multiyear engagement program, thereby setting the foundation for their future successes.<sup>13</sup> The program offered a "shared vision" of the country that included Sunni majority

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<sup>9</sup> Bunzel, "From Paper State to Caliphate."

<sup>10</sup> Brian L. Steed, *ISIS: An Introduction and Guide to the Islamic State* (Santa Barbara, CA: ABC-CLIO, 2016), 22.

<sup>11</sup> *Ibid.*, 23.

<sup>12</sup> *Ibid.*, 24-27.

<sup>13</sup> *Ibid.*, 29.

control.<sup>14</sup> ISIS returned to Iraq in 2014 in force and seized territory without much opposition. The group's calculated efforts over the course of several years paid off. All their successes in 2014 were enabled by a strict adherence to Zarqawi's foundational vision of establishing a caliphate.

Zarqawi's legacy endured as ISIS acquired territory in Iraq and Syria and built provinces stretching from Afghanistan to North Africa. The international community, led by the United States, pushed back forcing ISIS to vacate previously held territory. Despite these setbacks and changes to the operational environment, ISIS's vision and ideology persist.

From their foundations onward, both Al Qaeda and ISIS have visions and ideological aspirations imperturbable to setbacks or changes to the operational environment. Battlefield conditions forced both groups to adapt, but with a common understanding and shared purpose they persisted in maintaining the ideologies that initially propelled their successes.

## Ideological Background

Islam's function is to change people's beliefs and actions.... Its method is Divinely-ordained and is entirely different from all the valueless methods of short-sighted human beings.

—Sayyid Qutb, *Milestones*

One key facet of the ideological background of Al Qaeda and ISIS is the ultra-conservative branch of jihadism known as Salafism. Salafism emerged in the latter half of the 19<sup>th</sup> century and originated from *al-Salaf*, the companions of the Prophet Muhammad.<sup>15</sup> *Al-salaf* is typically used in conjunction with *al-salih* to mean “virtuous forefathers.”<sup>16</sup> Salafism urges

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<sup>14</sup> Steed, *ISIS: An Introduction and Guide to the Islamic State*, 11.

<sup>15</sup> Guilain Denoeux, “The Forgotten Swamp: Navigating Political Islam,” *Middle East Policy*, no. 2 (June 2002): 56-82, accessed July 20, 2017, [http://www.blackwellpublishing.com/content/BPL/Images/Journal\\_Samples/mepo1061-1924~9~2~057%5C057.pdf](http://www.blackwellpublishing.com/content/BPL/Images/Journal_Samples/mepo1061-1924~9~2~057%5C057.pdf), 59.

<sup>16</sup> Denoeux, “The Forgotten Swamp: Navigating Political Islam,” 59.

Muslims to return to the form of Islam practiced by Muhammad and his closest followers.<sup>17</sup>

Salafists define Islam as anything explicitly allowed by Muhammad and support his first three generations of followers up until the ninth century.<sup>18</sup> They reject forms of Islam not congruent with the Quran and Muhammad's actions.<sup>19</sup>

Several leading theorists on jihad provided a guiding ideological framework for Al Qaeda and ISIS. These include Ibn Tamiyyah, a 13<sup>th</sup> century theologian who is the most quoted individual by ISIS; Sayyid Qutb, a founding member of the Muslim Brotherhood who influenced Osama bin Laden; Abu Bakr Naji, an Islamist strategist whose book, *The Management of Savagery*, inspired Islamic extremists worldwide; and Abdullah Azzam, one of the principal founders of Al Qaeda.

Ibn Tamiyyah (1263-1328) was a medieval Sunni Islamic theologian. His teachings are influential to the Salafi jihadist ideology. Tamiyyah is often quoted by ISIS in their two publications, *Dabiq* and *Rumiyah*. Osama bin Laden also referenced Tamiyyah, including in his prominent "Declaration of Jihad Against the Americans."<sup>20</sup> Tamiyyah lived during the late 13<sup>th</sup> century when Mongols invaded the Muslim world. He advocated jihad, even though the Mongol king was a Muslim convert. However, because the Mongol ruler allowed tribal law to be practiced concurrently with sharia law, Tamiyyah argued the Mongols were apostates and could be targets for jihad.<sup>21</sup> Contemporary Salafi jihadist organizations, such as ISIS, cite Tamiyyah as an authority for supporting jihad against Muslim rulers who fail to exclusively impose sharia

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<sup>17</sup> Denoeux, "The Forgotten Swamp: Navigating Political Islam," 59.

<sup>18</sup> Jacob Olidart, "What is Salafism?" *Foreign Affairs*, November 24, 2015, accessed July 20, 2017, <https://www.foreignaffairs.com/articles/syria/2015-11-24/what-salafism>.

<sup>19</sup> Denoeux, "The Forgotten Swamp: Navigating Political Islam," 60.

<sup>20</sup> Osama bin Laden, "Declaration of Jihad Against the Americans Occupying the Land of the Two Holy Sanctuaries," in Kepel, Gilles, Jean-Pierre Milelli, and Pascale Ghazaleh, *Al Qaeda in its Own Words* (Cambridge: The Belknap Press of Harvard University Press, 2009), 49.

<sup>21</sup> Christopher Henzel, "The Origins of Al Qaeda's Ideology: Implications for US Strategy," *Parameters*, no. 1 (Spring 2005), 71.

law.<sup>22</sup>

Sayyid Qutb (1906-1966) was an activist and member of the Egyptian Muslim Brotherhood. He was influential to Osama bin Laden and Ayman al-Zawahiri. ISIS does not frequently directly reference Qutb, but they employ many of his ideas. Qutb divided the world into two camps: Islam and *jahiliyya* (state of ignorance that existed before the time of the Prophet Muhammad), something Al Qaeda and ISIS both do.<sup>23</sup> He committed himself to returning Islam to its original form based on the methodology of the Prophet Muhammad and his closest followers. Qutb's polemic argued that modern societies were in a state of *jahiliyya* with their emphasis on materialism, rather than Islamic values.<sup>24</sup> Qutb proclaimed that Muslims had an obligation to procure arms, fight, and form a vanguard until they eventually grew and had enough strength to destroy this state of *jahiliyya*.<sup>25</sup>

Qutb wanted to demonstrate the incompatibility of Islam with modernity and aimed to return the religion to its unpolluted origins.<sup>26</sup> He was deeply contemptuous of the United States and called for jihad against Muslim apostate regimes. Qutb was one of the first Islamists to encourage violence in the name of Islam. Osama bin Laden replicated his vanguard concept.

Abdullah Azzam (1941-1989) had a tremendous effect on Osama bin Laden in founding Al Qaeda. Azzam was passionate about the jihadist ideology and studied the works of Ibn

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<sup>22</sup> Henzel, "The Origins of Al Qaeda's Ideology: Implications for US Strategy," 71.

<sup>23</sup> Lawrence Wright, *The Looming Tower: Al Qaeda and the Road to 9/11* (New York: Vintage Books, 2006), 35.

<sup>24</sup> Ibid.

<sup>25</sup> Daniel Byman, *Al Qaeda, the Islamic State, and the Global Jihadist Movement: What Everyone Needs to Know* (Oxford: Oxford University Press, 2015), 74.

<sup>26</sup> Wright, *The Looming Tower*, 28.

Tamiyyah.<sup>27</sup> Azzam formulated a theoretical concept for “Al-Qaeda al-Sulba” (The Solid Base) to provide support for a global jihadist movement that could be staged from Afghanistan.<sup>28</sup> Azzam used the opportunity created by the Soviet-Afghan War to proliferate a uniquely radical view on jihad initially espoused by Ibn Tamiyyah. He viewed the Prophet Muhammad as a warrior and concentrated solely on his works that emphasized jihad. Azzam was also one of the first to highlight the concept of *takfir* (declaring other Muslims non-believers), a pivotal ideological weapon used by ISIS.<sup>29</sup> He proclaimed that there was a struggle of good versus evil between Muslims and the United States. Waging jihad was incumbent upon all Muslims in this struggle.<sup>30</sup>

Abu Bakr Naji (1961-2008) was presumed to be Al Qaeda’s chief of external operations before being killed by a US airstrike. His 2004 publication, *Management of Savagery: The Most Critical Stage Through Which the Umma Will Pass*, is the most influential work among contemporary jihadists. The book is circulated among ISIS’s provincial commanders because it provides a blueprint for creating an Islamic caliphate.<sup>31</sup> Abu Musab al-Zarqawi’s strategy aimed at total societal breakdown in Iraq mirrored Naji’s work. Naji advocated a battle plan designed to weaken states through what he called the “power of vexation and exhaustion.”<sup>32</sup>

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<sup>27</sup> Youssef Aboul Enein, “The Late Sheikh Abdullah Azzam’s Books,” *The West Point Combating Terrorism Center*, June 2010, accessed September 14, 2017, [https://ctc.usma.edu/v2/wp-content/uploads/2010/06/Azzam\\_part\\_3.pdf](https://ctc.usma.edu/v2/wp-content/uploads/2010/06/Azzam_part_3.pdf).

<sup>28</sup> Ibid.

<sup>29</sup> Ibid.

<sup>30</sup> Ibid.

<sup>31</sup> Fawaz A. Gerges, *ISIS: A History* (Princeton, NJ: Princeton University Press, 2016), 34.

<sup>32</sup> Abu Bakr Naji *The Management of Savagery: The Most Critical Stage Through Which the Umma Will Pass*, trans. William McCants, *John M. Olin Institute for Strategic Studies*, Harvard University, Cambridge, MA, May 23, 2006, accessed January 27, 2017, <https://azelin.files.wordpress.com/2010/08/abu-bakr-naji-the-management-of-savagery-the-most-critical-stage-through-which-the-umma-will-pass.pdf>.

Naji made the case for total war.<sup>33</sup> He contended that previous Salafi jihadists carried out isolated attacks with no comprehensive strategic plan, ultimately leading to failure.<sup>34</sup> His plan called for three phases of escalating and systematic violence. In the first phase, vexation and empowerment, the aim was to exhaust the state and overthrow the governing authorities by striking economically valuable targets. A state of “savagery and chaos” would ensue due to security breakdowns.<sup>35</sup> Jihadists would then move in and provide security and basic services to attain the support of the population and establish sharia law, leading to the second phase, administration of savagery.

With a network of these administrations of savagery established, the jihadists would eventually coalesce and begin phase three, establishing the Islamic state and caliphate.<sup>36</sup> Naji, like ISIS, was primarily focused on the “near enemy,” consisting of regional issues and secular apostate Muslim regimes.<sup>37</sup> The last few years of ISIS’s campaign present striking parallels to Naji’s plan outlined in the *Management of Savagery*.

Ibn Tamiyyah, Sayyid Qutb, Abdullah Azzam, and Abu Bakr Naji represent the most pertinent ideological figures invoked by Al Qaeda and ISIS. Each conveyed a similar narrative—using violence to achieve strategic goals. From the beginning, Al Qaeda was influenced by Sayyid Qutb, especially his vanguard concept, and Azzam’s vision for a global jihad was instrumental at the group’s founding. ISIS has regularly cited Tamiyyah, as reflected in *Dabiq* and *Rumiyah*, and adhered to Naji’s ideas on total war and phases for establishing the caliphate.

One point of ideological contention between Al Qaeda and ISIS is the caliphate. Using

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<sup>33</sup> Gerges, *ISIS: A History*, 36.

<sup>34</sup> Gerges, *ISIS: A History*, 36-37.

<sup>35</sup> *Ibid.*, 37; Naji, *Management of Savagery*, 48.

<sup>36</sup> Gerges, *ISIS: A History*, 37.

<sup>37</sup> *Ibid.*

Abu Bakr Naji's ideas, ISIS puts significant emphasis on the caliphate. A caliphate is "the rulership of Islam" and the caliph is the spiritual and earthly leader of the Islamic state.<sup>38</sup> The caliph is essentially "God's Deputy on Earth" and has authority over scholarly and religious matters.<sup>39</sup> Islam's political system is based on three principles: *tawhid* (oneness of God), *risalat* (prophet hood), and *khilafat* (vice regency).<sup>40</sup> The caliph is required to exercise his Allah-given powers within the limits defined by Allah.<sup>41</sup> Any state that is established according to Islam's three political principles and that has a caliph capable of exercising the duties prescribed within this "Allah-given authority" can be a "human caliphate under the sovereignty of Allah."<sup>42</sup> When ISIS declared the caliphate in 2014, Abu Bakr al-Baghdadi was considered the *khilafat* and the group based its state on the principle of *tawhid*.<sup>43</sup>

Ibn Khaldun, a 14<sup>th</sup> century Islamic historiographer, defined six requirements for assuming the role of caliph that have been agreed upon for centuries. One of them includes being a descendant of the Qureshi, the tribe of the Prophet Muhammad.<sup>44</sup> When ISIS announced the caliphate in 2014 and made Abu Bakr al-Baghdadi caliph, they made it known that Baghdadi was Qureshi.<sup>45</sup> Another key requirement to be caliph is to employ military forces and lead the *Umma* in holy war.<sup>46</sup> Baghdadi eagerly carried out this responsibility, as indicated by ISIS's willingness

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<sup>38</sup> Vernie Liebl, "The Caliphate," *Middle Eastern Studies*, no. 3 (May 2009), 374.

<sup>39</sup> Ibid.

<sup>40</sup> Sayyid Abul A'la Maududi, "Essential Features of the Islamic Political System," *Islam 101*, May 30, 2015, accessed September 11, 2017, <http://www.islam101.com/politics/politicalsystem.htm>.

<sup>41</sup> Ibid.

<sup>42</sup> Ibid.

<sup>43</sup> ISIS, "Khilafah Declared," *Dabiq*, June 2014, accessed November 1, 2017, <https://clarionproject.org/docs/isis-isil-islamic-state-magazine-Issue-1-the-return-of-khilafah.pdf>.

<sup>44</sup> Ibn Khaldun, *The Muqaddimah: An Introduction to History*, trans. Franz Rosenthal (Princeton: Princeton University Press, 1989), 158-159.

<sup>45</sup> ISIS, "Khilafah Declared."

<sup>46</sup> Ibid.

to conduct conventional military operations and seize territory.

Another key point about the caliphate that raises questions regarding ISIS's declaration in June 2014, is the principle of *hakimiyyah*, a term meaning all sovereignty belongs only to God.<sup>47</sup> Theorists like Sayyid Qutb concluded that there was a difference between “authority and enforcing authority.”<sup>48</sup> Authority can be gained by simply recognizing *hakimiyyah*; however, enforcing authority requires consent from the *Umma*.<sup>49</sup> ISIS's declaration in June 2014 is seen as illegitimate by many Islamic theorists since the group never officially received approval from the *Umma*.

## Ideology of Al Qaeda and ISIS

This section examines the ideologies of Al Qaeda and ISIS. To provide specificity and a more structured approach, it analyzes both groups on two common ideological facets consistent in the research: uniting and purifying the Islamic community (*Umma*) and waging jihad.

### Al Qaeda's Ideology

A key aspect of Al Qaeda's ideology is to unite and purify the *Umma* under a single umbrella. With a sharp understanding of Sayyid Qutb's vanguard concept, Al Qaeda considered themselves the leader of this effort. At the center of their ideology is the principle of *tawhid*, the oneness of God. For Al Qaeda, *tawhid* compels Muslims to view their religion as one nation united against anti-Islamic aggression on the foundation of compulsory defensive jihad.<sup>50</sup> Al Qaeda considered itself the base of the Islamic *Umma* where Muslims can unite and defend

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<sup>47</sup> David S. Sorenson, “Priming Strategic Communications: Countering the Appeal of ISIS,” *Parameters*, no. 3 (Autumn 2014), 33.

<sup>48</sup> *Ibid.*, 33.

<sup>49</sup> *Ibid.*

<sup>50</sup> US Congressional Research Service, *Al Qaeda: Statements and Evolving Ideology*, by Christopher Blanchard, July 9, 2007.

against US and allied aggression. Their adherence to this doctrine is evident in an internal document published near the time of the group's founding where they pledged to be the "constant enemy" to the world's tyrants and "promote jihad awareness" while preparing and equipping jihadist cadres to oversee the creation of a "unified international jihad movement."<sup>51</sup> This indicated their goal to advance the global jihad movement while stimulating hatred towards the United States and its allies.<sup>52</sup>

Abdullah Azzam created Al Qaeda's original charter and envisioned an organization that would channel the energies of the Afghan mujahidin into fighting on behalf of suffering Muslims worldwide. Based on Sayyid Qutb's ideas, Azzam proclaimed that "every principle needs a vanguard to carry it forward" and that there was "no ideology.... that does not require such a vanguard."<sup>53</sup> Al Qaidah al-Subah (The Solid Base), as Azzam called it, constituted this vanguard. Azzam's *Join the Caravan* circulated in jihadist circles and influenced Osama bin Laden. In the document, Azzam described his desire to establish a base for expanding Islam and proclaimed that the Islamic movement could establish an Islamic society only "through a general popular jihad."<sup>54</sup>

Ayman al-Zawahiri was instrumental to Al Qaeda's efforts to unite the *Umma*. In a dissertation titled, "Loyalty and Enmity," he divided the world into two warring camps similar to Sayyid Qutb: Muslims and everyone else.<sup>55</sup> Zawahiri explained that the current period in Islamic

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<sup>51</sup> "Al Qa'ida's Structure and Bylaws," *The West Combating Terrorism Center*, accessed October 31, 2017, <https://www.ctc.usma.edu/posts/al-qaida-bylaws-english-translation-2>.

<sup>52</sup> Gunaratna, "Al Qaeda's Ideology."

<sup>53</sup> Abdullah Azzam, "Al-Qa'idah al-Sulbah," in Rohan Gunaratna, "Al Qaeda's Ideology," *Hudson Institute*, May 19, 2005, accessed September 14, 2017, <https://www.hudson.org/research/9777-al-qaeda-s-ideology>.

<sup>54</sup> Ibid.

<sup>55</sup> Ayman al-Zawahiri, "Loyalty and Enmity," in Kepel, Gilles, Jean-Pierre Milelli, and Pascale Ghazaleh, *Al Qaeda in its Own Words* (Cambridge: The Belknap Press of Harvard University Press, 2009), 62.

history was “witness to a furious struggle between the powers of the infidels, tyrants, and haughtiness, on one hand, and the Islamic *Umma* and its *mujahid* vanguard on the other.”<sup>56</sup> Zawahiri differentiated between a state of *wala’* (loyalty and devotion between all Muslims) and a state of *bara’* (enmity towards everything outside of Islam.)<sup>57</sup> *Wala’* was the path for uniting Muslims under a single umbrella.

From the beginning, Al Qaeda viewed the caliphate as one of their ultimate, albeit distant objectives, for uniting and purifying the *Umma*. Bin Laden and Zawahiri advised patience and were adamant that broad popular support be solidified before attempting such an endeavor.<sup>58</sup> They advocated a “gradualist approach.”<sup>59</sup> The establishment of the caliphate needed to be timed precisely after defeating the enemies of Islam and securing an Islamic state. Bin Laden and Zawahiri believed the caliphate was the last step for the expansion of Islamic rule and governance, not the first.<sup>60</sup> In 2010, months before he was killed, bin Laden issued a statement to his followers in which he advised against establishing Islamic emirates, much less a caliphate, before the conditions were ready. He cited the Taliban and the Islamic State of Iraq as examples.<sup>61</sup>

Disputes over the caliphate spurred a divide between Al Qaeda’s leadership and Abu Musab al-Zarqawi during the Iraq War. Bin Laden and Zawahiri wanted to force the United States to depart the Middle East and cease support for apostate regimes.<sup>62</sup> In 2001, Zawahiri

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<sup>56</sup> Zawahiri, “Loyalty and Enmity,” 66.

<sup>57</sup> Ibid.

<sup>58</sup> Gerges, *ISIS: A History*, 226.

<sup>59</sup> Ibid.

<sup>60</sup> Ibid.

<sup>61</sup> Osama bin Laden, “Message for General Islamic Nation,” *Director of National Intelligence*, accessed October 17, 2017, <https://www.dni.gov/files/documents/ubl/english/Message%20for%20general%20Islamic%20nation.pdf>.

<sup>62</sup> William F. McCants, *The ISIS Apocalypse* (New York: St. Martin’s Press, 2015), 13.

addressed the caliphate in *Knights Under the Prophet's Banner*, stating that the “hope of the Muslim community lies in the restoration of the caliphate.”<sup>63</sup> He cautioned that it was first necessary to gather broad popular support in “order to fight the battle at the time and in the place it chooses.”<sup>64</sup> Popular support was essential to their larger strategy. He and Al Qaeda’s leadership wanted to coalesce Muslims around the objective of attacking Americans. Establishing the caliphate was not possible without it.<sup>65</sup>

One final aspect of Al Qaeda’s plan to unite the *Umma* is their softer approach toward Shiites. As Zawahiri proclaimed in his 2013 “General Guidelines for Jihad,” “Avoid fighting the deviant sects such as *Rawafidh* [rejecters].... except if they fight the *Ahl as Sunnah* [Sunni Islam] .... Those from amongst them who do not participate in the fight against us and their families, should not be targeted....”<sup>66</sup> Al Qaeda views Shiites as infidels, but potential allies. Congruent with their defensive posture, Al Qaeda believes in fighting Shiites only if they attack Sunnis.<sup>67</sup>

Zawahiri and bin Laden questioned Zarqawi’s indiscriminate targeting of Shiites during the Iraq War. According to Zawahiri, Shiites were forgiven because of their ignorance, therefore, it was senseless attacking them, especially as it could inflame the broader Muslim population.<sup>68</sup> Al Qaeda wanted to appeal to the masses and killing Shiites, they believed, would hinder this effort.<sup>69</sup>

Along with unifying the *Umma*, another central tenet to Al Qaeda’s ideology is the

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<sup>63</sup> Zawahiri, “Knights Under the Prophet’s Banner,” 201-202.

<sup>64</sup> Ibid.

<sup>65</sup> Ibid.

<sup>66</sup> Ibid.

<sup>67</sup> Zawahiri, “General Guidelines for Jihad.”

<sup>68</sup> McCants, *The ISIS Apocalypse*, 13.

<sup>69</sup> Ibid.

pursuit of defensive jihad. The group uses the term to mean “holy war.”<sup>70</sup> A full analysis of jihad is beyond the scope of this monograph, but in a military context it can have two forms: offensive or defensive. Offensive jihad involves attacking the enemy in their territory, while defensive jihad consists of expelling the enemy from Muslim lands.<sup>71</sup> Within Islam, defensive jihad is viewed as obligatory.<sup>72</sup> Abdullah Azzam explained the obligation of jihad as “individually obligatory” when the “enemy enters the land of Muslims” and remains so “until every piece of land that was once Islamic is regained.”<sup>73</sup> This mindset drove Al Qaeda’s pursuit of defensive jihad to eliminate the United States and its allies from Muslim territory.

Osama bin Laden viewed the United States as occupiers of Muslim lands in the Middle East and the focus of defensive jihad. Bin Laden believed that until the United States was expelled, Muslim society would be living in a world of sin.<sup>74</sup> In two declarations titled, “Declaration of Jihad Against the Americans Occupying the Land of the Two Holy Places” and “Jihad Against Jews and Crusaders,” published in 1996 and 1998, respectively, bin Laden emphasized defensive jihad. He appealed to Muslims in stating that the “people of Islam have suffered from aggression, iniquity, and injustice” imposed by “the Zionist-Crusaders alliance and their collaborators.”<sup>75</sup> He invoked Ibn Tamiyyah’s call for jihad against the Mongols to motivate other Muslims to join the movement. Bin Laden specifically mentioned American troops stationed in Saudi Arabia and asserted that under these conditions the primary duty for Muslims

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<sup>70</sup> Rohan Gunaratna, *Inside Al Qaeda: Global Network of Terror* (New York: Berkley Books, 2003), 112.

<sup>71</sup> *Ibid.*, 113.

<sup>72</sup> *Ibid.*

<sup>73</sup> Abdullah Azzam, *Join the Caravan*, in Rohan Gunaratna, *Inside Al Qaeda: Global Network of Terror* (New York: Berkley Books, 2003), 117.

<sup>74</sup> Gunaratna, *Inside Al Qaeda*, 117.

<sup>75</sup> Bin Laden, “Declaration of Jihad Against the Americans Occupying the Land of the Two Holy Places,” 47.

was to push these unbelievers out of the country.<sup>76</sup>

Bin Laden again articulated these points in a 2002 address titled, “Why We Are Fighting You.” To explain why Al Qaeda was fighting the United States, bin Laden simply stated, “Because you attacked us and continue to attack us” and have attacked Muslims in Palestine, stolen wealth and oil from Muslim lands, occupied Muslim countries, and starved Muslims in Iraq.<sup>77</sup> He called on America to stop its oppression and immorality, cease its support of Israel, depart Muslim lands, and cease support to perceived apostate regimes in the Middle East.<sup>78</sup> Until his death in 2011, bin Laden never strayed from this message. As recently as 2010 in an address to his followers, he asserted that Muslims worldwide were being oppressed, stating, “sons of my Muslim nation, you are at a dangerous crossroads and have a rare historic opportunity.... Seize it and break the shackles to become free of the global Zionist oppression.”<sup>79</sup>

Bin Laden expressed his defense of jihad by excoriating Saudi Arabia for writing a letter to the United States titled, “How We Can Coexist.”<sup>80</sup> He mocked the premise of the overture, claiming that the declaration was “proof of defeatism,” and insisted that coexisting with the United States was an impossibility.<sup>81</sup> Defensive jihad was the sole answer for protecting the religion.

Zawahiri also stressed the need for defensive jihad. In *Knights Under the Prophet’s Banner*, he appealed to Islam’s broader population explaining the universal battle between Islam

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<sup>76</sup> Bin Laden, “Declaration of Jihad Against the Americans Occupying the Land of the Two Holy Places,” 47.

<sup>77</sup> Osama bin Laden, “Why We Are Fighting You,” in Raymond Ibrahim, *The Al Qaeda Reader* (New York: Doubleday, 2007), 197.

<sup>78</sup> *Ibid.*, 207.

<sup>79</sup> Bin Laden, “Message for General Islamic Nation.”

<sup>80</sup> Osama bin Laden, “Moderate Islam is a Prostration to the West,” in Raymond Ibrahim, *The Al Qaeda Reader* (New York: Doubleday, 2007), 23.

<sup>81</sup> *Ibid.*

and the United States and its allies. Zawahiri stated that the fundamentalist movement was growing and uniting at a rapid pace under the banner of jihad thirsting to defeat the “heads of the global gang of infidels, the United States, Russia, and Israel.”<sup>82</sup> Zawahiri emphasized the imperativeness of jihad, proclaiming that “no solution [was] possible” without it.<sup>83</sup>

The requirement for defensive jihad allowed Al Qaeda to attack other Muslims. Regularly invoking Allah and other ideological forefathers, such as Ibn Tamiyyah, Zawahiri drove home the divide between Islam and those outside the *Umma*. He cautioned other Muslims from allying with Jews, Christians, and other non-Muslims stating, “For whoever allies with them and enables them against the believers [Muslims], that same one is a member of their faith and community.”<sup>84</sup> This statement was mainly targeted at apostate regimes who befriended the United States.<sup>85</sup>

Similarly, in April 2002, Al Qaeda implored the concept of defensive jihad to justify killing civilians on 9/11.<sup>86</sup> Al Qaeda demonized non-violent responses to US aggression and sought to discredit Islamic scholars who advocated them. The message encouraged Muslims to engage in defensive jihad against a United States that was waging war against them. The central thesis was that there was no categorical prohibition against killing civilians in Islam.<sup>87</sup> 9/11 was a defensive measure designed to protect Muslims from outside aggression.<sup>88</sup> Al Qaeda outlined a bevy of aggressive actions and crimes committed by the United States similar to earlier

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<sup>82</sup> Zawahiri, “Knights Under the Prophet’s Banner,” 194.

<sup>83</sup> Ibid.

<sup>84</sup> Ibid.

<sup>85</sup> Ibid.

<sup>86</sup> Quintan Wiktorowicz and John Kaltner, “Killing in the Name of Islam: Al Qaeda’s Justification for September 11,” *Middle East Policy*, no. 2 (Summer 2003): 80.

<sup>87</sup> Ibid.

<sup>88</sup> Ibid.

statements and questioned the prohibition of killing civilians within Islam.<sup>89</sup> They objected to the notion that those killed on 9/11 were innocents and contended that Islam's prohibition against killing civilians had exceptions.<sup>90</sup>

Al Qaeda's ideology has been consistent since the group's inception. The ideology drives them to unite and purify the *Umma* by serving as the vanguard for the global jihadist movement against a perceived assault on Islam. Al Qaeda considers Muslims to be under attack from the United States and its allies. They view defensive jihad as an obligatory act for every member of the religion.

## ISIS's Ideology

Like Al Qaeda, waging jihad with the goal of uniting and purifying Islam drives ISIS's ideology. They also believe in *tawhid*, the oneness of God, but have no tolerance for those who do not adhere to their example in punctilious detail.<sup>91</sup> At the center of their ideology is the *takfiri* doctrine, the excommunication of Muslims they deem apostates. *Takfiri* served as the basis for killing thousands of people to purify Islam and is central to their ability to expand the caliphate through the occupation of territory.<sup>92</sup>

The *takfiri* issue generated strain between Zarqawi and the leaders of Al Qaeda, who vehemently disagreed with excommunicating Muslims they saw as potential allies. ISIS operationalizes the *takfiri* doctrine and combines it with online videos and other acts of

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<sup>89</sup> Al Qaeda, "A Statement from Qaidat al-Jihad Regarding the Mandates of the Heroes and the Legality of the Operations in New York and Washington," April 24, 2002, accessed October 17, 2017, <https://scholarship.tricolib.brynmaur.edu/bitstream/handle/10066/4796/QAE20020424.pdf?sequence=3&isAllowed=y>.

<sup>90</sup> Ibid.

<sup>91</sup> Graeme Wood, "What ISIS Really Wants," *The Atlantic*, March 2015, accessed August 08, 2017, <http://www.theatlantic.com/magazine/archive/2015/03/what-isis-really-wants/384980/>.

<sup>92</sup> Ibid.

“choreographed violence.”<sup>93</sup> These actions defied traditional thinking within jihadist circles.

As part of their *takfiri* doctrine, ISIS prohibits a host of actions, including selling alcohol or drugs, shaving, wearing Western clothing, voting, and being lackadaisical about calling other Muslims apostates.<sup>94</sup> Under the *takfiri* doctrine, ISIS also targets Shiites, who they identify as *mushrikin* (polytheists), and Muslim regimes, who they believe have placed man-made laws above Sharia.<sup>95</sup> With this mindset, hundreds of millions of Shiites and the leaders of every Muslim country are marked for death.<sup>96</sup>

ISIS divides the world along religious lines. In one of their first *Dabiq* publications, they explained their worldview. Like Sayyid Qutb and Al Qaeda, ISIS divided the world into two camps: the camp of Islam and faith, and the camp of *kufr* (disbelief) and hypocrisy.<sup>97</sup> As a result, ISIS does not support freedom of religion. The group contended that “From amongst the polluted ideologies that afflicted people the entire world over.... is the notion that the people can choose whether to follow the truth or to embark upon falsehood.”<sup>98</sup> The term “truth” meaning their form of Islam, and “falsehood” meaning everything else. They berated others who invoked Muhammad as allowing free choice, claiming that they “portrayed the prophets of Allah incorrectly.”<sup>99</sup>

The caliphate is the foundational aspect for ISIS’s goal of uniting and purifying the *Umma*. ISIS’s ideology aims to establish an Islamic caliphate based on their Salafi-jihadist

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<sup>93</sup> McCants, *The ISIS Apocalypse*, 148.

<sup>94</sup> Wood, “What ISIS Really Wants.”

<sup>95</sup> *Ibid.*

<sup>96</sup> *Ibid.*

<sup>97</sup> ISIS, “The World Has Divided Into Two Camps,” *Dabiq*, June 2014, accessed September 19, 2017, <https://clarionproject.org/docs/isis-isil-islamic-state-magazine-Issue-1-the-return-of-khilafah.pdf>.

<sup>98</sup> ISIS, “It’s Either the Islamic State or the Flood,” *Dabiq*, July 2014, accessed October 19, 2017, <https://clarionproject.org/docs/isis-isil-islamic-state-magazine-Issue-2-the-flood.pdf>.

<sup>99</sup> *Ibid.*

interpretation of Islamic religious law (sharia). They seek to replicate what they deem as Islam's Golden Age, when Muhammad and the Companions conquered vast territory during the 7<sup>th</sup> century.<sup>100</sup> Nearly all of ISIS's decisions follow what it claims is 'the Prophetic Methodology,' consisting of following the example of Muhammad in explicit detail.<sup>101</sup>

The invocation of the Prophetic Methodology legitimized mass killings, slavery, crucifixions, and other forms of ritualized violence practiced within the *takfiri* doctrine. ISIS aims to replicate their understanding of Muhammad's actions. ISIS stated that "Islam is the religion of sound principles providing the perfect foundations upon which the solid structures of justice and glory must be built."<sup>102</sup> One of these principles, according to ISIS, is that everyone "must be fought until they accept Islam or come under a *shar'i* [legitimate] covenant."<sup>103</sup> This mindset compels them to wage war until everyone adheres to their understanding of the Prophetic Methodology.

From its inception, ISIS viewed the caliphate as a prerequisite to establishing legitimacy, uniting Muslims, and expanding their scope of control. They were the first jihadist group to operationalize the concept.<sup>104</sup> ISIS linked the caliphate to decisions on strategy because it allowed them to govern and implement sharia law on their terms. Abu Mohammed al-Adnani, ISIS's first spokesman, made the following statement regarding the caliphate that illustrated its obligatory nature:

Without this condition [the caliphate] being met, authority becomes nothing more than kingship, dominance and rule, accompanied with destruction, corruption, oppression,

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<sup>100</sup> Wood, "What ISIS Really Wants."

<sup>101</sup> Ibid.

<sup>102</sup> ISIS, "The Kafir's Blood is Halal for You, So Shed it," *Rumiyah*, September 2016, accessed October 19, 2017, <https://clarionproject.org/islamic-state-isis-isil-propaganda-magazine-dabiq-50/>.

<sup>103</sup> Ibid.

<sup>104</sup> Gerges, *ISIS: A History*, 229.

subjugation, fear, and the decadence of the human being and his descent to the level of animals.<sup>105</sup>

According to ISIS, Sharia law cannot be implemented without the caliphate. *Hudud*, harsh punishments practiced under Sharia law that ISIS has emphatically implemented, are not permitted without a caliphate. For example, crucifixions and beheadings are sacred requirements only to be executed within the parameters of Sharia law.<sup>106</sup> Moreover, the caliphate enabled ISIS to wage an offensive jihad and forcibly expand into other areas.

Declaring the caliphate allowed ISIS to declare a caliph in Abu Bakr al-Baghdadi. All Muslims were expected to give *bay'a* (allegiance) to the caliph.<sup>107</sup> The declaration enabled ISIS to demand that all other jihadist groups accept ISIS's authority as supreme.<sup>108</sup> With this authority, they ordered Muslims to perform *hijrah* (sacred migration) to the lands under their control and further expand their influence.<sup>109</sup>

ISIS's declaration of the caliphate served as a recruiting tool. It called Muslims to a higher purpose. It imbued recruits with a higher calling and promise of salvation.<sup>110</sup> The caliphate provided Muslims with a sense of belonging and transformation, especially the younger population who felt excluded from Western societies.<sup>111</sup>

ISIS has a particularly contemptuous view of Shiites, whom they believe are *mushrikin*.

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<sup>105</sup> Abu Mohamed al-Adnani, "This is the Promise of God," *Jihadology*, accessed August 9, 2017, <http://jihadology.net/2014/06/29/al-furqan-media-presents-a-new-audio-message-from-the-islamic-states-shaykh-abu-mu%e1%b8%a5ammad-al-adnani-al-shami-this-is-the-promise-of-god/>.

<sup>106</sup> Wood, "What ISIS Really Wants."

<sup>107</sup> Bunzel, "From Paper State to Caliphate."

<sup>108</sup> Ibid.

<sup>109</sup> ISIS, "Hijrah from Hypocrisy to Sincerity," *Dabiq*, June 2014, accessed September 17, 2017, <https://clarionproject.org/docs/isis-isil-islamic-state-magazine-Issue-3-the-call-to-hijrah.pdf>.

<sup>110</sup> Gerges, *ISIS: A History*, 229.

<sup>111</sup> Ibid.

For ISIS, it has been a key aspect to uniting and purifying the *Umma*, and one reason they engage in offensive jihad. ISIS calls Shiites the “Jews of the *Ummah*,” and provides five reasons for declaring *takfir* against them.<sup>112</sup> Among these reasons are that Shiites conduct grave-worshiping, an action violating the concept of *tawhid*. ISIS also claims that Shiites conduct *takfir* against the *Sahabah* (companions of the Prophet Muhammad) because they have determined many of the Companions to be apostates.<sup>113</sup> Additionally, they reject the Shiites “fanatical love of the ‘twelve’ imams.”<sup>114</sup> ISIS considers this intolerable because it gives Shiites attributes equivalent to Allah.

ISIS refers to Shiites as *Rafidah* (rejecters). During the Iraq War, Zarqawi orchestrated a sectarian civil war between Sunnis and Shiites. He declared total war on Shiites in Iraq stating, “The interests of the Crusaders have converged with the desires of their brothers, the hate-filled *Rafidites* [Shiites].”<sup>115</sup> Zarqawi wrote a letter to Al Qaeda’s leadership in Afghanistan, calling Shiites the “insurmountable obstacle, the lurking snake, the crafty and malicious scorpion, the spying enemy, and the penetrating venom.”<sup>116</sup> Invoking Ibn Tamiyyah, Zarqawi considered Shiites to be “where the disease lies.”<sup>117</sup>

Interestingly, both Ibn Tamiyyah and Sayyid Qutb despised Shiites but regarded them as “misguided Muslims.”<sup>118</sup> Tamiyyah never denounced Shiites as unbelievers nor did he believe

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<sup>112</sup> ISIS, “The Rafidah: From Ibn Saba’ to the Dajjal,” *Dabiq*, January 2016, accessed September 17, 2017, <http://clarionproject.org/wp-content/uploads/Issue-13-the-rafidah.pdf>.

<sup>113</sup> Ibid.

<sup>114</sup> Ibid.

<sup>115</sup> Abu Musab al-Zarqawi, in “Leader of Al-Qaeda in Iraq Al-Zarqawi Declares ‘Total War’ on Shi’ites,” *Middle East Media Research Institute*, September 16, 2005, accessed September 14, 2017, <https://scholarship.tricolib.brynmawr.edu/bitstream/handle/10066/4810/ZAR20050914P.pdf?sequence=3&isAllowed=y>.

<sup>116</sup> US Department of State, *February 2004 Coalition Provisional Authority English Translation of Terrorist Musab al-Zarqawi Letter Obtained by United States Government in Iraq*, February 2004, accessed September 15, 2017, <https://2001-2009.state.gov/p/nea/rls/31694.htm>.

<sup>117</sup> Ibid.

<sup>118</sup> Sorenson, “Priming Strategic Communications: Countering the Appeal of ISIS,” 28.

they deserved death. Qutb stated that “Islam does not force people to accept its beliefs, rather it aims to provide an environment where people enjoy full freedom of belief.”<sup>119</sup> He never supported mass murder of Shiites, as ISIS has.<sup>120</sup>

ISIS’s views about the caliphate complement a doctrine of offensive jihad, the other central aspect of their ideology. Abu Umar al-Baghdadi, ISIS’s leader prior to Abu Bakr al-Baghdadi, gave a speech in 2007 stressing offensive jihad. He defined it as “going after the apostate unbelievers by attacking [them] in their home territory, in order to make God’s word most high.”<sup>121</sup> ISIS’s offensive jihad is mostly directed towards Shiites in the region. The group perceives Shiites, starting with Iran, to have expansionist intentions; therefore, fighting them is a necessity.<sup>122</sup>

ISIS’s ideology drives a strategy that emphasizes violent offensive jihad over theology. For example, when questioned about their methods by religious scholars, Abu Mohammad al-Adnani, an ISIS spokesman, shot back with a fiery polemic that described the disdain the group had for “any notion of theological pluralism”:<sup>123</sup>

Do not let their famous reputations deceive you, even if they [religious scholars] have a long history of writing and authorship... they have never left the laps of the *tawaghit* [tyrants], nor marched forth to jihad. They spent their entire lives remaining behind with the women in their rooms, hunting the slipups and mistakes of the *mujahideen*. If they perform *ribat* [doing jihad in defense of Islam], their *ribat* is on the frontiers of Twitter, and if they take part in battle, their battle is in the form of an interview on satellite TV. They have never fired a single bullet for the cause of Allah, nor have they witnessed a single scene or episode on the battlefield with the *mujahideen*.<sup>124</sup>

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<sup>119</sup> Sayyid Qutb, “In the Shade of the Quran,” in Roxanne L. Euben and Muhammad Qasim Zaman, *Princeton Readings in Islamic Thought: Texts and Contexts from al-Banna to Bin Laden* (Princeton, NJ: Princeton university Press, 2009), 146.

<sup>120</sup> Ibid.

<sup>121</sup> Abu Omar al-Baghdadi, “Fa-amma ‘l-zabad fa-yadhab jufa’an,” in Bunzel, “From Paper State to Caliphate.”

<sup>122</sup> Bunzel, “From Paper State to Caliphate.”

<sup>123</sup> Gerges, *ISIS: A History*, 234.

<sup>124</sup> Abu Mohammed al-Adnani, “O Our People,” in Gerges, *ISIS: A History*, 234.

Abu Bakr al-Baghdadi stressed the need for offensive jihad. He proclaimed to Muslims that “Islam was never for a day the religion of peace. Islam is the religion of war.”<sup>125</sup> Baghdadi stated that the Prophet Muhammad was “dispatched with the sword as a mercy to the creation.”<sup>126</sup> Muhammad was obliged to engage in war until the entire world worshipped Allah alone.<sup>127</sup>

Offensive jihad allows ISIS to conquer territory. They strictly adhere to the Prophetic Methodology, and Baghdadi invoked the example set by Muhammad and his Companions. He proclaimed that Muhammad and his successors did not cease war until they “possessed the Earth” and “conquered the East and the West.”<sup>128</sup> Baghdadi warned Muslims of the threats posed by Jews, Christians, and other non-Muslims, and called on a state of perpetual war against them.<sup>129</sup>

ISIS uses offensive jihad to forcibly expand and establish *wilayat* (provinces) across the Middle East, Africa, the Arabian Peninsula, and elsewhere.<sup>130</sup> Their expansionist intentions are intimately tied to their ideology focused on offensive jihad, which seeks to seize land from unbelievers and purify Islam. Moreover, it is fundamentally linked to the caliphate, which cannot function without territory.<sup>131</sup>

ISIS’s ideology remains consistent since Abu Musab al-Zarqawi founded the group. They seek to unite and purify the *Umma* but take a more aggressive approach than Al Qaeda. Their ideology invokes the Prophetic Methodology. They seek to replicate the example set by the

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<sup>125</sup> Baghdadi, “March Forth Whether Light or Heavy.”

<sup>126</sup> Ibid.

<sup>127</sup> Ibid.

<sup>128</sup> Ibid.

<sup>129</sup> Ibid.

<sup>130</sup> ISIS, “Remaining and Expanding,” *Dabiq*, September 2014, accessed October 31, 2017, <https://clarionproject.org/docs/isis-isil-islamic-state-magazine-issue-5-remaining-and-expanding.pdf>.

<sup>131</sup> Ibid.

Prophet Muhammad in agonizing detail. Anyone who does adhere to their interpretation is marked for death under their *takfiri* doctrine. Moreover, their ideology on the necessity of the caliphate drives the group to employ offensive jihad and conquer territory.

## Comparison

In some senses, Al Qaeda and ISIS have similar ideologies focused on uniting and purifying Islam through jihad. Both divide the world into two camps: Islam and everyone else. However, the fundamental ideological differences between the two are clear and linked to their divergent strategies. ISIS practices offensive jihad, while Al Qaeda's jihad is defensive. Both groups view the Shia population with contempt; however, Al Qaeda does not combat them unless they take aggressive action against Sunnis. Killing sprees against Shiites, according to Al Qaeda, are detrimental to the broader jihadist movement. For ISIS, Shiites are disbelievers that must be eradicated, an essential aspect of their *takfiri* doctrine.

The biggest difference lies in the caliphate. For Al Qaeda, the caliphate is a distant goal once US influence is expelled from Muslim lands and the Islamic world is united. Al Qaeda is adamant about establishing popular support before announcing a caliphate. For ISIS, the caliphate was declared first to legitimize the rest of their actions. It was a prerequisite to implementing Sharia law, governing territory, and uniting the Islamic world behind a common cause and inexorably linked to their formulation of strategy.

Al Qaeda has directed most of their aggression towards the United States and its allies, who occupy Muslim lands and commits acts of aggression. Therefore, defensive jihad is an act of salvation for the Muslim world. ISIS, on the other hand, is more focused on apostates and unbelievers in the region. This difference allows ISIS to practice offensive jihad to eradicate populations not adhering to their interpretation of Islam based on the Prophetic Methodology.

## Strategy of Al Qaeda and ISIS

This section examines the strategies of Al Qaeda and ISIS. The principle aim is to gain an understanding of how ideology and strategy are interrelated. It is essential to understand the nexus between strategy aims and the ideology that drives them to fully appreciate the overall goals of Al Qaeda and ISIS.

### Al Qaeda's Strategy

From the beginning, Al Qaeda targeted the United States and its allies. Its strategy reflects this focus. Al Qaeda views the United States and its partners as the source of suffering within the Muslim world; therefore, they pursue mainly a “far enemy” strategy.<sup>132</sup> Osama bin Laden's declaration of jihad against the United States in 1996 reflected Al Qaeda's ideology emphasizing unification of the *Umma* and defensive jihad. In outlining strategic goals, bin Laden cited American occupation of Muslim lands, echoing the sentiments of Ibn Tamiyyah. Bin Laden stated the most important duty for Muslims was to push back against the Americans occupying Muslim territory.<sup>133</sup> According to bin Laden, combining the efforts of all Muslims and ignoring internal divisions was the only way to realize that goal.<sup>134</sup>

In 1998, bin Laden released a fatwa solidifying Al Qaeda's strategic goals.<sup>135</sup> He sought to eliminate the state of Israel, considered to be a “colonial Western outpost” that seized and occupied Muslim lands.<sup>136</sup> Additionally, bin Laden opposed apostate Muslim regimes who

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<sup>132</sup> Daniel Byman and Jennifer Williams, “ISIS vs. Al Qaeda: Jihadism's Global Civil War,” *The National Interest*, February 24, 2015, accessed July 20, 2017, <http://nationalinterest.org/feature/isis-vs-al-qaeda-jihadism%E2%80%99s-global-civil-war-12304>.

<sup>133</sup> Bin Laden, “Declaration of Jihad Against the Americans Occupying the Lands of the Two Holy Sanctuaries,” 49.

<sup>134</sup> *Ibid.*

<sup>135</sup> Osama bin Laden, “Jihad Against Jews and Crusaders,” in Gilles Kepel, Jean-Pierre Milelli, and Pascale Ghazaleh, *Al Qaeda in its Own Words* (Cambridge: The Belknap Press of Harvard University Press, 2009), 53-56.

<sup>136</sup> Byman, *Al Qaeda, the Islamic State, and the Global Jihadist Movement*, 47.

promulgated policies aimed at peace with Israel and better relations with the United States. He targeted them for corruption, profligate spending, and other behavior incongruent with traditional Islam.<sup>137</sup> In a later statement, Bin Laden excoriated their defeatist mentality and for intimating that “one of the foundations of our religion is how to coexist with infidels!!”<sup>138</sup> For example, he rejected Saudi Arabia’s tempered approach to jihad.

Zawahiri asserted these points in *Knights Under the Prophets Banner*, explaining the universality of Al Qaeda’s strategy. In addition to his focus on the United States, Israel, and Muslim apostate regimes, Zawahiri placed emphasis on the United Nations, multinational corporations, and non-governmental organizations who were part of a plot to oppress Muslims worldwide.<sup>139</sup> Zawahiri’s universal message insisted on not leaving a “single area unoccupied” by the jihadist movement.<sup>140</sup> The struggle to establish a Muslim state could not simply be waged as a regional struggle—it demanded a globally unified effort, Zawahiri asserted.<sup>141</sup> He called for unity within the jihad movement, citing it as “half the road to victory.”<sup>142</sup>

Further, in *Knights Under the Prophet’s Banner*, Zawahiri outlined several steps in realizing Al Qaeda’s strategy goals. Each step was consistent with the group’s ideology that emphasized unification of the *Umma* and defensive jihad.<sup>143</sup> He stated that the movement must expose apostate rulers in opposition to jihad. It must make Muslims responsible for defending

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<sup>137</sup> Byman, *Al Qaeda, the Islamic State, and the Global Jihadist Movement*, 48.

<sup>138</sup> Bin Laden, “Moderate Islam is a Prostration to the West,” 23.

<sup>139</sup> Zawahiri, *Knights Under the Prophets Banner*, 193-194.

<sup>140</sup> *Ibid.*, 196.

<sup>141</sup> *Ibid.*, 202.

<sup>142</sup> *Ibid.*

<sup>143</sup> *Ibid.*, 198.

Islam and all its rightful territory.<sup>144</sup> Finally, the movement must adhere to a plan that aimed to establish an Islamic state on lands it could defend within the Muslim world.<sup>145</sup> Only then, Zawahiri asserted, could the movement lead the struggle and eventually restore the caliphate in the example of Muhammad.<sup>146</sup>

Key to understanding Al Qaeda's strategy is their management of affiliate organizations. Historically, Al Qaeda afforded their affiliates flexibility provided they adhered to the group's larger strategic goals. After 9/11, Al Qaeda expanded by formalizing relationships with localized Sunni jihadist entities already operating in North Africa, the Arabian Peninsula, and elsewhere.<sup>147</sup> These groups took on the Al Qaeda label and swore allegiance to the group's senior leadership.

In addition to their sizeable number of fighters and knowledge of local terrain, affiliates contributed to the notion that core Al Qaeda was making a positive difference in the Muslim world.<sup>148</sup> When an affiliate joined Al Qaeda, it was implied they would carry the group's core message by focusing their targeting against the United States and its allies. Affiliates also gave Al Qaeda authority over the broader jihadist movement.<sup>149</sup> Al Qaeda in the Arabian Peninsula (AQAP), Al Qaeda in the Islamic Maghreb (AQIM), and al-Shabaab in Somalia are three of the group's more prominent affiliates. After 9/11, they have successfully launched high-profile attacks, but have not always adhered to bin Laden's strategic vision. AQAP serves as an example of how Al Qaeda has managed its affiliates.

AQAP operates in Yemen. Relations with Al Qaeda's leadership deteriorated in 2010

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<sup>144</sup> Zawahiri, *Knights Under the Prophets Banner*, 198.

<sup>145</sup> *Ibid.*, 198-199

<sup>146</sup> *Ibid.*

<sup>147</sup> Byman, *Al Qaeda, the Islamic State, and the Global Jihadist Movement*, 141.

<sup>148</sup> *Ibid.*, 150.

<sup>149</sup> *Ibid.*, 151-152.

because of the group's failure to adhere to bin Laden's vision.<sup>150</sup> Bin Laden was concerned that AQAP was too focused on Yemen and warned them about any attempt at statehood. He realized that an Islamic state without popular support, that failed to deliver public services demanded by the people, would ultimately collapse.<sup>151</sup> He saw Yemen as a base of operations to project attacks against the United States, not a location for acquiring territory and implementing governance. AQAP failed to heed this advice and seized territory in 2011 after the Arab Spring incited uprisings within Yemen. The group implemented a "hearts-and-minds" approach, but ruled with an iron fist, implementing *hudud* punishments for trivial crimes, consequently alienating local tribes.<sup>152</sup> Within a year the local population turned against them. AQAP's attempt at governance failed.

AQAP is successful in other ways, mainly because they were given a degree of autonomy by Al Qaeda's core leadership. They are the most prominent of the affiliates and largely regarded as the most dangerous to international security and the US homeland.<sup>153</sup> They have global intentions and are more closely connected with the group's senior leadership than any other affiliate.<sup>154</sup> Many of their attacks have been on allies of the United States, in accordance with bin Laden's original vision. They targeted the American homeland on multiple occasions, forcing the United States to escalate counterterrorism operations inside Yemen.<sup>155</sup>

Ayman al-Zawahiri has been the overseer of Al Qaeda's global strategy since bin Laden's death in 2011. In September 2013, he issued guidelines for jihadists echoing sentiments

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<sup>150</sup> McCants, *The ISIS Apocalypse*, 52-53.

<sup>151</sup> Osama bin Laden, "Letter to Nasir al-Wuhayshi," personal correspondence, *The West Point Combating Terrorism Center*, accessed October 22, 2017, <https://ctc.usma.edu/posts/letter-to-nasir-al-wuhayshi-english-translation-2>.

<sup>152</sup> McCants, *The ISIS Apocalypse*, 54.

<sup>153</sup> Byman, *Al Qaeda, the Islamic State, and the Global Jihadist Movement*, 142.

<sup>154</sup> Ibid.

<sup>155</sup> Ibid., 143-144.

similar to the group’s original message that highlight the nexus between ideology and strategy. Regarding military targets, Zawahiri cited America as the priority and wanted to “exhaust her and bleed her to death, so that it... collapse[d] under its own weight.”<sup>156</sup> Once America was bled to death, its grip on Muslims lands would weaken.<sup>157</sup>

Zawahiri also emphasized a systematic propaganda effort. He prioritized creating awareness in the *Umma* about US aggression, elucidating the true meaning of *tawhid*, and uniting all Muslims.<sup>158</sup> He focused the propaganda effort towards educating the jihadist vanguard and fostering awareness among Muslims to mobilize the *Umma* to revolt against apostate regimes in the region.<sup>159</sup>

In June 2017, Zawahiri released another message emphasizing the group’s original ideology and strategy stating the obligatory nature of jihad against those who infringe on Muslim lands.<sup>160</sup> Echoing Abdullah Azzam and bin Laden, Zawahiri reemphasized that the *Umma* was engaged in a global war against the United States and their “partners in crime.”<sup>161</sup> He urged Muslims to form a global alliance and unite against the conspiracy. The United States was still the priority for defensive jihad. Zawahiri also warned that jihad cannot be divided by international boundaries—doing so would diffuse the need for a globally unified effort.<sup>162</sup>

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<sup>156</sup> Zawahiri, “General Guidelines for Jihad.”

<sup>157</sup> Ibid.

<sup>158</sup> Ibid.

<sup>159</sup> Ibid.

<sup>160</sup> Thomas Joscelyn, “Zawahiri Lectures on Global Jihad, Warns of National Boundaries,” *Long War Journal*, June 10, 2017, accessed September 17, 2017, <https://www.longwarjournal.org/archives/2017/06/zawahiri-lectures-on-global-jihad-warns-of-national-boundaries.php>; Ayman al-Zawahiri, “One Ummah, One War on Multiple Fronts,” *Jihadology*, June 9, 2017, accessed October 22, 2017, <http://jihadology.net/2017/06/09/new-video-message-from-al-qaidahs-drayman-al-%E1%BA%93awahiri-brief-messages-to-a-victorious-nation-part-7-one-nation-one-war-on-multiple-fronts/>.

<sup>161</sup> Zawahiri, “One Ummah, One War on Multiple Fronts.”

<sup>162</sup> Ibid.

With Zawahiri's statement, it is clear that Al Qaeda maintains the foundational vision set by Azzam and bin Laden that ignited a global jihadist movement nearly three decades ago. Their ideology focused on uniting and purifying the *Umma* and waging defensive jihad drives a strategy focused on the US and its allies. With Zawahiri still serving as the group's leader, the strategy will unlikely change.

## ISIS's Strategy

ISIS's strategy is also tied to ideology but inextricably tied to the caliphate and *takfiri* doctrine. As a result, they primarily pursue a territorial methodology. Accordingly, the group has focused on what is termed the "near enemy" strategy, emphasizing regional issues, rather than the West.<sup>163</sup>

Territorial control is linked to ISIS's desires for statehood. The success of their caliphate is tied directly to their ability to govern territory. From the beginning, ISIS sought to expand, take over new territory, and then consolidate control to implement Sharia law in accordance with their Prophetic Methodology.<sup>164</sup> ISIS operates its *wilayat* (provinces) through a systematic implementation of bureaucracies and government structures that ensure these provinces are being run in accordance with their understanding of Sharia law.<sup>165</sup>

ISIS's territorial methodology is divided into two stages: pre-territorial control and full territorial control. It is closely nested to what Abu Bakr Naji outlined in the *Management of Savagery*. In the first issue of *Dabiq*, ISIS explained the strategy:

[T]hese phases consist of immigrating to a land with a weak central authority to use as a base where the *jama'ah* [congregation] can form.... Attacks will compel apostate forces to partially withdraw from rural territory and regroup in major urban regions. The

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<sup>163</sup> Byman, "ISIS vs. Al Qaeda: Jihadism's Global Civil War."

<sup>164</sup> Aaron Y. Zelin, "The Islamic State's Territorial Methodology," *The Washington Institute for Near East Policy*, no. 29 (January 2016): 1-24, accessed September 12, 2017, <http://www.washingtoninstitute.org/uploads/Documents/pubs/ResearchNote29-Zelin.pdf>.

<sup>165</sup> *Ibid.*

*jama'ah* would then take advantage of the situation by increasing the chaos to a point leading to the complete collapse of the *taghut* [rebellious] regime in entire areas.... The next step would be to fill the vacuum by managing the state of affairs to the point of developing into a full-fledged state, and continuing expansion into territory still under control of the *taghut*. This has always been the roadmap towards *Khilafah* [caliphate] for the *mujahidin*.<sup>166</sup>

ISIS is less flexible than Al Qaeda regarding strategy, therefore, their provinces operate with less autonomy. *Wilayat* in Libya, Syria, Yemen, and elsewhere have adhered to the two-stage model.<sup>167</sup> ISIS's main priority is expanding the caliphate and targeting the "near enemy," not attacking US targets. Therefore, they focus on local governance and engagement.<sup>168</sup>

The *wilayat* allow ISIS to expand their operational reach and prompt regional conflicts and sectarian divides. Once control is established, they can implement their *takfiri* doctrine to cleanse the community. The group also seeks territories that are ripe for Naji's stage one goal of "vexation and exhaustion." Afghanistan, where ISIS's *wilayat* known as ISIS-Khorasan (ISIS-K) operates, serves as an example. The country has been in a state of perpetual violence, corruption, and economic stagnation for years, leading to a breakdown in political space that provided ISIS opportunities.<sup>169</sup> Afghanistan's lack of governance and security made it an ideal operational target and ISIS capitalized by seizing multiple provinces.<sup>170</sup>

In May 2014, the group released a video titled, "Clanging of the Swords #4," that

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<sup>166</sup> ISIS, "From Hijrah to Khilafah," *Dabiq*, June 2014, accessed September 19, 2017, <https://clarionproject.org/docs/isis-isil-islamic-state-magazine-Issue-1-the-return-of-khilafah.pdf>.

<sup>167</sup> Aaron Y. Zelin, "The Islamic State's Territorial Methodology."

<sup>168</sup> Aaron Y. Zelin, "The Islamic State's Model," *The Washington Post*, January 28, 2015, accessed September 12, 2017, [https://www.washingtonpost.com/news/monkey-cage/wp/2015/01/28/the-islamic-states-model/?utm\\_term=.0794c57c2c5d](https://www.washingtonpost.com/news/monkey-cage/wp/2015/01/28/the-islamic-states-model/?utm_term=.0794c57c2c5d).

<sup>169</sup> Jacqueline Sutherland, "Will ISIS Rebuild in Afghanistan?" *Real Clear World*, April 7, 2017, accessed December 18, 2017, [https://www.realclearworld.com/articles/2017/04/07/ideology\\_afghanistan\\_isis\\_islamic\\_state\\_caliphate\\_112280.html](https://www.realclearworld.com/articles/2017/04/07/ideology_afghanistan_isis_islamic_state_caliphate_112280.html).

<sup>170</sup> Ibid; Lauren McNally, "The Islamic State in Afghanistan: Examining its Threat to Stability," *Middle East Institute*, May 2016, accessed December 18, 2017, [https://www.mei.edu/sites/default/files/publications/PF12\\_McNallyAmiral\\_ISISAfghan\\_web.pdf](https://www.mei.edu/sites/default/files/publications/PF12_McNallyAmiral_ISISAfghan_web.pdf).

demonstrated the tactics used to consolidate territorial control.<sup>171</sup> During their pre-territorial control phase, they collected intelligence with sleeper cells, infiltrated the local population, and created front groups. They studied the local terrain and identified key players and potential enemies. ISIS then operated militarily through the execution of asymmetric warfare, ambushes, sniper attacks, improvised explosive devices (IEDs), car bombs, and suicide bombings.<sup>172</sup>

Once the group consolidated a modicum of control, they instituted a *dawa* (invitation) program focused on building popular support with the local population. Their focus was the youth, the future of the caliphate.<sup>173</sup> ISIS also conducted information operations to elicit support for their cause. After the *dawa* campaign, they implemented *hisba* (accountability) activities. Included in *hisba* was the eradication of alcohol, drugs, cigarettes, and other items associated with sorcery. ISIS destroyed pagan shrines, tombs and artifacts linked to polytheistic practices that violated the principle of *tawhid*.<sup>174</sup> Once *hisba* activities were complete, ISIS began the process of basic governance, introducing taxes, judicial processes, and social services.<sup>175</sup>

In the full territorial control phase, ISIS operated in a more bellicose fashion. They functioned like a state and took an “open warfare posture,” aimed to cleanse the population of those intolerant of their ideology.<sup>176</sup> ISIS employed armored personnel carriers and other heavy weaponry. Their *dawa* campaign greatly expanded and *hudud* punishments were strictly enforced.

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<sup>171</sup> ISIS, “Clanging of the Swords #4,” *al-Furqan Media*, May 17, 2014, accessed October 24, 2017, <http://jihadology.net/2014/05/17/al-furqan-media-presents-a-new-video-message-from-the-islamic-state-of-iraq-and-al-sham-clanging-of-the-swords-part-4/>.

<sup>172</sup> Ibid; Aymenn Jawad al-Tamimi, “Liwa Shuhada’ al-Yarmouk: History and Analysis,” *Syria Comment*, September 18, 2015, accessed October 24, 2017, <http://www.joshualandis.com/blog/liwa-shuhada-al-yarmouk-history-ana-analysis>; Zelin, “The Islamic State’s Territorial Methodology.”

<sup>173</sup> Zelin, “The Islamic State’s Territorial Methodology.”

<sup>174</sup> Ibid.

<sup>175</sup> Ibid.

<sup>176</sup> Ibid.

They commenced work on public works projects, built schools and mosques, put up new electric and phone lines, supported the local economy by industrializing food production, and created road signs welcoming people to their newly acquired real estate.<sup>177</sup> ISIS even established its own currency. The group stated it would “disentangle the *Ummah* from the corrupt, interest-based global financial system.”<sup>178</sup> ISIS wanted to shift the Islamic world away from currencies backed by precious metals, the values of which they perceive to be manipulated by the banking system.<sup>179</sup>

ISIS’s *wilayat* in Libya serves as an example of its territorial mentality. Libya has long served as a haven for jihadist groups to plan attacks on US and allied targets. ISIS, however, took a different approach. They saw the value in seizing territory and implementing state-like functions. ISIS established financial institutions and other government services.<sup>180</sup> They implemented *hudud* punishments and destroyed houses of worship deemed unacceptable. Once they established Sirte as their headquarters, they expanded their government functions and instituted taxes, stocked grocery stores, and employed doctors, engineers, and lawyers to provide services to the people.<sup>181</sup> As Naji prescribed, ISIS also attacked military forces backed by the United Nations to undermine government entities that threatened their power. For example, in January 2016, they attacked a military training center and other checkpoints near Libya’s most essential pieces of oil infrastructure.<sup>182</sup>

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<sup>177</sup> Zelin, “The Islamic State’s Territorial Methodology.”

<sup>178</sup> ISIS, “The Currency of the Khilafah,” *Dabiq*, September 2014, accessed November 1, 2017, <https://clarionproject.org/docs/isis-isil-islamic-state-magazine-issue-5-remaining-and-expanding.pdf>.

<sup>179</sup> *Ibid.*

<sup>180</sup> Jason Pack, Rhiannon Smith, and Karim Mezran, “The Origins and Evolution of ISIS in Libya,” *Atlantic Council*, June 2017, accessed November 2, 2017, [http://www.atlanticcouncil.org/images/publications/The\\_Origins\\_and\\_Evolution\\_of\\_ISIS\\_in\\_Libya\\_web\\_0619.pdf](http://www.atlanticcouncil.org/images/publications/The_Origins_and_Evolution_of_ISIS_in_Libya_web_0619.pdf).

<sup>181</sup> *Ibid.*

<sup>182</sup> *Ibid.*

As part of the group's sustainment efforts to support their long-term strategy, ISIS called on Muslims to perform *hijrah*, a sacred migration based on Islamic tradition that allows followers of Allah (Muslims) to escape the perils of their current society and move to a place of greater safety.<sup>183</sup> *Hijrah* permitted ISIS to advance its nation-building efforts and exert more control than other jihadist groups. Abu Bakr al-Baghdadi specifically called on all Muslims to perform *hijrah* at the time of the group's founding, doing so was obligatory after ISIS declared the caliphate.<sup>184</sup>

Another one of the practices ISIS pursues that supports the sustainment of their long-term strategy is *saby* (taking slaves through war).<sup>185</sup> *Saby* is tied to the group's ability to hold territory. Enslaving large populations, especially young girls and taking them as concubines, is a calculated strategic decision. ISIS believes they are setting these slaves on the path of *tawhid*, thereby establishing the foundation for the purification of Islam and the future of the caliphate.<sup>186</sup>

Overall, ISIS operates its territory systematically. Their territorial methodology is consistent with their ideological beliefs tied to the caliphate. The caliphate provided the requisite authority for establishing Sharia law and implementing governance in accordance with the Prophetic Methodology.

ISIS contends it is apolitical and does not recognize borders or international law. They criticize Muslim regimes that negotiate and form alliances or sign treaties with the United States.<sup>187</sup> Recognizing borders and international law would inhibit and contain the spread of the

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<sup>183</sup> Guy Fricano, "Honor in Hijrah as Expressed by the Islamic State," *Small Wars Journal*, March 14, 2017, accessed September 19, 2017, <http://smallwarsjournal.com/jrnl/art/honor-in-hijrah-as-expressed-by-the-islamic-state-0>.

<sup>184</sup> Baghdadi, "March Forth Whether Light or Heavy."

<sup>185</sup> ISIS, "Slave Girls or Prostitutes," *Dabiq*, May 2015, accessed September 17, 2017, <https://clarionproject.org/docs/isis-isil-islamic-state-magazine-issue+9-they-plot-and-allah-plots-sex-slavery.pdf>.

<sup>186</sup> Ibid.

<sup>187</sup> Wood, "What ISIS Really Wants."

caliphate, which they believe is global, a core tenant of their ideology. For example, the group castigates the Taliban for being a nationalist movement with political ambitions.<sup>188</sup>

ISIS targets the legitimacy of governments in Saudi Arabia, Pakistan, Afghanistan, and elsewhere by attacking their Shiite populations, an ideological aspect tied to the group's broader strategy. For example, in June 2015, they attacked Shiite mosques in eastern Saudi Arabia, forcing the Saudi government to protect their Shiite population, thereby exposing their hypocrisy and illegitimacy.<sup>189</sup> When Abu Bakr al-Baghdadi announced the establishment of a *wilayat* in Saudi Arabia, he first emphasized attacks on Shiites as part of a wider strategy to threaten Saudi Arabia's legitimacy.<sup>190</sup> ISIS also accuses the Saudis of discouraging Muslims from jihad.<sup>191</sup>

ISIS's strategy is connected to an ideology that seeks to unite and purify the *Umma* and wage offensive jihad. The caliphate compels a strategy that seizes territory in a systematic fashion. Therefore, ISIS is more centralized in how they oversee their *wilayat*. Their two-stage process of pre-territorial control and full territorial control does not allow the same latitude that Al Qaeda's affiliates operate with. Territory, for ISIS, must be first acquired and then rigidly overseen if the caliphate has any chance of enduring.

## Comparison

Al Qaeda and ISIS have divergent strategies tied to ideological differences. The centerpiece of Al Qaeda's strategy is the United States and its allies, a consistent message since the group's inception. The United States is the source of Islam's suffering and must be attacked.

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<sup>188</sup> ISIS, "The Jihad in East Asia," *Rumiyah*, May 2017, accessed September 17, 2017, <https://qb5cc3pam3y2ad0tm1zxuhho-wpengine.netdna-ssl.com/wp-content/uploads/2017/08/Rumiyah-ISIS-magazine-10-issue.pdf>.

<sup>189</sup> Aaron Zelin, "The Islamic State's Saudi Chess Match," *The Washington Institute for Near East Policy*, June 2, 2015, accessed September 12, 2017, <http://www.washingtoninstitute.org/policy-analysis/view/the-islamic-states-saudi-chess-match>.

<sup>190</sup> Ibid.

<sup>191</sup> ISIS, "Kill the Imams of Kufr," *Dabiq*, January 2016, accessed September 17, 2017, <http://clarionproject.org/wp-content/uploads/Issue-13-the-rafidah.pdf>.

Al Qaeda practices defensive jihad to unite the Muslim world and expel US influence from Islamic territories. Therefore, its strategy focuses on the “far enemy.” As a secondary mission, the group targets apostate regimes who ally with the United States and seek their support. With this strategic vision, Al Qaeda provides its affiliates more autonomy as long as they orient their jihadist efforts towards striking the United States and their partners.

ISIS is focused on the “near enemy.” Their desires for territorial control are tied to the caliphate, their foundational obligation for purifying and uniting the Islamic world. ISIS intends to operate as a fully functioning state. Al Qaeda wants their affiliates to focus on forming bases of operations in the Muslim world to serve as staging grounds for attacks on the United States and its allies. ISIS, on the other hand, ensures their affiliates acquire territory, implement governance and Sharia law on their terms, and create sectarian divides with other deviant sects, to expand the caliphate. With territorial control, ISIS can implement its *takfiri* doctrine and root out those who do not conform. In contrast to Al Qaeda, ISIS’s strategy, therefore, does not permit them to allow the same level of flexibility for their *wilayat*.

Although ISIS takes a systematic approach to its territorial methodology, including initially building popular support during the *dawa* campaign, they have no desire to negotiate about the correctness of their practices. Once you are inculcated with their ideology, you either conform, or die. Al Qaeda, as reflected by bin Laden, and now Zawahiri, is ambivalent towards any attempt at statehood. Repeated failures by AQAP, AQIM, and al-Shabaab in Africa all reinforce this point. Al Qaeda insists on uniting the Muslim world before attempting statehood, something they feel can be accomplished by orienting their focus on the United States and its allies.

## Conclusion

Al Qaeda and ISIS have fundamental differences that are inadequately addressed by the dominant literature on the subject. Consequently, many Americans, including the US military,

perceive the groups to be more similar than they are. This has contributed to a poor understanding of the threat they pose to the world while hindering our ability to anticipate their future actions. It is clear that ideological differences have an implicit effect on the diverging strategies pursued by each group. Ideology is the foundation for their actions. It provides a vision and end state for which they are uncompromising in attaining.

Their differences on the caliphate lie at the heart of their differences on strategy. For ISIS, declaring the caliphate was the first obligation for galvanizing the rest of the movement. It legitimized their ability to conquer territory and institute Sharia law in accordance with their Prophetic Methodology. Al Qaeda, conversely, sees the caliphate as a distant goal. They stress the need for building wider support in the Muslim world to expel US influence from Muslim lands.

Al Qaeda focuses its strategy on the United States and its allies, the “far enemy,” who have occupied Islamic lands and oppressed Muslims. They view defensive jihad as an act of salvation to remove these threats from the Muslim world. Bin Laden and Zawahiri never wavered from this strategy. They implored their affiliates to operate in Muslim communities that could serve as bases for projecting large attacks against US and allied targets. Al Qaeda has cautioned against territorial control that oppresses the local population, claiming that it would only detract from the group’s vision of defeating the United States and its partners while uniting Muslims.

ISIS is more concerned with the “near enemy,” regional targets like Shiites and other disbelievers in the Middle East. The group cannot function and nation-build without territory, a prerequisite for the caliphate. Additionally, they do not respect international borders or laws in their pursuit of real estate, doing so would disallow the expansion of the caliphate. With territory, they bureaucratically implement governance and provide services for their populations in systematic pre-territorial and full territorial control phases. Territory allows the group to institute their *takfiri* doctrine and purify Islam.

Both Al Qaeda and ISIS focus on uniting and purifying the *Umma* while engaging in jihad. Each separates the world into two camps: Islam and everyone else. Al Qaeda practices

defensive jihad and envisions itself as a vanguard oriented against US and allied aggression serving to unite the jihad movement under a single umbrella. ISIS, on the other hand, practices offensive jihad, manifested in the group's *takfiri* doctrine. They seek to eradicate everyone, especially Shiites, who does not support their ideology. Al Qaeda considers this detrimental to the overall global jihadist movement, where popular support is needed to endure.

For operational planners, the information provided can help develop operational approaches better suited to marginalize the effects of Sunni jihadist groups. Attempting to determine the future actions of Al Qaeda and ISIS should begin with a rigorous examination of their ideologies. Future Sunni jihadists will likely possess similar ideologies, and model their strategies as such. For example, pairing ISIS's ideology with their past military actions may enable planners to foresee their operational goals and forecast what country the group may attempt to seize territory in.

Al Qaeda and ISIS will continue to operate globally and pose a threat to the United States and international security. With the loss of territory in Iraq and Syria, ISIS may broaden their strategy to include more attacks on US targets. Al Qaeda remains focused on the United States under Zawahiri's leadership. The actions of Al Qaeda and ISIS have inspired a generation to carry the torch of global jihad. Without continuous study and debate of the ideologies that drive these groups, we will struggle to portend their future actions.

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