

Redefining Jihad in Local Context: From the Rise of Islam to the Islamic State

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Introduction

Today, the West looks at the Islamic State with horror and fear. Not only has the Islamic State promoted the call of every Muslim to perform *jihad*, a violent struggle, but, the Islamic State has expanded the individual duties of every Muslim to perform *hijra*, emigration to the Islamic State, while also reviving the practices of slavery. The Islamic State has broken from Osama Bin Laden's core al-Qaeda and actually responded to their local context more vigorously and in a more radical manner. As Western powers struggle with the challenges of the Islamic State, it is important to recognize that the Islamic State and its leaders understanding of the duties of every Muslim is a violent response to the West in the Middle East, local context and the circumstances of the Middle East itself and years of internal frustrations. Using Islamic doctrine to justify their behaviors, the Islamic state is quickly adapting to meet its own needs and thus redefining what it means to be a Muslim.

While adapting to contextual factors and reinventing itself, the Islamic State is also reinventing their perception of the West. Al-Qaeda's attacks on the United States on September 11, 2001 specifically targeted political and economic institutions of the United States. For Bin Laden, the real threat to Islam was the threat of American policies and economic policies. However, while the al-Qaeda organization has expanded its ideologies about the concept of what it means to be a Muslim over the last twenty years, the organization has also changed its perception and definition of its enemies. In a recent attack conducted by the Islamic State against Paris on November 13, 2015, the Islamic State targeted nightclubs, cafes, sports stadiums and concert halls. For the Islamic State,

the real threat of the West goes beyond the political and economic institutions of the West, but really encompasses all of Western culture. So while al-Qaeda and the Islamic State have sought self-definition they have also redefined their understanding of the West.

To better understand how Muslims see themselves in the context of social, political and religious violence in the Middle East requires an analysis of how terrorist organizations like al-Qaeda and the Islamic State have interpreted the individual duties or obligations of a true Muslim, and specifically the individual obligation to perform jihad over time. This requires, first an analysis of what it meant to be a true Muslim in Muhammad's time. In my First Chapter I will analyze the original texts, *Qur'an*,¹ *fatwas*² and *hadith*³ of the first generation. I will offer an overview of tribal life in the Arabian Peninsula where select Muslims performed jihad to spread the Islamic faith. I will then show how, in the fourteenth century, jihad is redefined when Muslim Scholar Ibn Taymiyya (d.1328) describes jihad as an act done for protection and not expansion.

In my second chapter I will look to modern sources, tracking the literature of Osama Bin Laden's al-Qaeda to demonstrate the progression of the ideology of the individual to perform jihad. Looking at Bin Laden's right hand man Ayman al-Zawahiri's treatise *Jihad, Martyrdom, and the Killing of Innocents*, and Bin Laden's "Declaration of War Against the Americans," written in 1996 I will show that for al-Qaeda jihad was the

¹ The Qur'an is considered the literal word of God and the primary source of religious doctrine for Muslims.

² According to Euben and Zaman, a "fatwa a non binding legal opinion issued by a jurisconsult." Full bib info see Euben, Roxanne Leslie, and Muhammad Qasim Zaman, eds. *Princeton Readings in Islamist Thought: Texts and Contexts from Al-Banna to Bin Laden*. Princeton Studies in Muslim Politics. Princeton: Princeton University Press, 2009, 473.

³ According to Euben and Zaman a "hadith is a report concerning the words and deeds of the Prophet Muhammad, collected and recorded in the centuries following Muhammad's death." Full bib info see Euben and Zaman, *Princeton Readings in Islamist Thought*, 474.

most important obligation of every Muslim. Continually tracking al-Qaeda literature, I will look at literature produced after September 11, 2001 and the U.S. invasion in Iraq in 2003 to highlight that a shift in ideology occurred an en emphasis on the formation of the caliphate as the primary individual duty of the Muslim began to emerge. Internal leadership disputes were prevalent. I will analyze the correspondence between Zawahiri and al-Qaeda leader in Iraq, Abu Masab al-Zarqawi which took place between 2004 and 2005, to show that Zarqawi was more interested in the individual duty to establish the caliphate and less concerned with fighting the West. ⁴

In my Third Chapter, I will interpret the Islamic State's literature and specifically a series of magazines entitled *Dabiq* that are produced by the group regularly to identify the Islamic State's more vigorous call for the individual to establish the caliphate and emigrate to the Islamic State. By examining these texts, produced over a span of about twenty years, I will show that that the concept of the individual duties of a Muslim, and especially the individual duty of a Muslim to perform jihad has changed over time.

Lastly, acknowledging that al-Qaeda and the Islamic State's ideology regarding the individual duty of every Muslim to perform jihad has changed and expanded over time, I will suggest that these changes reflect both a response to local, political context and also a continued frustration within the Islamist community after centuries of failure and political, religious and social exclusion. The shifts in ideology reflect a response to local context, and specifically the presence of the Western powers in the Middle East. Tracking how al-Qaeda and now the Islamic State have harnessed and adapted the ideology of the individual duties of every Muslim demonstrates how al-Qaeda and the

⁴ Ibid., 436–459.

Islamic State have responded with violence consistently. While the presence of the United States in the Middle East in the First Gulf War or in Iraq in 2003 might have been necessary, American troops in these regions has only encouraged al-Qaeda to adjust their call of every Muslim to perform jihad, and responded with violence. Not only does the progression of how al-Qaeda and the Islamic State have used the ideology of what it means to be a Muslim demonstrated that the organization is adapting and trying to find a place in modern context, but it also reflects years of frustration and failures by the Muslim Brotherhood and the Arab Spring. Interestingly, the call to jihad has remained constant. While the Islamic State has expanded the individual duties of a Muslim further, both organizations have maintained a call to jihad. Also, responding to their local context, al-Qaeda and the Islamic State's call for jihad reflects a constant call for more violence. This violence is only contributing to the chaos and unrest in the Middle East.

Notably, the ideological changes within al-Qaeda and the Islamic State regarding the individual duties of a Muslim to perform jihad demonstrates the importance of doctrine. While tracking the ideological changes of both al-Qaeda and the Islamic State, each group leans on historical texts, the Qur'an and religious sources to justify their interpretations and behaviors. So, while the radical groups might be responding to local context and threats, they are responding with violence that they have justified using religious, sacred texts. The significance of doctrine and disputes over the interpretation of doctrine differentiate the Islamic State from Bin Laden's core al-Qaeda.

While Islamic Scholars tend to place special emphasis on the leadership within al-Qaeda and the Islamic State as a means for justifying ideological changes and interpretations of the sacred texts especially regarding the duties of a Muslim, I would

like to suggest that these ideological changes about the duties of a Muslim are more a response to cultural context than to any specific leader. Cole Bunzel, for example, uses the progression of leadership in his “From Paper State to Caliphate,” to demonstrate the evolution of the Islamic State. And although I am using the same model, looking mainly at the literature produced by top leaders in the al-Qaeda organization and the Islamic State, I have relied heavily on this literature because it is what is circulated and available. However, unlike Bunzel, who places special emphasis on the leader as the driver in ideological changes, I am suggesting that these ideological changes are the result of another outcome, and actually the result of changes in local context that caused the ideology of the individual duty of a Muslim to change.

CHAPTER 1

The Individual Duties of a Muslim from the First Generation to al-Qaeda

Introduction

The introduction of Islam to the Arabian Peninsula was meant to bridge divisions among people, and bring peace to a society characterized by tribal warfare and violence. Today, however, thousands of years later, the Middle East is still in conflict. While ideologically, religiously and culturally, Christians, Jews and Muslims alike view the globe and their intended duties differently, how do Muslim's view their duties with respect to violence?⁵ Understanding the role of Islam in modern conflicts and those that have arisen in the Middle East among radical Muslim organizations requires a study of past literature and the historiography of the duty of a Muslim. An analysis of the Qur'an, the literal word of God, *fatwas* and *hadith* can shed light on Muslims conceptions of their duties.

During Muhammad's time there were two individual duties that all Muslim's had to perform in order to be considered true Muslims, one was paying *zakat* and the other was praying five times a day.⁶ Since Muhammad's time the individual duties of every Muslim have expanded to include five obligations or known as the five "Pillars of Islam." These obligations or duties include accepting that there is no God but God, making pilgrimage (*hajj*) to Mecca if able, praying five times a day, fasting during Ramadan and paying *zakat*. Along with the five pillars of Islam, many Islamic groups have expanded

⁵ Rahman, Fazlur. *Islam & Modernity: Transformation of an Intellectual Tradition*. Repr. Publications of the Center for Middle Eastern Studies 15. Chicago ;London: Univ. of Chicago Press, 2002, 19.

⁶ According to Euben and Zaman, the *zakat* is "the Islamic alms-tax paid annually on one's accumulated wealth; one of the five "pillars of the faith." See *Princeton Readings in Islamic Thought* Glossary, Euben and Zaman, *Princeton Readings in Islamist Thought*, 478.

the concept of the individual duties of every true Muslim to include an individual duty to wage jihad and to establish a caliphate that emulates Muhammad's society.⁷ Extremist groups that argue that Muslim's have an individual obligation to perform jihad have redefined what it means to be a Muslim.

Jihad means, to "strive" or "struggle."⁸ In the Qur'an and hadith, jihad primarily refers to warfare in the service of Islam, or "holy war." However, the concept of jihad can be interpreted in many ways. Originally, there were two types of jihad. Jihad was viewed as the internal struggle to live according to the faith and the external struggle to promote the faith of Islam and encourage all mankind to convert to Islam. Today, extremist groups like al-Qaeda and the Islamic State have harnessed the idea of this external and internal struggle, using the historic sources to leverage their claims and explain their altered concept of the struggle or jihad. Al-Qaeda and the Islamic State have responded to their local, political contexts by suggesting that it is the individual duty of every Muslim to perform jihad.⁹

Because jihad refers to a struggle, jihadist ideology can be closely tied to the warrior and their role in the fighting. Not only does jihad ideology promote outward fighting in the way of the faith, it also praises the martyrs, those who die for Islam.¹⁰ The historical texts of the Qur'an and hadith illustrate the relationship between the martyr and the call or obligation of jihad. Indeed, an understanding of why certain groups have

⁷Slick, Matt. "The Five Pillars of Islam." *CARM - The Christian Apologetics & Research Ministry*. Accessed April 1, 2016. <https://carm.org/five-pillars-of-islam>.

⁸ Ibrahim, Raymond. *The Al Qaeda Reader*. 1st ed. New York: Doubleday, 2007, 1-20.

⁹ Ibrahim, *The Al Qaeda Reader*, 1-20.

¹⁰ Bonner, Michael David. *Jihad in Islamic History: Doctrines and Practice*. Princeton: Princeton University Press, 2006, 3.

expanded the individual duties of the Muslim to include jihad requires a deep understanding of early Islamic texts and the context in which Islam arose.¹¹

Today both Islamic and Western scholars struggle to decipher the meanings of the complex Islamic texts, especially the Qur'an and *hadith*, to make sense of the violence in the Muslim world. A better understanding of the concept of the duty of jihad in pre-modern and in modern contexts can help to make sense of the violence in the modern world and to explain what it means to be a Muslim in this modern context of violence. Since the time of the Prophet Muhammad, what has it meant to be a true Muslim? What does it mean to be a Muslim in the modern world? And, how has the need for the individual duty of a Muslim to perform jihad changed over time? Much like Muslims, who look to the past for answers, an analysis of the primarily Islamic literature can offer a progression of the Muslim's duty to perform jihad.

As noted, certain groups like al-Qaeda and the Islamic State practice a rigorous interpretation of the Islamic texts and use these texts to justify trying to recreate a society in conformity with Muhammad's time.¹² They seek continuity with the time of Prophet Muhammad, and, specifically they look to expand the concept of the individual duties of a Muslim to include the duty of jihad.¹³ As *Princeton Readings in Islamic Thought* authors Euban and Zaman note, extremist groups "aim at restoring the primacy of the norms derived from these fundamental texts in collective life, regarding them not only as an expression of God's will but as an antidote to the moral bankruptcy inaugurated by

¹¹ *ibid*, 1–10; Ibrahim, *The Al Qaeda Reader*, i–20; Rahman, *Islam & Modernity*, 1–25; Peters, Rudolph. *Jihad in Classical and Modern Islam: A Reader*. Princeton Series on the Middle East. Princeton: Markus Wiener, 1996, 1–20

¹² Euban and Zaman, *Princeton Readings in Islamist Thought*, 1–10.

¹³ Indeed, as scholar Richard Bonner notes, "Muslims have often expressed a strong desire for continuity with their past." Zaman and Euban further emphasizes the past for Islamist groups, saying, "we take Islamism to refer to contemporary movements that attempt to return to the scriptural foundation of the Muslim community." See *ibid*.

Western cultural dominance from abroad.”¹⁴ Comparing the Qur’an and hadith of Muhammad’s time regarding the practices of jihad, with the practices of jihad articulated in the modern literature and ideology for groups like al-Qaeda and the Islamic State, will show that the concept of what it means to be a Muslim and the individual requirements for every Muslim to practice jihad has evolved over the course of history. This evolution of ideology is at the heart of what justifies the contention and violence within the Muslim community today.¹⁵

Jihad in the Earliest Sources

To understand the role of jihad and martyrdom in the early years of Islam, it is important to acknowledge the historical, social and political context of the pre-Islamic society, the groundwork in which the Islamic faith arose, and how these contextual factors influenced the stories and teachings told in Qur’an. Islam arose in a conflicting tribal society characterized by constant warfare. The tribe was organized in a social hierarchy structure, and tribal economics consisted of both farming and trading. Life was centered around the Ka’ba,¹⁶ which functioned as the center of religious and economic discourse. At the Ka’ba goods were traded and exchanged and idols associated with natural elements like water, air and earth were worshipped. Noted in the apocalyptic literature and poetic rhetoric of the seventh century, not only was warfare a central element of tribal life but the war hero was also highly praised and admired in the

¹⁴ Ibid., 4.

¹⁵ Bonner, *Jihad in Islamic History*, 1–20; Euben and Zaman, *Princeton Readings in Islamist Thought*, 1–10.

¹⁶ According to Euben and Zaman, the “Ka’ba is the most famous sanctuary in Islam, located within the great mosque in Mecca. It is the direction that Muslims face in daily prayer.” Euben and Zaman, *Princeton Readings in Islamist Thought*, 475.

community.¹⁷ Indeed, the war hero was idealized and praised for actions of courage that brought safety to his tribe. It was under these circumstances that Muhammad claimed the word of God was revealed to him by an angel Gabriel.¹⁸

The introduction of Islam into a context of tribal warfare and praise for the war hero meant that the Islamic practices of jihad, and waging war were merely a continuation of a pre-existing tribal normal. The primary Islamic community was established in Mecca between 610 and 622. Guided by prophet Muhammad, the people lived relatively peacefully. However, facing tribal persecution in 622, Muhammad was forced to flee Mecca.¹⁹ He journeyed from Mecca to Medina, a trip that would become known as the emigration or hijra.²⁰ Indeed, tribal persecution and political conflict required Muhammad to assume a religious, political and military leadership. He had a responsibility to his followers to act as a religious guide, but he also has a duty to serve as a political leader.²¹ After fleeing to Medina, the later part of Muhammad's career was surrounded by conflict and violence. Muhammad waged nineteen military campaigns during this time, hoping that in conquering territory he would expand his messages and the Islamic faith. Muhammad faced much persecution and had to act defensively to protect his kingdom too. Indeed, it was under these circumstances of volatility and violence that Islam became a formalized religion with structured beliefs and common practices.²²

¹⁷ Bonner, *Jihad in Islamic History*, 7–9.

¹⁸Peters, F. E. *Muhammad and the Origins of Islam*. SUNY Series in Near Eastern Studies. Albany: State University of New York Press, 1994, 1–20; Bonner, *Jihad in Islamic History*, 1–20.

¹⁹ Ibid, 39.

²⁰ *Hijra* is the emigration from Mecca to Medina that the Prophet made in 622. Euben and Zaman, *Princeton Readings in Islamist Thought*, 474.

²¹ Bonner, *Jihad in Islamic History*, 39.

²² Ibid., 35–55.

During Muhammad's time the concept of jihad referred to external and internal struggles. External jihad was the struggle or fight waged against the unbelievers, to spread the way of Islam. External jihad or offensive jihad was a collective obligation meaning not everyone had to perform external jihad and the external jihad was waged by only a selection of warriors on behalf of the whole community. External jihad, was considered an offensive jihad, as it was the fighting to promote the faith; a collective duty called (*kifya*) done for the community and performed in response to political and military threats.²³ As the Qur'an notes, "as Muhammad is said to have said, "I have been sent to the human race, in its entirety, and I have been commanded to fight the people (or the unbelievers) until they testify: 'There is no god but God, and Muhammad is the Messenger of God.'"²⁴ Additionally, the internal jihad, which is considered to be the "greater of the two struggles," is called (*fard'ayn*) and was the individual duty to fight the greater demons within oneself.²⁵ The internal struggle embodied a sense of duty or obligation to struggle internally with oneself, to reject worldly pleasures in pursuit of leading a life in on path of Allah.

During Muhammad's time, the fighter, one who participated in the external jihad against the enemy and the martyr, one who died while participating in the external jihad was praised. If his intentions were pure, and in the way of God, he was praised and rewarded for his fighting. Regarding the role of a valiant warrior or martyr, according to God and the Prophet, the Qur'an declares, "Who is it that truly fights in the path of God?" To which comes the answer: 'Whoever gives so that the Word of God may be

²³ Ibrahim, *The Al Qaeda Reader*, i-20.

²⁴ Bonner, *Jihad in Islamic History*, 49.

²⁵ Ibrahim, *The Al Qaeda Reader*, i-20.

highest is fighting in the path of God.”²⁶ Jihad and martyrdom are depicted in the early teachings of the Prophet and the Qur’an, reflecting a conquest society characterized by tribal warfare that praised the warrior and those that fought in the way of the new religion.²⁷

Jihad in the Middle Period

The origins, ideology, and practice of jihad and martyrdom have evolved over the course of history. There are two distinct moments of ideological change in the historiography of the concept of the individual Muslim duty to engage in martyrdom and jihad, the first change occurred in the eighth century and the second change occurred in the fourteenth century with the introduction of an Islamic scholar Ibn Taymiyyah. Since its introduction, Islam continued expanding rapidly in the midst of a “conquest society.”²⁸ As such, the faith became scattered over a large territory, nestled in small towns and large cities.

In the eighth century as Muslims began to scatter and the concept of a conquest society continued, jihad became more solidified in its practice. One reason for such solidification was that it was a necessary response to tribal circumstances. The rapid growth in the Muslim population, starting in the Arabian Peninsula and spreading to the surrounding areas resulted in a series of wars in the seventh and eighth centuries between the Arab Muslims and the Byzantine Empire, the Eastern Roman Empire. In response to

²⁶ Bonner, *Jihad in Islamic History*, 51.

²⁷ Ibid., 30–55; Bonney, Richard. *Jihād: From Qur’ān to Bin Laden*. New York: Palgrave Macmillan, 2004, 1–20; Peters, *Muhammad and the Origins of Islam*, 1–20.

²⁸ Bonner, *Jihad in Islamic History*, 84.

this localized fighting, the call to jihad became more prevalent.²⁹ The eighth century doctrine diverged from the doctrine of Muhammad's time, placing more emphasis on the call to perform offensive jihad, the act of military conquest to spread the Islamic traditions. The doctrine harped on the first generation and the life of the prophet as both a moral and civil guide. Through the example of the Prophet Muhammad and his first generation, Muslims strove to convert others to the way of Islam. Through such effort and struggle, one might gain religious merit and in conducting warfare strive to perform God's will. ³⁰ The concept of the duty to perform jihad continued to evolve in the fourteenth century.

In the fourteenth century, the introduction of Ibn Taymiyyah's works on jihad also exemplified a change in ideology from the first generation practices. Taymiyyah was a scholar, judge and historian who wrote about jihad in the fourteenth century. Ibn Taymiyyah followed the Hanbali school of Sunni Islam and he wrote during a time when Islam was under threat from the Mongols. Responding to his local context, one in which Islam faced external threats from foreign enemies, Taymiyyah developed the ideology of a defensive jihad, a jihad performed as a response to the external threat of the Mongols. While previously, in the eighth century jihad was waged for the spreading of Islam, now jihad was waged in response to the threat to Islam. His ideology demonstrated a necessity for all able Muslims to wage jihad. And, he preached that those Muslims that did not wage jihad or practice the fundamental beliefs of a true Muslim would become legitimate targets of jihad. Indeed, Taymiyyah stressed the utmost importance of jihad as an individual duty among all Muslims and not a collective duty performed by a select few.

²⁹ Ibid., 168.

³⁰ Ibid., 10.

He brought the concept of the individual obligation to perform jihad by every Muslim to the forefront.³¹

Jihad in Modern Articulations

In a more modern context, radical groups such as al-Qaeda and the Islamic State have taken the fundamental scripts that identify the individual Islamic duty to perform jihad and that highlight and encourage martyrdom and utilized these sources to bring “awakening” and violence to the Islamic world. Al-Qaeda was founded by an Islamic radical Osama Bin Laden in 1988 who, in responding to the Soviet occupation of Afghanistan in the 1980s, called every Muslim to perform their individual duty and wage jihad.³² Al-Qaeda and Bin Laden were also responding to the First Gulf War of 1990 in which Iraq occupied Kuwait. During this time the United States set up troop bases and camps in Saudi Arabia. Operating within Saudi Arabia, American forces worked to expel Iraqi forces from Kuwait.³³ Bin Laden and militant jihadist groups saw this occupation of Saudi Arabia, home of Mecca and Medina, the “Two Holy Places,” as a threat to Islam and a requirement for jihad.³⁴ According to Bin Laden, the U.S. occupation in Saudi Arabia required that all Muslim’s respond by waging jihad against the West. Bin Laden was also furious at Saudi Arabia for allowing the U.S. to set up bases in Saudi Arabia and

³¹ Bonney, *Jihad from Qur’an to bin Laden*, 1-20.

³² Al-Qaeda members often refer to their organization as the “base of jihad.” For more information about the formation of the al-Qaeda organization see Euben and Zaman, *Princeton Readings in Islamist Thought*, 425–39.

³³ “Gulf War - New World Encyclopedia.” http://www.newworldencyclopedia.org/entry/Gulf_War . April 7, 2016.

³⁴ Miller, Flagg. *The Audacious Ascetic: What the Bin Laden Tapes Reveal about Al-Qa’ida*. London: Hurst, 2015, 370.

cooperating with Americans. Bin Laden responds to his local context, promoting jihad and calling for more violence.

Al-Qaeda was originally made up of former Afghani fighters who had fought alongside Bin Laden against the Soviet Union in Afghanistan in the 1980s. In Afghanistan, militant fighters had successfully driven a major super power, the Soviet Union out of the Middle East. Many young men were encouraged by the success of the Afghani fighters. They were sick of Western influences in the region and found truth and meaning in Bin Laden's organization.³⁵

Responding to local context, the Soviet occupation of Afghanistan, the Gulf War in Kuwait and the growing strength of the Muslim Brotherhood in Egypt³⁶, the late 1980s and 1990s reflect a shift toward the radicalization of Islamic ideology. Al-Qaeda sought to return the Muslim society to a society like the first generations. The organization believed that this reversion to purer times would cleanse the corruption in the Islamic faith and also protect Islam from corrupt, immoral Western influences. Al-Qaeda wished to purify Islam by stressing strict interpretation of Islamic law and strongly emphasizing a Muslim's individual duty to fight Western aggression and perform jihad. From its formation, al-Qaeda began organizing many attacks against the West, starting with the 1998 bombings of the U.S. embassies of Kenya and Tanzania. Many of these attacks were orchestrated under the leadership of Bin Laden.³⁷

³⁵ Euben and Zaman, *Princeton Readings in Islamist Thought*, 426–39; Bonney *Jihad from Qur'an to bin Laden* 1-20.

³⁶ The Muslim Brotherhood was founded in 1928 by Hasan al-Banna. The groups promoted the role of Islamic Law in government and opposed to Great Britain in Egypt. Euben and Zaman, *Princeton Readings in Islamist Thought*, 129–135.

³⁷ Miller, *The Audacious Ascetic*, 370; Euben and Zaman, *Princeton Readings in Islamist Thought*, 426–39.

Al-Qaeda's ideology regarding what it means to be a Muslim reflects Bin Laden's early life experiences and scholarly influences. Born in 1957, Bin Laden's family was close to the Saudi monarchy. Deemed a "double outsider" by *Princeton Readings in Islamic Thought* authors Roxanne Euben and Muhammad Zaman, Bin Laden's parents were from Syria and Yemen. In 1984 Bin Laden joined the "Afghani army of Jihad against the Soviet occupation in Afghanistan." The group formed in response to the Soviet occupation in Afghanistan and was funded by Western interests, namely the United States. Due to Bin Laden's radical activities and his associations with the Afghani activity of jihad in Afghanistan he was eventually expelled from Saudi Arabia and forced to flee to the Sudan in 1992, where he was able to hide his preliminary al-Qaeda operations. In Sudan, al-Qaeda gained traction as Bin Laden used companies to smuggle money and raise funds for the organization. Leaving Sudan in 1996 Bin Laden, returned to Afghanistan, where, under the protection of the Taliban government, Bin Laden found true refuge and would formulate an organization of immense influence. Shortly after returning to Afghanistan, Bin Laden began issuing fatwas, and he published the "Declaration of Jihad."³⁸ Indeed, Bin Laden's early ideology is in part a response to his local context, that of Western occupation in Afghanistan and his identity in Saudi Arabia. But, he was also greatly influenced by historical and religious figures too.³⁹

Bin Laden was heavily influenced by many radical Islamic scholars, like Ibn Taymiyyah, Muhammad Ibn 'Abd al-Wahhab and Sayyid Qutb. Firstly, Bin Laden sought legitimacy in Ibn Taymiyyah's doctrine on defensive jihad against the unbelievers who were threatening the faith. As previously mentioned, Ibn Taymiyyah is often

³⁸ Miller, *The Audacious Ascetic*, 1–20. Euben and Zaman, *Princeton Readings in Islamist Thought*, 426–39.

³⁹ *Ibid.*, 426–39.

credited for reinventing the concept of jihad and bringing the concept of the individual to the forefront. While Taymiyyah's ideologies of the obligation of jihad reflect his local context in which Islam was threatened by the Mongols, Bin Laden's ideals also reflect a similar response to a specific threat, in which Western influences occupy "The Two Holy Places" and threaten Islam.⁴⁰

Secondly Bin Laden was greatly influenced by Muhammad Ibn 'Abd al-Wahhab (d. 1792), an eighteenth century Islamic scholar who stressed the need for a reversion to the values of the first Muslim community. Muhammad Ibn 'Abd al-Wahhab preached the necessity to return Islam to its founding principles. He stressed that the corruption of the Muslim community had brought Muslims further from God, to a point at which they could no longer achieve oneness.⁴¹

Thirdly, Bin Laden was heavily influenced by the prolific author and Egyptian scholar Sayyid Qutb. Qutb's works, especially his narrative *Milestones*, in which he highlights the moral corruption of American society, remained a guiding principle for al-Qaeda. Qutb was an Egyptian who sought to remake the foundations of the Egyptian state. He provided an ideology for the Muslim Brotherhood in Egypt in the 1950s. After spending time at school in the United States in Greeley Colorado, Qutb returned to Egypt with a horrific picture of American society as morally and religiously corrupt. His perception of American society as arrogant and superficial would be adopted by al-Qaeda. After the publication of his book *Milestones* Qutb was arrested in 1955. He would later be released, then re-imprisoned under Egyptian President Nasser for conspiring against the government. Found guilty, Qutb was executed in 1966. Qutb provided a

⁴⁰ Ibrahim, Zawāhirī, and Bin Laden, *The Al Qaeda Reader*, xxv; Euben and Zaman, *Princeton Readings in Islamist Thought*, 129–135.

⁴¹ Euben and Zaman, *Princeton Readings in Islamist Thought*, 426.

significant source of religious and political influence for Bin Laden. Qutb stressed the need for a unified Islam to respond to the corrupt West. Zawahiri, Bin Laden's right hand man and the theologian behind the al-Qaeda operations, acknowledges that it was Sayyid Qutb who sparked the Muslims to rise up and strive to purify Islam. Zawahiri says of Qutb,⁴² "Sayyid Qutb's call for loyalty to God's oneness and to acknowledge God's sole authority and sovereignty was the spark that ignited the Islamic revolution against the enemies of Islam at home and abroad."⁴³ Lastly, Abdu Allah Yusuf Mustafa Azzam (1941-89) a Palestinian who took part in the Palestinian Jihad against Israel was another highly influential figure for Bin Laden. Azzam and Bin Laden came into contact fighting in Afghanistan against the Soviet Union in the 1980s. Azzam strove to make jihad a global cause, and his notion for global jihad and bringing the fight to the world stage would be highly influential for Bin Laden. He was assassinated in 1989.

Although Bin Laden is often deemed the mastermind behind the al-Qaeda operations, Dr. Ayman al-Zawahiri, born in 1951 in Cairo, provided the true theological and ideological foundation for the al-Qaeda operation. Zawahiri lived during the rise of the Muslim Brotherhood in Egypt under President Nasser and later President Sadat. He joined the Muslim Brotherhood at the age of fourteen and would later participate in the Islamic Egyptian jihad. His wealthy parents sent him to the University of Cairo where he studied medicine. After graduating in 1974, Zawahiri had a full fledged career in medical surgery. He first came into contact with the Islamist movement in Afghanistan in the summer of 1980 when he traveled to Pakistan to aid in the relief effort for Afghani

⁴² Ibid., 129–35.

⁴³ Mansfield, Laura. *His Own Words: Translation and Analysis of the Writings of Dr. Ayman Al Zawahiri*. [Old Tappan, NJ]: TLG Publications, 2006, 48.

refuges that had fled Afghanistan during the Soviet Occupation. Already a proponent of the jihadist movement in Egypt, Zawahiri saw his trip to Pakistan as an opportunity to learn more about the movement. Indeed, he says about his preliminary years in Pakistan, “I was always searching for a secure base for jihadist activity in Egypt because the members of the fundamentalist movement were the target of repeated security crackdowns.”⁴⁴ After returning to Egypt in 1981 Zawahiri was imprisoned. Following his release, he returned to the Afghani Jihad arena organization in the middle of 1986.⁴⁵

Bin Laden and al-Qaeda have relied heavily on the writings of al-Zawahiri, especially his famous treatises *Jihad, Martyrdom, and the Killing of Innocents* to justify their positions on the individual duty of every Muslim to practice jihad. There are two reasons for Bin Laden’s heavy reliance on Zawahiri’s work. Firstly, though a powerful orator by nature, many scholars view Bin Laden’s ideology as lacking in authenticity. Indeed, he takes much of his ideology from previous Islamic scholars.⁴⁶ Secondly, because Bin Laden did not have twelve years of formal training, he cannot legally issue legitimate *fatwas*. As such, Zawahiri’s knowledge and scholarship remains the backbone of the al-Qaeda organization.⁴⁷ Utilizing *hadith*, Zawahiri issued numerous *fatwas* to exhort the Muslim community to remember their duties. ⁴⁸ Indeed, while Bin Laden may have provided the figurehead of the organization, Zawahiri’s writings illuminate Bin Laden’s central emphasis on jihad and martyrdom.⁴⁹

⁴⁴ Ibid.,26.

⁴⁵ Ibid., 5–30.

⁴⁶ Euben and Zaman, *Princeton Readings in Islamist Thought*, 427.

⁴⁷ Ibrahim, *The Al Qaeda Reader*, 4.

⁴⁸ Ibid., 3.

⁴⁹ Ibid., 5–30.

Zawahiri and Bin Laden's Exemplification of the Islamic Duty

Al-Zawahiri's treatise *Jihad, Martyrdom, and the Killing of Innocents*, articulates how al-Qaeda identifies jihad as a defensive jihad, and a supreme Muslim obligation, in which martyrdom is both glorified and encouraged. In the treatise, Zawahiri argues that jihad is an obligation and a duty for all Muslims. He begins his treatise urging all Muslims to fight in the way of Jihad. He quotes the Qur'an to articulate Allah's power, saying,

“Allah, the Blessed and Most High, said: “Allah has purchased from the believers their lives and worldly goods, and in return has promised them Paradise: they shall fight in the way of Allah and shall slay and be slain. Such is the true promise which He has made them in the Torah, the Gospel, and the Koran. And who is more true to his pledge than Allah? Rejoice then in the bargain you have made. That is the supreme triumph.”⁵⁰

Zawahiri further reinforces the obligation of all Muslims to undertake jihad against the unbelievers, saying, “moreover Allah Most High has obligated believers to battle all those who reject Him, the exhalted, until all chaos ceases and all religions belong to Allah. The Most High said: Fight them until there is no more chaos and (all) religion belongs to Allah.”⁵¹ Accordingly, not only are all Muslims required to participate in the jihad, but those that do not should be humiliated and treated as not true Muslims.

According to Zawahiri, if one does not obey the individual obligation to perform jihad, they should be humiliated and treated as unbelievers. Zawahiri provocatively tells of the humiliation of Muslims that abandon the call to jihad, saying, “if you take up a domestic life, hold on to the tails of cattle, are content with farming, and thus abandon jihad, Allah will let humiliation lord over you until you return to your religion.”⁵²

⁵⁰ Ibid., 143.

⁵¹ Ibid., 144.

⁵² Ibid., 137.

Additionally, Zawahiri states that, “thus the Prophet made abandonment of jihad in the way of Allah as the cause for humiliation and disgrace, while making glory-all glory! Incumbent upon a return to jihad in the way of Allah most High, which he regarded as a return to religion.”⁵³ Zawahiri places specific emphasis on the Muslim’s utmost individual duty to perform jihad. He then defines the nature of his concept of jihad.⁵⁴

Zawahiri demonstrates that jihad is a defensive jihad, performed in response to a threat to Islam. While the first generations practiced offensive jihad in which Muhammad fought to conquer territories and spread the faith, Zawahiri argues that modern, local contexts require that jihad be performed as a response to oppression and threats from the West. Because Zawahiri’s jihad is defensive, one must fight whole heartedly. No one is exempt from jihad, and no casualties are exempt from jihad. Because of the weakness he perceives in the Islamic world, defensive jihad is a response to a crisis. Zawahiri states of the fighting of the defensive jihad, “in a defensive jihad, which al-Qaeda time and time again claim to be wagging and where Islam itself is perceived to be under attack, all these stipulations fade away in the background of Muslims fighting any way they can for their very existence.”⁵⁵ Like Bin Laden, who perceives the Islamic world as being under attack, Zawahiri also views the obligation of all Muslims to perform jihad as a necessity.

Zawahiri’s treatise also highlights the role and special place of the martyr in jihad. According to Zawahiri, martyrdom should be praised. In fact, acts of martyrdom performed in the way of Allah and the Islamic religion are rewarded by God. According to Zawahiri, martyrdom must be performed for the good of God. As he states in his treatise, “therefore, this clearly demonstrates that there is no difference whatsoever

⁵³ Ibid., 145.

⁵⁴ Ibrahim, *The Al Qaeda Reader*, 130-50.

⁵⁵ Ibid., 135-45.

between the man who kills himself, or who plunges himself into the ranks of the enemy and they kill him, or who command another to kill him – provided that this is all done for the good and glory of Islam.”⁵⁶ Accordingly, as cited in Zawahiri’s treatise, a specific *hadith* declares that: “Al Muqadem bin Ma’ad Yakrub said Muhammad said” The martyr is special to Allah. He is forgiven from the first drop of blood (that he sheds). He sees his throne in Paradise, where he will be adorned in ornaments of faith.”⁵⁷

Interestingly, Zawahiri models his concept of martyrdom on the early Islamic martyr. During the first generations when Islam evolved into a conquest society, the martyr was highly glorified and essential to the cause in warfare. Not only was the fighter who sacrificed himself rewarded in heaven. In addition, the martyr was seen as the very best Muslim. As Zawahiri states of their greatness: “Whoever sacrifices himself on behalf of Allah Most High submitting himself to the path of Allah, is the best of persons, by witness of the truest of all creation (Muhammad).”⁵⁸ In this statement, Zawahiri particularly stressed the motivations of the war hero.⁵⁹

Lastly, when it comes to the subject of martyrdom, Zawahiri stresses that the intention of the martyr is crucial. According to Zawahiri it is the intent of the martyr that matters and not how he dies, whether through suicide or by being killed by another.⁶⁰ Therefore, if the death is for Islam, and the intent is pure, then the action is holy. Indeed, as Zawahiri states of the martyr’s esteemed position, “this death came by way of

⁵⁶ Ibid.,156.

⁵⁷ Ibid., 144.

⁵⁸ Ibid., 146.

⁵⁹ Ibid., 140-150.

⁶⁰ Ibid., 138.

empowering the call (to Islam) and placing people in the religion of Allah Supreme. Thus this death was a victory for the call.”⁶¹ Such a death then is deemed legitimate.

One important observation to note is the fact that Zawahiri’s treatise relied heavily on *hadith* sources. The validity of *hadith* is still a constant source of scholarly discourse. It is therefore, interesting that Zawahiri bases many of his arguments on sources that are often questioned. As *al-Qaeda Reader* author Ibrahim notes, “Zawahiri’s choices of Qur’anic literature emphasize striking stories with vivid imagery and that target a broad range of Muslims.”⁶² For example, one story that Zawahiri highlights, describes a beggared, poor man and a youth who has lost his spiritual path. Zawahiri uses these passages to target a vast array of young lost Muslims. Zawahiri’s choices of hadith reflect a desire to target the largest Muslim community possible.⁶³

Further reinforcing al-Qaeda’s guiding principles and Zawahiri’s treatises, Bin Laden’s own literature, specifically, “Declaration of War Against the Americans,” which was written in 1996 in response to what he saw as the Western aggression in the Middle East, and specifically the United States occupation in Saudi Arabia during the Gulf War, provides further arguments for the individual obligation of the Muslim to participate in defensive jihad. According to Bin Laden, jihad, against the state and the unbelievers is the most important obligation of a Muslim after faith itself.⁶⁴ He states in his declaration regarding the individual Muslim obligation of jihad, “jihad against an unbeliever is an individual obligation second in importance only to faith.”⁶⁵ Additionally, jihad is as much an individual obligation as it is a collective obligation. For Bin Laden, jihad is no longer a

⁶¹ Ibid., 149.

⁶² Ibid.

⁶³ Ibid., 147-153.

⁶⁴ Bonner, *Jihad in Islamic History*, 12.

⁶⁵ Euben and Zaman, *Princeton Readings in Islamist Thought*, 427.

collective obligation for the able-bodied men and fighters to wage to protect the faith, but a burden that is placed on every Muslim. While in Muhammad's time Muslims' faced an external jihad, an outward struggle, as well as an inward struggle, a struggle with one's soul to resist all worldly temptations in the way of Allah. Bin Laden diverges from the concept of external and internal jihad. He develops a new type of jihad and he calls on all ably bodied Muslims to adhere to their duty, to participate in jihad against all the unbelievers and threats to Islam.⁶⁶

Bin Laden's, "Declaration of War Against the Americans," notes that jihad is a defensive jihad because the Muslim community is under attack; the jihad is a response to the Christians and Jews that have occupied the Middle East. While in the first generation, the Prophet engaged in offensive jihad, a warlike violence to spread the Islamic faith, now, according to Bin Laden, because the Islamic world is threatened, jihad must be responsive and defensive. Commenting on the nature of modern culture, Bin Laden states that the world is "an anti-Islamic minefield in which Muslims are under constant attack." He continues: "nothing is more sacred than belief except repulsing an enemy who is attacking religion and life."⁶⁷ Because of the political and military actions of the United States, the defensive jihad is, according to Bin Laden, "in response to Western Imperialism and those that perhaps threaten the pure Islamic faith."⁶⁸ Bin Laden further stresses the threat of Western aggression, saying, "the latest and the greatest aggressions inflicted on Muslims since the death of the prophet (peace be upon him) is the occupation of the Land of the Two Holy Places."⁶⁹ Bin Laden notes the Western threat of the United

⁶⁶ Ibid, 436-59.

⁶⁷ Ibid., 432.

⁶⁸ Ibid., 436-59.

⁶⁹ Ibid., 437.

States, occupying Saudi Arabia during the Gulf War. He further says that the American alliance with Israel is a threat to the Islamic faith. Thus, Bin Laden believes that the primary target of a defensive jihad should be the “Zionist-Crusader” alliance, the West and Israel. Using the historical sources and literature as a crux and source of legitimacy, Bin Laden responds to his local context with violence. Bin Laden harnesses the language and concept of the individual duties of a Muslim, expanding what it means to be a Muslim to fit into his own context. Because Bin Laden believes the West threatens the Islamic world, he suggests that it is necessary for all Muslims to perform jihad.⁷⁰

Bin Laden explains that the notion of defensive jihad is a global issue that is not introducing new violence, but responding to existing threats and pre-existing violence. As Bin Laden notes of the pre-existing violence introduced by Western influences in the Middle East, he states, “the breadth and nature of this multilevel attack on Islam means that Muslims who fight it are not introducing violence into a heretofore peaceful world but rather engaging in a necessary and legitimate retaliation for a series of already existing provocations.”⁷¹ Also, the global jihad can no longer be contained between civilizations, religions, and political borders. In his “Declaration against America,” he states of the globalization of jihad, “global jihad essentially collapses distinctions between national and international, offensive and defensive fighting, enemies at home and those from afar.”⁷² Under these conditions, the individual duty for every Muslim to wage jihad against the West is necessary and in response to the local Western threat in the region, the presence of U.S. military forces.⁷³

⁷⁰ Ibid., 436–455.

⁷¹ Ibid., 433.

⁷² Ibid., 423.

⁷³ Ibid., 430–55.

Conclusion

The al-Qaeda funded and supported jihadist terrorist attack on the World Trade Center and Pentagon on September 11, 2001 marked a pivotal manifestation of Bin Laden and Zawahiri's ideology displayed in an act of aggression against the West. For Bin Laden and Zawahiri the West was best categorized by its political and economic institutions. According to Bin Laden and Zawahiri it was every Muslims duty to perform jihad against the West.

As demonstrated from the earliest sources to the more modern interpretations, the concept of the individual Muslim's duty to perform both jihad and acts of martyrdom has evolved and developed over time in response to localized politics and the presence of Western influences in the region. While Muhammad's time was marked by stark violence and oppression in the Arabian Peninsula, Islamic scholar Ibn Taymiyyah's fourteenth century writings on the individual duty of a Muslim to perform jihad reflect a shift in ideology toward a defensive jihad in response to Mongol invasions. More recently, al-Qaeda's ideology of jihad, which drives from Ibn Taymiyyah's concept of defensive jihad has been appropriated by the organization's leaders, Bin Laden and Zawahiri, and exemplifies a reactionary jihadi ideology, a response to Western imperialism, culture and military power in the world.

While there is a tendency to focus on an organizations leadership and how historical figures have interpreted the need for jihad over time, the shifting ideology of the individual Muslim's duty to perform jihad against the West is much more a response to local context and the presence of Western influence in the region than any one leader's

agenda or beliefs. As I have used the writings of al-Qaeda's primary leaders Bin Laden, and Zawahiri because those were the sources available. Most notably, both Zawahiri and Bin Laden have responded to their local context calling for jihad and practices of violence.

CHAPTER 2

The Evolution of al-Qaeda's Interpretation of the Muslim Duties after September 11, 2001 and the U.S. Invasion of Iraq in 2003

Introduction

In a well-orchestrated terrorist attack organized and financed by Bin Laden, nineteen al-Qaeda fighters from Saudi Arabia took part in a large-scale terrorist operation on September 11, 2001 against the United States that would have lasting implications for the United States and the al-Qaeda organization. The group of nineteen men, who were actually trained to fly in Texas, hijacked four United Airlines aircrafts and flew two of the planes into the World Trade Center in New York City. The third plane hit the Pentagon in Washington D.C. and the final plane was grounded in Pennsylvania, twenty miles from the White House. The fourth plane, flight United 93, crashed in Pittsburg, PA when people on board the flight stormed the cockpit and fought the hijackers. One member on board, Todd Beamer, reportedly called an operator, and in a recorded conversation said to another passenger, “Are you ready? Let’s roll!”⁷⁴ Todd Beamer’s actions marked the beginning of what would be years of American responses to al-Qaeda’s actions. Indeed, in a horrific and monumental spectacle, Bin Laden symbolically and physically attacked symbols of America’s supreme institutions of economic productivity and political power. Bin Laden wrote a letter right before the attacks to the nineteen hijackers entitled, “The Last Night.” In his letter, Bin Laden praised the terrorist men for their actions and offered instructions on the operation. He also maintains his fundamental ideology of the individual Muslim’s duty and obligation to wage global

⁷⁴ “The Todd Beamer Story.” *HISTORY.com*. Accessed March 29, 2016.
<http://www.history.com/topics/9-11-attacks/videos/the-todd-beamer-story-lets-roll>.

jihad against the West. He shares praise for martyrdom, saying, “embrace the will to die and renew allegiance...and be cheerful for you have only moments between you and your eternity, after which a happy and satisfying life begins, the eternal pleasures with the prophets, the righteous, the good and the martyrs, the best company you can have, whom God can provide you through His favor.”⁷⁵ The event of September 11, 2001 had two lasting effects; the first was the Western response to the attacks in which the United States invaded Afghanistan in 2001 and Iraq in 2003. The second effect was a shift within the al-Qaeda organization physically and ideologically.⁷⁶ Interestingly, in the coming years while al-Qaeda experienced extreme pressure and decentralization in Afghanistan and Iraq, the organization responded to their local context by expanding their ideology of the duties of every Muslim and their perception of the West.

Under President G.W. Bush, the United States responded to the events of September 11, 2001, by declaring a “War on Terror” and invading Afghanistan. The invasion would mark the beginning of a thirteen-year battle and the longest war ever fought by the United States.⁷⁷ On October 7, 2001, “Operation Enduring Freedom in Afghanistan” began. In the operation, the U.S. invaded Afghanistan, attacking the Taliban government that had provided Bin Laden and the al-Qaeda organization sanctuary for many years. While removing Taliban leader Mullah Muhammad Omar, the operations also worked to establish a new Afghani government. Additionally, the operation sought to destroy al-Qaeda networks in the country and track down leaders that

⁷⁵ Washington and Lee University, Professor Cantey’s Class, December 2015; News, “Handwritten Letter Instructed Hijackers.” <http://abcnews.go.com/US/story?id=92398&page=1>. April 6, 2016.

⁷⁶ “9/11 Attacks - Facts & Summary.” *HISTORY.com*. Accessed March 29, 2016. <http://www.history.com/topics/9-11-attacks>.

⁷⁷ “President Bush Announces Military Action in Afghanistan - Oct 07, 2001.” *HISTORY.com*. Accessed March 29, 2016. <http://www.history.com/this-day-in-history/president-bush-announces-military-action-in-afghanistan>.

had fled to the mountains. President G. W. Bush “warned that Afghanistan would likely be only the first front in a long struggle against terrorism.”⁷⁸ And, indeed, just two years later, Pentagon interests shifted to Iraq. On March 19th 2003, the U.S. invaded Iraq. The operation named “Operation Iraqi Freedom” had several objectives; to overthrow dictator Saddam Hussein, drive out terrorists from the region, liberate the Iraqi people by setting up a new government and eliminate Iraq’s weapons of mass destruction. While none were found, the operation culminated in the execution of Saddam Hussein. U.S. troops withdrew from Iraq in 2011, leaving in place a new Shi’a government headed by Shi’a leader Nouri al-Maliki. The U.S. presence in Afghanistan and U.S. forces in Iraq required al-Qaeda to expand their interpretations of the individual duty of all Muslims. Responding to local circumstances, the presence of American forces in Afghanistan and Iraq, al-Qaeda leaders redefined what it meant to be a Muslim, expanding the obligations of the individual Muslim in order to meet the needs of the organization.⁷⁹

Geographically, the al-Qaeda organization became decentralized in response to the U.S invasion in Afghanistan. A once strong network, with a top down leadership structure, al-Qaeda diffused as much of its core leadership went into hiding in the Afghani and Pakistani mountains. With physical dispersion, internal disputes within, in

⁷⁸ “U.S. War in Afghanistan.” *Council on Foreign Relations*, 2014. <http://www.cfr.org/afghanistan/us-war-afghanistan/p20018>.

⁷⁹ Sanger, Elisabeth Bumiller With David E. “A Somber Bush Says Terrorism Cannot Prevail.” *The New York Times*, September 12, 2001, sec. National. <http://www.nytimes.com/2001/09/12/national/12BUSH.html>; Apple, R.W. Jr. “Nation Plunges Into Fight With Enemy Hard to Identify.” *The New York Times*, September 12, 2001, sec. National. <http://www.nytimes.com/2001/09/12/national/12ASSE.html>; Schmemmann, Serge. “Hijacked Jets Destroy Twin Towers and Hit Pentagon.” *The New York Times*, September 12, 2001, sec. National. <http://www.nytimes.com/2001/09/12/national/12PLAN.html>.

particular, in response to the U.S. troops in Afghanistan in 2001, Bin Laden went into hiding in a Tora Bora cave, southeast of Kabul Afghanistan, before eventually fleeing to Pakistan. Like Bin Laden, many al-Qaeda members sought refuge in neighboring regions like Pakistan. Flagg Miller, author of *The Audacious Ascetic*, notes of the organizational fracturing, “the base proved too diffuse to respond as predicted to the kinds of militarized intervention marshaled by the United States after 11 September.”⁸⁰ While core al-Qaeda leaders went into hiding, many affiliate al-Qaeda groups or other militant groups dispersed around the Middle East. Al-Qaeda groups like al-Qaeda in Iraq sprung up in Iraq, al-Qaeda sprung up in the Indian Sub Continent and al-Qaeda in the Arabian Peninsula emerged too. ⁸¹ Interestingly, these affiliate groups were more interested in their own local issues than in Bin Laden’s core al-Qaeda call for every individual Muslim to participate in the global jihad against the West. As reported by the Congressional Research Service’s report entitled “Al-Qaeda Affiliated Groups: Middle East and Africa,” “al-Qaeda began as a hierarchical movement but began to decentralize after the American-led invasion of Afghanistan overthrew the Taliban, eliminating al-Qaeda’s sanctuary in that country. Affiliate groups, many of which had existed in some form prior to 9/11 but without formal ties to other groups, gradually began to formally align with al-Qaeda”⁸² Although many local groups began to align formally with al-Qaeda the extent to which al-Qaeda was able to exercise control over these groups is still not known. Remaining an active leader within the al-Qaeda organization, Bin Laden was finally

⁸⁰ Miller, *The Audacious Ascetic*, 370. “Timeline: U.S. War in Afghanistan.” Accessed March 29, 2016. <http://www.cfr.org/afghanistan/us-war-afghanistan/p20018>.

⁸¹ “Al Qaeda-Affiliated Groups: Middle East and Africa.” Accessed March 29, 2016. <http://fas.org/sgp/crs/mideast/R43756.pdf>.

⁸² Schmemmann, “Hijacked Jets Destroy Twin Towers and Hit Pentagon.”

killed in a military operation conducted by United States Navy SEALs on May 2, 2011. He had been hiding in a compound in Abbottabad, Pakistan.

Physical dispersion and the rise of affiliate groups only further reinforced ideological divergences and disputes within the al-Qaeda organization. Recovered in Bin Laden's hideout were numerous documents that further suggested internal divisions within the organization. Indeed, al-Qaeda documents released after the raid "assert that the organization's leadership was internally divided over how to deal with its affiliate groups and frustrated at its inability to control some local fighters."⁸³ Following Bin Laden's death, Zawahiri would assume leadership of Bin Laden's al-Qaeda and, he too, would try to expand his authority over offshoot al-Qaeda groups. In fact, Zawahiri publically acknowledged his struggle to maintain control of offshoot al-Qaeda groups in a broadcast made in 2014 in which he said of the decentralized al-Qaeda organization, "al-Qaeda is a message before it is an organization."⁸⁴ Indeed, September 11, 2001 resulted in a Western response, and an Islamic response. The U.S. invaded Afghanistan and then Iraq, and, responding to their local context, the presence of U.S. forces and pressures on the al-Qaeda hierarchical structure, al-Qaeda expanded and altered their perception of the duties of every Muslim.⁸⁵

In response to September 11, 2001, al-Qaeda's ideology of the Muslim's individual duty changed, moving away from the notion that it was every Muslim's duty to wage global jihad against the West, to a more localized duty, the duty to establish a caliphate in the Middle East. Before September 11, 2001, Bin Laden stressed that it was

⁸³ "Al Qaeda-Affiliated Groups: Middle East and Africa," 8.

⁸⁴ Anonymous. "The Mystery of ISIS." *The New York Review of Books*. Accessed March 29, 2016. <http://www.nybooks.com/articles/2015/08/13/mystery-isis/>.

⁸⁵ "Al Qaeda-Affiliated Groups: Middle East and Africa," 1–10.

every Muslim's duty, young or old, to participate in the global defensive jihad against the West. And, those that participated in waging this jihad and performing acts of martyrdom for the cause were glorified on earth and rewarded in heaven too. These al-Qaeda ideals of the individual Muslim's duty changed twice in response to local context, first after September 11, 2001, and then again in response to the U.S. invasion of Iraq in 2003.⁸⁶

Zawahiri's book *Knights under the Prophets Banner*, published in late 2001, represents the first turning point in al-Qaeda literature with regard to the individual Muslim's duties. Zawahiri's book began to introduce, broadly, a new duty, the duty to establish an Islamic State in the Middle East. In 2001, Zawahiri regarded the establishment of an Islamic State in the Middle East as a long-term goal. However, when the U.S. invaded Iraq in 2003, a manifested response to the terrorism of September 11, al-Qaeda in Iraq (AQI), an offshoot of Bin Laden's al-Qaeda in Afghanistan, responded to the Western occupation by calling for all Muslims to lend immediate help in establishing an Islamic State. With the U.S. invasion of Iraq in 2003, al-Qaeda's ideology regarding the concepts of jihad as an individual Muslim duty, would again shift, or rather harden, moving more definitively from a call to global jihad in response to the West, to the promotion of eliminating American troops in Iraq, fighting the local Shi'a community and the establishment of an Islamic State in Iraq.⁸⁷ Out of necessity, AQI responded to their local context, the presences of American troops in Iraq and the conflicts between

⁸⁶ Mansfield, *His Own Words*, 207–225. For more information about Zawahiri's focus on the establishment of the Islamic State in the homeland, please refer to Zawahiri's book "Knights Under the Prophets Banner," translated in Mansfield's *His Own Words*, 207–225.

⁸⁷ *Ibid.*, 250–271; Department Of State. The Office of Electronic Information, Bureau of Public Affairs. "Zarqawi Letter," February 12, 2004. <http://2001-2009.state.gov/p/nea/rls/31694.htm>.

Iraqi Sunni and Iraqi Shi'a communities, by expanding their perception of the individual duties of a Muslim to include establishing a caliphate in Iraq.

The second shift in the notion of the Islamic duty, which occurred in response to the U.S. invasion of Iraq in 2003, is documented in a letter that was sent in 2004 by the al-Qaeda leader in Iraq Abu Masab al- Zarqawi, to Bin Laden's core al-Qaeda operations. In his letter, the AQI, leader and Jordanian born militant Zarqawi pledged his loyalty to al-Qaeda. Additionally, Zarqawi explained his plans for Iraq and articulated his ideology of the individual Muslim's duties in Iraq, duties that no longer emphasized global jihad, but instead, focused on a localized fight against the occupying Americans, the Iraqi Shi'a community and the establishment of an Islamic State in Iraq and eventually a caliphate. Zarqawi's ideology about the duties of every Muslim reflects his context, that of an Iraq torn by Shi'a and Sunni factions, political unrest and the presence of American forces.

Zawahiri responded to Zarqawi's letter in 2005. Zawahiri's letter would only further exemplify the organizations shifting ideology of the individual Muslim's duties away from global jihad to a localized fight, a jihad waged for the eventual establishment of the caliphate. Interestingly, Zawahiri's letter would also demonstrate the importance of context. Zawahiri was operating from Pakistan and as a result his ideologies of the individual duties of every Muslim to wage global jihad reflect his local context. As such, Zarqawi's opposing perspective on the individual obligations of a Muslim would differ from Zawahiri and highlight his environment in Iraq. Indeed, Zawahiri's 2005 letter to Zarqawi serves to illuminate the growing factions of the organization, specifically

between Bin Laden's al-Qaeda in Afghanistan and offshoot al-Qaeda groups like Zarqawi's (AQI).⁸⁸

Core Al-Qaeda's Interpretation of the Individual Muslim's Duties after the September 11, 2001 Attacks

Al-Zawahiri's book *Knights under the Banner of the Prophet*, which was written after September, at the end of 2001, while introducing the need for a caliphate, still articulates al-Qaeda's core ideology before September 11, 2001, that of the primary duty of every Muslim to respond in an urgent, global jihad, to Western threats to Islam. The martyr as such is still both glorified and encouraged. According to Zawahiri, he wrote his *Knights under the Banner of the Prophet* to exemplify the urgency of the need for global jihad and to promote awareness of this urgency within the Muslim community. He says his hope for the book was that it would be one of revival, "this book was written in an attempt to revive the Muslim nation's awareness of its role and duty, its importance, and the duties that it needs to perform."⁸⁹ Furthermore, Zawahiri says of the global necessity and urgency to wage war on the West, "the battle today cannot be fought on a regional level without taking into account the global hostility toward us."⁹⁰ While highlighting the urgency of the jihad, Zawahiri also notes the responsive nature of the jihad.

Zawahiri frames the responsive nature of jihad, as a reaction to a previous threat, the Western occupation. Zawahiri notes the Americans' direct involvement during the

⁸⁸ Ibid., 270–275. Department Of State. The Office of Electronic Information, Bureau of Public Affairs. "Zarqawi Letter," February 12, 2004. <http://20012009.state.gov/p/nea/rls/31694.htm>.

⁸⁹ Mansfield, *His Own Words*, 20.

⁹⁰ Ibid., 21.

First Gulf War in 1990 as the turning point from an indirect involvement of Western influences, behind a veil, to a direct oppressive involvement. Zawahiri says of the Americans forces in the First Gulf War, “the fruit of the jihad resistance goes beyond inspiring hope in the hearts of the Muslim youths. Furthermore, stepping up the jihad action to harm the U.S. and Jewish interests creates a sense of resistance among the people, who consider the Jews and Americans a horrible symbol of arrogance and tyranny.”⁹¹ In response to the American occupation and the Jewish-U.S. alliance, it is the duty of every Muslim to wage war against such alliance. Indeed, Zawahiri continues to articulate the individual Muslim’s duty to perform jihad, saying, “the fundamentalist movement realizes that a clash between it and the Jewish-U.S. alliance is inevitable and understand that this is its destiny and study, that this is its battle that it has been waging and will wage further still.”⁹² Because of the U.S. presence in the Middle East, Zawahiri responds to his local context by demonstrating the urgency of the individual duty of the Muslim to perform jihad.

According to Zawahiri, the promotion of jihad is necessary to defend Islam. He says again, when speaking specifically about small groups targeting the Americans, that it is every Muslim’s duty to defend Islam. Zawahiri explains such duty, saying “that the jihad movement in particular must launch a battle for orienting the nation by holding every Muslim responsible for defending Islam, its sanctities, nation, and homeland.”⁹³ Not only is jihad necessary for the mujahedeen, but for the whole nation. Zawahiri hints at this jihad, saying, “an important point that must be underlined is that this battle, which

⁹¹ Ibid., 110. For more information about the role of America and the Jews during the first Gulf War and Zawahiri’s grievances about the U.S. forces in Saudi Arabia please refer to Zawahiri’s book *Knights under the Prophets Banner* found in Mansfield’s *His Own Words*, pages 110-112, 119-127.

⁹² Ibid., 136.

⁹³ Ibid., 213.

we must wage to defend our creed, Muslim nation, sanctities, honor, values, wealth and power, is a battle facing every Muslim, young or old.”⁹⁴ While identifying the type of jihad necessary, Zawahiri also promotes the martyr.⁹⁵



Fig 1. Al-Zawahiri’s book *Knights Under the Prophet’s Banner* exemplifies his shifting ideology regarding the duties of every Muslim. He highlights the significance of establishing the Caliphate and also promoting Bin Laden’s call for global jihad.⁹⁶

Not only promoting the cause of global jihad in response to Western threats, Zawahiri’s *Knights under the Prophet’s Banner* also further exemplifies the role of the martyr. He says of the glory of the martyr, “if I fall as a martyr in the defense of Islam, my son Muhammad will avenge me, but if I am finished politically and I spend my time

⁹⁴ Ibid., 233.

⁹⁵ Ibid., 20–30, 200–30.

⁹⁶ http://1.bp.blogspot.com/_OTIxY_mbmGA/TNK2ZxYcKEI/AAAAAAAAAJI/Ph_jKMmYFL8/s320/1.jpg, April 7, 2016

arguing with governments about some partial solutions, what will motivate my son to take up weapons after I have sold these weapons up the bargains market?”⁹⁷ He further says that the success of the jihad movement lies in the hand of the martyr as the most effective method of fighting the enemy. Zawahiri states of the martyr’s effectiveness: “the need to concentrate on the method of martyrdom operations as the most successful way of inflicting damage against the opponent.”⁹⁸ Indeed, Zawahiri’s ideology regarding the role of the martyr and the call for global jihad remains fluid consistent with his earlier works, written before September 11, 2001. Like Bin Laden, perhaps Zawahiri’s particular emphasis on the martyr is a tactic used to harness the internal frustrations among the Islamist community. Perhaps while Zawahiri was responding to his context he was also hoping to inspire those who were discontented with the failures among the Islamist community to take action.⁹⁹

While reinforcing the necessity to wage jihad and every Muslim’s duty to perform jihad, Zawahiri’s *Knights under the Banner of the Prophet*, also alludes to an even greater Muslim calling and duty, the establishment of an Islamic state. Zawahiri calls on Muslims to establish an Islamic state: “the jihad movement must adopt its plan on the basis of controlling a piece of land in the heart of the Islamic world on which it could establish and protect the state of Islam and launch its battle to restore the national caliphate based on the traditions of the prophet.”¹⁰⁰ Acknowledging the establishment of an Islamic state, Zawahiri argues that this goal will only be achieved through struggle, through jihad. Zawahiri says of this jihad, “the struggle for the establishment of the

⁹⁷ Mansfield, *His Own Words*, 213.

⁹⁸ *Ibid.*, 223.

⁹⁹ *Ibid.*, 220–23.

¹⁰⁰ *Ibid.*, 214.

Muslim state cannot be considered a regional struggle, certainly not after it has been ascertained that the Crusader alliance led by the United States will not allow any Muslim force to reach power in the Arab countries.”¹⁰¹ Zawahiri connects the establishment of the Islamic state to violence.

While Zawahiri refers to an Islamic state and caliphate as the end goal, he also acknowledges that this ideal goal could take many generations to reach. He alludes to the British occupation of Egypt for 70 years and the French occupation of Algeria for 120 years as examples of Western oppression that took generations to alleviate. With regard to his own movement in Egypt, Zawahiri says the establishment of an Islamic government was an arduous process, “the fundamentalist movement’s goal of establishing an Islamic government in Egypt is yet to be achieved...More importantly, this is a goal that could take several generations to achieve.”¹⁰² Zawahiri’s concept of the eventual establishment of caliphate reflects the difficulties that Zawahiri had previously encountered in Egypt with the Muslim Brotherhood, which had failed to gain legitimacy and influence in Egypt. Indeed, he exhorts the Islamic community to form the caliphate through a series of steps, expanding the individual duties of a Muslim to include promoting the formation of the caliphate.¹⁰³

Interestingly, Zawahiri’s choice of words when discussing the formation of an Islamic state and caliphate in his *Knights under the Prophet of the Banner* suggests that he believes that the individual duty of all Muslims to form a caliphate is something foreseen, in the distant future, maybe even suggesting that there are more immediate, urgent duties for every Muslim to focus on first. He refers to the establishment of the

¹⁰¹ Ibid., 201.

¹⁰² Ibid., 117.

¹⁰³ Ibid., 214–17.

caliphate as “an aspired goal” saying, “the aspired goal, which is the restoration of the caliphate and the dismissal of the invaders from the land of Islam.”¹⁰⁴ Additionally, he articulates this goal as a “hope” for the Muslim community, saying, “the establishment of a Muslim state in the heart of the Islamic world is not an easy goal or an objective that is close at hand. But it constitutes the hope of the Muslim nation to reinstate its fallen caliphate and regain its lost glory.”¹⁰⁵ Not only does Zawahiri state such a goal as “a hope,” acknowledging that it may be far fetched and a lofty aspiration, but he orders the Muslim community first to establish a Muslim Islamic state before a full caliphate. He seems to articulate the establishment of the caliphate as the end goal that might require many lesser steps in the process, like the establishment of the Islamic state foremost. Interestingly, with the U.S. invasion of Iraq, Zawahiri’s ideology about the individual duties of every Muslim would change and become more focused on the establishment of an Islamic state. Offshoot al-Qaeda groups like AQI, lead by Zarqawi in Iraq, would further encourage every Muslim to participate in the establishment of the Islamic State.¹⁰⁶

The Emergence of a New Individual Muslim Duty in Iraq after the U.S. Invasion in 2003

In response to the U.S. invasion of Iraq in 2003, Abu Masab al- Zarqawi, the al-Qaeda leader in Iraq, suggested that all Muslims were obligated to participate in the

¹⁰⁴ Ibid., 225.

¹⁰⁵ Ibid., 215.

¹⁰⁶ Ibid., 114–225.

immediate establishment of an Islamic State in Iraq. Al-Zarqawi was born in Jordan into a Bedouin family in 1966. He spent his early life in the town of Zarqa, Jordan. He received no formal, religious or secular education. As an adolescent, he was known for drinking and being rebellious toward local police and eventually his mother sent him to religious, Islamic school.¹⁰⁷ Like Bin Laden and Zawahiri, Zarqawi was enthralled by the mujahidin¹⁰⁸ and the fight against the West. Zarqawi went to Afghanistan to participate in the anti Soviet jihad in Afghanistan at the end of 1989 just as Russia was withdrawing. It was in Afghanistan that Zarqawi had first come into contact with Bin Laden in 1999. The two men did not get along. Leaving Afghanistan shortly afterwards, Zarqawi spent the late 1990s founding his own local militant group in Jordan called Jund al-Sham. After a short stint in prison in Jordan, Zarqawi was released in 1999 by Jordan's King Abdullah. Returning to Afghanistan, Zarqawi set up a jihadi training camp in northern Afghanistan in the town of Herat. Although Bin Laden gave Zarqawi limited funds to set up the camp, Zarqawi remained distanced from Bin Laden, maintaining a stricter religious ideology. Specifically, unlike Bin Laden, Zarqawi was extremely anti Shi'a and believed that in addition to fighting the West, he had an obligation to fight the Shi'a community whom he thought were not true Muslims. ¹⁰⁹

In October of 2001, in response to the U.S. invasion of Afghanistan after September 11, 2001, Zarqawi fought alongside Taliban forces and al-Qaeda in Afghanistan. Leaving Afghanistan in 2002, Zarqawi went to Northern Iraq. There he was able to consolidate his

¹⁰⁷ Anonymous. "The Mystery of ISIS." *The New York Review of Books*. Accessed March 29, 2016. <http://www.nybooks.com/articles/2015/08/13/mystery-isis/>.

¹⁰⁸ The Mujahidin are Islamic fighters who fight in the way of the faith.

¹⁰⁹ Bunzel, Cole. "From Paper State to Caliphate: The Ideology of the Islamic State." *Center for Middle East Policy at Brookings Institution*, March 19, 2015, 47.

decentralized militant jihadi group Jund al-Sham under one name Jamm'at al-Tawhid wal- al-Jihad (The Group of God's Unity and Jihad). After 2004, when Zarqawi finally pledged his loyalty to Bin Laden, Jamm'at al-Tawhid wa-l-Jihad became al-Qaeda in Iraq (AQI).¹¹⁰ Although ideologically the groups bear some stark ideological differences, their shared ambition of establishing an Islamic State in Iraq would prove to have lasting consequences.¹¹¹ By the time he was killed in an air raid in 2006, Zarqawi's life of militancy had laid the foundations for the establishment of the Islamic State.¹¹²

Zarqawi's ideology regarding what it means to be a Muslim, and the individual duties of the Muslim, diverged from Bin Laden's ideology. Zarqawi's religious ideology is characterized by a strong anti- Shi'a sentiment and he believes in the fundamental duty of every Muslim to participate in the re-establishment of the caliphate. Interestingly, between 2002-2005 Zarqawi spent most of his time not in targeting the occupying American troops, but the Shi'a community. Like Bin Laden, his ideals draw heavily on Ibn Taymiyya's fourteenth century scholarship. Ibn Taymiyya also shared anti Shi'a sentiments and believed that the Shi'a practice went beyond the Islamic faith.¹¹³ For example, in a modern context, Zarqawi follows Ibn Taymiyya's ideology when he describes the overwhelming majority of Shi'a Muslims in Iran as a phenomenon whose existence is "a dagger that stabbed Islam and the Muslims in the back."¹¹⁴ While Bin Laden referred to the immediate threat in Iraq as the occupation of American soldiers on Islamic soil, Zarqawi believed the greater danger was the Shi'a population. He says of the

¹¹⁰ Ibid., 13–16.

¹¹¹ Ibid.

¹¹² Anonymous. "The Mystery of ISIS." *The New York Review of Books*. Accessed March 29, 2016. <http://www.nybooks.com/articles/2015/08/13/mystery-isis/>; Bunzel, "From Paper State to Caliphate," 13–47.

¹¹³ Ibid., 14.

¹¹⁴ Ibid.

Shi'a, "the danger from the Shi'a...is greater and their damage worse and more destructive to the [Islamic] nation than the Americans."¹¹⁵ Bin Laden did not agree with Zarqawi's treatment of the Shia. Although al-Qaeda only gave Zarqawi a small financial offering in 1999, many believe that "the fact that it didn't give him more reflected bin Laden's horror at Zarqawi's killing of Shi'a Muslims (Bin Laden's mother was Shi'a)."¹¹⁶ Bin Laden's ideology regarding what it means to be a Muslim and the obligations of every Muslim was actually more concerned with hearts and minds than Zarqawi's ideology that reflects a more crass and violent perspective. Zarqawi's targeting of the Shi'a Muslims in Iraq in particular would serve as a stark differentiator between Zarqawi's and Bin Laden's ideologies.

Additionally, Zarqawi's interpretation of *takfir*¹¹⁷ and his practice of accusing Muslims of heresy to justify killing Shi'a in Iraq promoted civil war in Iraq. Strategic in his actions, by 2003, Zarqawi had "set up an insurgency network in Iraq. By targeting Shi'a Muslims and their most holy sites, he was able to turn an insurgency against U.S. troops into a Shi'a-Sunni civil war."¹¹⁸ When he was killed in 2006 Muslims worldwide viewed his work in Iraq as an exemplification of brutality and cruelty. ¹¹⁹ Zarqawi wrote a letter to Bin Laden's al-Qaeda in 2004 in which he pledged his allegiance to the organization. The contents of Zarqawi's letter also reflected his place in Iraq and the

¹¹⁵ Ibid.

¹¹⁶ Anonymous. "The Mystery of ISIS." *The New York Review of Books*. Accessed March 29, 2016. <http://www.nybooks.com/articles/2015/08/13/mystery-isis/>

¹¹⁷ Bunzel, "From Paper State to Caliphate," 20. Bunzel describes takfir "as the excommunication of Sunni Muslims." See *ibid*, 30.

¹¹⁸ Anonymous. "The Mystery of ISIS." *The New York Review of Books*. Accessed March 29, 2016. <http://www.nybooks.com/articles/2015/08/13/mystery-isis/>

¹¹⁹ *Ibid*.

changing al-Qaeda ideology of the individual Muslim duties away from global jihad to establishing a caliphate.¹²⁰

In Zarqawi's letter, which was intercepted by the U.S. government, Zawahiri wrote to Zawahiri, pledging his allegiance to the organization, articulating his militant plans in Iraq and highlighting his perspective on what it means to be a Muslim. Publically announcing his alliance with al-Qaeda, Zarqawi wrote to Zawahiri, "we stand ready as an army for you, to work under your guidance and yield to your command. Indeed, we openly and publicly swear allegiance to you by using the media, in order to exasperate the infidels and confirm to the adherents of faith that one day, the believers will revel in God's victory."¹²¹ Additionally, in his note, Zarqawi states his plans for Iraq, responding to the American occupation. He wanted to target the Americans, Kurds, Iraqi police and the Shi'a community.¹²² While Zarqawi specifically targets portions of the Muslim community, and his hostility toward the Shi'a in Iraq has distinguished him from core al-Qaeda, he shares with Zawahiri and the core al-Qaeda leadership a desire to establish an Islamic caliphate in Iraq.¹²³

In 2004 Zarqawi believed targeting the Shi'a population in Iraq was the primary duty for all Sunni Muslims. Zarqawi's concept of the individual duties of a Muslim reflects his context in Iraq. The Shi'a Muslim population had cooperated with American forces, and, according to Zarqawi, such cooperation required all able Sunni Muslims to

¹²⁰ Ibid.

¹²¹ Mansfield, *His Own Words*, 250–271.

¹²² Department Of State. The Office of Electronic Information, Bureau of Public Affairs. "Zarqawi Letter," February 12, 2004. <http://2001-2009.state.gov/p/nea/rls/31694.htm>.

¹²³ Ibid; Bunzel, "From Paper State to Caliphate," 12-25; al-Zarqawi, Abu Masab. "Zarqawi's 'Total War' on Iraqi Shiites Exposes a Divide among Sunni Jihadists," 2004.

<http://www.washingtoninstitute.org/policy-analysis/view/zarqawis-total-war-on-iraqi-shiites-exposes-a-divide-among-sunni-jihadists>.

respond immediately by fighting the Iraqi Shi'a. According to Zarqawi the Shi'a had wrongly cooperated with the Americans. Zarqawi notes the Shia'-s' cooperation with the Americans, saying, "they had supported the Americans, helped them, and stand with them against the Mujahadeen. They work and continue to work towards the destruction of the Mujahadeen."¹²⁴ Zarqawi viewed the Shi'a cooperation as a greater threat than the presence of U.S. troops in Iraq. In his letter to Zawahiri he further says of the Shi'a threat, "the Shi'a have declared a subtle war against Islam. They are the close, dangerous enemy of the Sunni Muslims. Even if the Americans are also an archenemy, the Shi'a are a greater danger and their harm more destructive to the nation than that of the Americans who are anyway the original enemy by consensus."¹²⁵ Zarqawi's call for every Muslim to fight the Shi'a community represents a divergence from core al-Qaeda's call for global jihad. Zarqawi's shifting ideology regarding the individual duties of a Muslim reflects his local context, one in which the Shi'a community was aiding the distant enemy, the Americans.

Zarqawi also thought that in fighting the Shi'a community, he would gain more Sunni support and perhaps facilitate a civil war between the Iraqi Sunni and Iraqi Shi'a. Historian Cole Bunzel noted in his "From Paper State to Caliphate," that this shift towards, targeting the Shi'a, set a precedent and a fundamental belief for the emergence of ISIS. Bunzel states: "Zarqawi articulated a strategy of deliberately targeting the Iraqi Shi'a community with the intention of stoking civil war. In a February 2004 letter to the al-Qaeda leadership, later intercepted by U.S. forces, Zarqawi attacked the Shi'a in both

¹²⁴ Department Of State. The Office of Electronic Information, Bureau of Public Affairs. "Zarqawi Letter," February 12, 2004. <http://2001-2009.state.gov/p/nea/rls/31694.htm>.

¹²⁵ Ibid.

theological and political terms, and his arguments remain a staple of the Islamic State's ideology."¹²⁶

Zarqawi also says of his belief in stimulating civil war, "targeting and hitting [the Shi'a] in [their] religious, political, and military depth will provoke them to show the Sunnis their rabies and bare the teeth of the hidden rancor working in their breasts. If we succeed in dragging them into the arena of sectarian war, it will become possible to awaken the inattentive Sunnis as they feel imminent danger and annihilating death at the hands of these Sabeans [i.e., Shi'a]."¹²⁷

Zarqawi's ideology about the duties of every Muslim reflects his local context, and, as such, he further urges the martyr to participate in the fight against the Iraqi Shi'a.¹²⁸

Zarqawi stated in his letter that the best way to target the unbelievers, the Shia community, was through acts of martyrdom. Regarding the ideology of martyrdom, Zarqawi maintains consistency with al-Qaeda's ideas before September 11, 2001. He views martyrdom not only as an effective tactic, but also as a tactic that brings heavenly glory and God's praise. He says of his strategy toward the Shi'a, "as far as the Shi'a, we will undertake suicide operations and use car bombs to harm them."¹²⁹ He takes credit for some of the previous martyrdom operations, saying, "we were involved in all the martyrdom operations - in terms of overseeing, preparing, and planning - that took place in this country except for the operations that took place in the north. Praise be to Allah, I have completed 25 of these operations...There will be more in the future, God willing."¹³⁰ Notably, while Zarqawi's letter highlights the ideological shift in al-Qaeda's concept of the individual Muslim's duties, away from fighting the West and toward more

¹²⁶ Bunzel, "From Paper State to Caliphate," 14.

¹²⁷ Mansfield, *His Own Words*, 250-271.

¹²⁸ Bunzel, "From Paper State to Caliphate" 14; Mansfield, *His Own Words*, 265-270. Department Of State. The Office of Electronic Information, Bureau of Public Affairs. "Zarqawi Letter," February 12, 2004. <http://2001-2009.state.gov/p/nea/rls/31694.htm>.

¹²⁹ Department Of State. The Office of Electronic Information, Bureau of Public Affairs. "Zarqawi Letter," February 12, 2004. <http://2001-2009.state.gov/p/nea/rls/31694.htm>.

¹³⁰ Ibid.

directly targeting local Shi'a Muslims and establishing a caliphate immediately, he still advocates the use of martyrdom, a prominent ideology of al-Qaeda before September 11, 2001.¹³¹ Perhaps, in highlighting the martyr, Zarqawi hopes to inspire the Iraqi Sunni population that has been oppressed by a Shi'a government for years to find purpose and meaning in their lives and join his fight. Indeed, Zarqawi responds to his local context and harnesses years of frustration among the Iraqi Sunni', a population that had been often left out of Iraq's political narrative.

And, finally, Zawahiri responded to Zarqawi's 2004 letter of alliance to al-Qaeda. In his response letter, which was written in 2005, Zawahiri presented further support for the establishment of an Islamic state, illustrating a clear change from his ideology expressed in his book written after 2001. Zawahiri's letter also shed light on the importance of local political context as a driving force for the necessity to expand the individual duties of every Muslim. Zawahiri's physical detachment from Iraq is reflected in his ideology about the duties of every Muslim.¹³²

Zawahiri and Core al-Qaeda's Ideology about the Duties of a Muslim after 2003

As exemplified in his *Knights under the Prophet's Banner*, Zawahiri's ideology after September 11, 2001 hints at the individual Muslim's duty to help establish an Islamic State and ultimately a caliphate. However, by 2003, after the U.S. invasion of Iraq, Zawahiri's writings reflect a response to the localized conflict in Iraq. He responds with a more prominently articulated argument for the necessity of establishing an Islamic

¹³¹ Ibid.

¹³² Mansfield, *His Own Words*, 250–53.

State, diverging slightly from the core, prominent al-Qaeda ideology of global jihad that dominated his work before September 11, 2001. In a letter written in 2005 and intercepted by U.S. forces, Zawahiri responded to Zarqawi's proposed plans in Iraq. In his letter, Zawahiri lays out his four-step plan for jihad in Iraq. Zawahiri writes in response to the prominence of the American troops in Iraq and the conflicts that had arisen between the Sunni and Shi'a factions.

In his letter, while Zawahiri seemingly supports Zarqawi, his suggestions about how to treat the Shi'a population in Iraq, for example, further illuminate the ideological factions that already seemed to exist between Zarqawi's al-Qaeda in Iraq (AQI) and al-Qaeda under the tutelage of Osama Bin Laden. Zawahiri's letter identifies four obligations for all Muslims in Iraq: the expulsion of American forces, the establishment of the Islamic state, the expansion of jihad to neighboring territories, and ultimately confronting Israel.¹³³ While Zawahiri indicates his support for Zarqawi's vision of a caliphate, which also includes a necessary shifting perspective on the individual duties of a Muslim to include participating in the building of a caliphate, his letter indicates disapproval for Zarqawi's brutality toward Shi'a in Iraq. Additionally Zawahiri suggests that the establishment of the caliphate in Iraq would be a long process.¹³⁴

While Zarqawi views the establishment of the caliphate as an immediate duty placed upon every Muslim, Zawahiri does not view caliphate building as an immediate duty for all Muslims. Zawahiri suggests that the establishment of the caliphate is a long, multi step process that could take time. As Cole Bunzel documents, Zarqawi exemplifies the near term goal of the caliphate, saying "its establishment] could be [achieved] by our

¹³³ Bunzel, "From Paper State to Caliphate," 15.

¹³⁴ Ibid., 15-30.

hands.”¹³⁵ Zawahiri, however, describes the establishment of an Islamic state as near term, with the “hope” that it would become a caliphate. As Cole Bunzel explains, Zawahiri described the first two goals as “near-term.” Bunzel says further of Zawahiri: “He appeared optimistic, envisioning the Islamic state to be in the offing. He hoped that eventually it would ‘reach the status of the caliphate’.”¹³⁶ Zawahiri’s discourse on the establishment of an Islamic state and eventually a caliphate suggests that he foresees these Muslim obligations as long term. His sense of time remains constant with his perspectives in *Knights under the Banner of the Prophet*. While he advocates the establishment of a caliphate, Zawahiri suggests that there may be many stages to this plan. Zawahiri instructs Zarqawi to, “establish an Islamic authority or emirate, then develop it and support it until it achieves the level of a caliphate – over as much territory as you can to spread its power in Iraq.”¹³⁷ By suggesting an emirate or an Islamic authority first, Zawahiri indicates that maybe the caliphate is a long-term goal.¹³⁸ The discourse regarding the Muslim duty to establish the caliphate reflects the local context in Iraq. Zarqawi viewed the internal fighting, political discourse and instability as an opportunity to begin to lay the foundation for the caliphate.

While introducing the ideology of the individual duty of a Muslim to form an Islamic state, and eventually a caliphate, Zawahiri still affirms a central al-Qaeda ideology, that of the individual Muslim’s duty to wage jihad. Zawahiri explains that the goal to establish a caliphate still requires jihad, a jihad that must be waged by the mujahedeen and the domestic population. He says of the need for popular support of this

¹³⁵ Ibid., 15.

¹³⁶ Ibid., 16.

¹³⁷ Mansfield, *His Own Words*, 225.

¹³⁸ Ibid., 225–30.

jihad, “if we are in agreement that the victory of Islam and the establishment of a caliphate in the manner of the Prophet will not be achieved except through jihad against the apostate rulers and their removal, then this goal will not be accomplished by the mujahedeen movement while it is cut off from public support, even if the Jihadist movement pursues the method of sudden overthrow.”¹³⁹ While advocating the role of a jihadi movement, Zawahiri continually notes the essential participation of the whole nation. He says of the nation’s participation, “the jihad movement must be eager to make room for the Muslim nation to participate with it in the jihad for the sake of empowerment.”¹⁴⁰

One reason for Zawahiri’s urgent insistence on the participation of the entire community in the jihad movement is a response to Zarqawi’s brutal treatment of the Shi’a population in Iraq. While Zawahiri seemingly supports Zarqawi’s ideology of promoting the Islamic state, he warns Zarqawi to restrain his brutal violence, suggesting that he should not treat the Shi’a with such violence, and that instead he should unite Islam under one banner. He warns Zarqawi saying, “in short, in waging the battle the jihad movement must be in the middle, or ahead, of the nation. It must be extremely careful not to get isolated from its nation or engage government in a battle of the elite against the authority.”¹⁴¹ Zawahiri also notes that Zarqawi must not only foster positive relationships with the masses in Iraq, but also in neighboring countries. He says about these relationships, “if we look at the two short-term goals, which are removing the Americans and establishing an Islamic amirate in Iraq, or a caliphate if possible, then we see the strongest weapon which the mujahedeen enjoy- after the help and granting of success by

¹³⁹ Ibid., 257.

¹⁴⁰ Ibid., 209.

¹⁴¹ Ibid.

God is popular support from the Muslim masses in Iraq and surrounding countries.”¹⁴² Zawahiri’s letter to Zarqawi suggests not only a departure from the core ideology of al-Qaeda regarding the Muslim duty to perform jihad that was articulated before September 11, 2001, but it also suggests ideological divisions within the organization.¹⁴³

The lack of stress on global jihad and the role of the martyr in Zawahiri’s letter reflects a departure from the core al-Qaeda ideals, suggesting that perhaps the establishment of the Islamic state or caliphate is a more urgent issue for the Muslim community. Additionally, martyrdom is less central to the entire letter, and there is less of an emphasis on the power and role of the martyr in the promotion of the Islamic State. While Zawahiri articulates that jihad is necessary for achieving the Islamic State and ultimately a caliphate, Zawahiri focuses on the importance of establishing popular support among Muslims in Iraq. He believes that without local support and organization the jihad movement cannot be successful. While the act of expelling the Americans is foreseen as jihad in response to a threat, Zawahiri is no longer advocating for the expulsion of Western forces as much as unity within the Muslim world. By 2005, al-Qaeda called all Muslims to fulfill their individual obligations as true Muslims and participate in the formation of an Islamic state in the heart of the Middle East.¹⁴⁴

While I have relied heavily on the writings of two prominent leaders in the al-Qaeda organization in this section, the disagreements presented in Zarqawi’s letter written in 2004, and Zawahiri’s response in 2005 regarding the individual duties of every Muslim reflect more than a difference in leadership. The ideological shifts within the al-Qaeda organization about the concept of what it means to be a Muslim reflect a response

¹⁴² Ibid., 257.

¹⁴³ Ibid., 266–73.

¹⁴⁴ Ibid., 258–9.

to local context and not a generational gap between two leaders. While Zarqawi did promote stricter ideology toward the Shi'a community in Iraq, his call for the individual Muslim to promote the caliphate reflects the opportunities that he foresaw in Iraq. For Zarqawi, Iraq, in a state of civil war, American occupation, strife and violence was the perfect setting for the rise of a prominent Islamic state. In order to fulfill his aspirations of establishing a caliphate, he called on all Muslims to fulfill their obligations as true Muslims, to fight the Shi'a and further civil war, to fight the Americans and to establish an Islamic state in Iraq. Zawahiri's physical position in Pakistan left him isolated from the true happenings in Iraq and perhaps that is why he did not view the establishment of an Islamic state with the same urgency that Zarqawi did.

Conclusion

As articulated in Zawahiri's book *Knights under the Prophet's Banner* written after September 11, 2001, and especially his works circulated after the U.S. invasion of Iraq in 2003, the al-Qaeda core ideology regarding the individual duties of a Muslim began to change in response to September 11, 2001 and again in response to the introduction of American troops into Iraq in 2003. As demonstrated in Zarqawi's letter to Zawahiri in 2004, in Iraq there was a need to expand the conception of the individual duties of the Muslim. And, Zarqawi's ideas about the Shi'a population also present a stricter interpretation of Islam than Bin Laden's practices. Al-Qaeda's changing and expanding of the duties of a Muslim away from global jihad towards establishing an Islamic state and caliphate had lasting implications. Zarqawi's actions to further stimulate Sunni-Shi'a unrest also had lasting consequences. Although Zarqawi was killed in a 2006

airstrike, and replaced, his goals and ideologies would be furthered. The turmoil that developed in Iraq under Zarqawi would expand into Syria where the promotion of the individual Muslim's duty to help form an Islamic state produced a concrete territory.¹⁴⁵ Indeed, the changes demonstrated in the organizations ideology about the duties of a Muslim were a response to local political context. Zarqawi maintained the call to jihad while expanding the individual duties of every Muslim to perform jihad. Again, like Bin Laden, Zarqawi was responding with violence.

And lastly, while the al-Qaeda organization has changed both its location and ideologically since 2001, and while its members have sought to find their own identity, and respond to the necessity of state building in Iraq, the organization has also began to change its perspective of the West and what it means to be "Western." In the midst of redefining themselves, they are also redefining their enemies.

¹⁴⁵ "Abu Musab Al-Zarqawi Killed In Bombing Raid." Text.Article. *FoxNews.com*, June 8, 2006. <http://www.foxnews.com/story/2006/06/08/abu-musab-al-zarqawi-killedinbombing-raid.html>. "Insurgent Leader Al-Zarqawi Killed in Iraq," June 8, 2006. <http://www.washingtonpost.com/wp-dyn/content/article/2006/06/08/AR2006060800114.html>.

CHAPTER 3

The Rise of the Islamic State and Expansion of the Individual Muslim Duties

Introduction

Between 2006 and 2014 the legitimacy of the Islamic State and the state's ideology of the Muslim duties became solidified in Iraq and Syria. As noted in the last chapter, AQI leader Zarqawi's initial efforts to establish an Islamic State in 2006 failed. However, Zarqawi's treatment of the Shi'a community in Iraq and his strong advocacy for the Islamic State, his constant emphasis on offensive jihad and, his concern with neighboring rather than distant enemies, would set the ground work for the rise of the Islamic State of Iraq and eventually the Islamic State that we know today. Zawahiri only alluded to the establishment of the caliphate in his writings. Taking Zawahiri's ideals of the caliphate a step further, in Iraq Zarqawi worked tirelessly to advance the establishment of an Islamic State. However, it would not be until 2010 that a man named Abu Bakr al-Baghdadi brought Zarqawi's dreams to fruition and established the real Islamic State.¹⁴⁶

In 2006, AQI under volatile conditions, began to transform itself from a militant group into a fully-fledged state. The group was shaped both ideologically and also location, transforming into the official Islamic State in 2014. Expanding geographically beyond Iraq and into Syria, AQI ideologically became increasingly distanced from the core al-Qaeda leaders in Pakistan and Afghanistan. The process of state building took eight years, much conflict, and many leaders. But, by the end of eight years, AQI had become the Islamic State and had severed all ties with the core al-Qaeda organization. While breaking off from its core al-Qaeda roots, the Islamic State, also called for an

¹⁴⁶ Bunzel, "From Paper State to Caliphate," 1–20.

expansion of the obligations of every Muslim, reshaping the concept of the individual Muslim's duties and what it means to be a Muslim.¹⁴⁷

Today, diverging from core-al Qaeda ideology, the Islamic State is leveraging the concept of the individual Muslim's duties and obligations to include making *hijra* or migration to the Islamic State and emphasizing the need to fight for the success of the caliphate.¹⁴⁸ Elaborating the concept of Muslim's duty and obligation, the Islamic State is using foundational texts as justification to expand the requirements of all Muslims. Using religious scripture to formally solidify the duties of every Muslim, the Islamic State has created an environment in which Muslims who do not adhere to their obligations are considered opponents of the Islamic State and against God. The Islamic State has redefined what it means to be a Muslim and has expanded the individual duties of a Muslim beyond the five pillars of Islam and beyond Bin Laden's global jihad to include the duty for Muslims to help establish a caliphate and to participate in the conquest for physical territory. The Islamic State further more seeks to revive a certain type of jihad, the jihad of the Prophet Muhammad, an offensive jihad waged against neighboring enemies to promote the expansion of territorial conquest. The Islamic State has even gone as far as to pre mote the revival of slavery, a practice prevalent in Muhammad's time.¹⁴⁹

¹⁴⁷ Ibid. Mansfield, *His Own Words*, 245–258.

¹⁴⁸ *Hijra* is a term used to define the emigration of the Prophet Muhammad from Mecca to Medina. Muhammad's tribes were being persecuted so the Prophet encouraged all his followers to journey with him to Medina. *Hijra* is not one of the 5 pillars of Islam. While one pillar of Islam is hajj, a pilgrimage to Mecca, to visit the Ka'ba, this pilgrimage actually existed prior to Islam. In modern context, as the Islamic State aims to reinvent and emulate the time of Muhammad, the Islamic State has articulated that all Muslims should make *Hijra*, or emigration to the Islamic State.

¹⁴⁹ Wood, Graeme. "What ISIS Really Wants." *The Atlantic*, March 2015.

<http://www.theatlantic.com/magazine/archive/2015/03/what-isis-really-wants/384980/>; "Dabiq, 'The Return of the Khilafah.'" *Al Hayat*, September 2014, 5.

The Rise of the Islamic State

The rise of the Islamic State began in 2006 and the years of its development can be characterized by physical expansion, ideological divergences and changing leadership. Although many consider AQI leader Zarqawi to be the founder of the Islamic State, and, indeed, “although the movement has changed its name seven times and has had four leaders, it continues to treat Zarqawi as its founder, and to propagate most of his original beliefs and techniques of terror.”¹⁵⁰ Zarqawi was succeeded by Abu Hamza al-Muhajir also known as Abu Ayyub al-Masri. Very little is known about al-Masri, but he is believed to have been an Egyptian national who fought against U.S. forces in Afghanistan after the U.S. invaded it in 2001.¹⁵¹ Because he goes by two names, many scholars speculate that he is a foreigner. As noted by Eben Kaplan a writer for the Council of Foreign Relations, “al-Muhajir means "the emigrant," and his name has led most experts to speculate that he is not Iraqi.”¹⁵² Al-Masri’s leadership position was announced on AQI’s website and was particularly vague. Many suggest that perhaps the ambiguity was strategically orchestrated to protect al-Masri. He assumed power at a time when Iraq was in chaos. The United State’s military continued its process of “De-Ba’athification,” in which U.S. forces removed all of Saddam Hussein’s government

¹⁵⁰ Anonymous. “The Mystery of ISIS.” *The New York Review of Books*. Accessed March 29, 2016. <http://www.nybooks.com/articles/2015/08/13/mystery-isis/>; Bunzel, “From Paper State to Caliphate,” 13–47.

¹⁵¹ Kaplan, Eben. “Abu Hamza Al-Muhajir, Zarqawi’s Mysterious Successor (aka Abu Ayub Al-Masri).” *Council on Foreign Relations*, June 13, 2006. <http://www.cfr.org/iraq/abu-hamza-al-muhajir-zarqawis-mysterious-successor-aka-abu-ayub-al-masri/p10894>.

¹⁵²Ibid.

officials from power, leaving many Sunni Iraqi men jobless.¹⁵³ The U.S. also dismembered Saddam's army, leaving more Sunni men jobless, and these men knew how to fight. However, amid this chaos, many of Saddam's former government officials and military personal rallied behind al-Masri and AQI, forming an insurgency of militant fighters.¹⁵⁴

On October 15, 2006, al-Masri rebranded AQI as the Islamic State in Iraq (ISI). In the months following, the Islamic State in Iraq faced threats from the U.S. troop surge in 2007, in which President George.W.Bush sent more than 20,000 troops into Iraq to decrease violence and promote political stability. ISI also faced threats from local tribesmen, who were paid by the United States to cease fighting U.S. forces.¹⁵⁵ In the period between 2006 and 2013 to which Islamic scholar Cole Bunzel refers as "The Paper State," the Islamic State in Iraq continued to push back against U.S. military threats and tribal conflicts, fighting to gain influence in the region and establish a state modeled after the Prophet Muhammad.¹⁵⁶

In 2007 al-Masri was succeeded by Abu Umar al-Baghdadi. Under his leadership, ISI leaders have claimed to have set up courts and established structural institutions, further suggesting that they have made progress in the process of state formation.¹⁵⁷ Like

¹⁵³ Bathist party was as Arab nationalism and socialism. Saddam was a part of the bathis party. Bowering, Gerhard, Patricia Crone, Wadad Kadi, Devin J. Stewart, Muhammad Qasim Zaman, and Mahan Mirza, eds.. 2013. "Entries A-Z". In *The Princeton Encyclopedia of Islamic Political Thought*, edited by Gerhard Bowering, Patricia Crone, Wadad Kadi, Devin J. Stewart, Muhammad Qasim Zaman, and Mahan Mirza, 1-606. Princeton University Press. <http://www.jstor.org/stable/j.ctt1r2g6m.8>.

¹⁵⁴ Kaplan, "Abu Hamza Al-Muhajir, Zarqawi's Mysterious Successor (aka Abu Ayub Al-Masri)," 1.

¹⁵⁵*The Islamic State (Full Length)*. Documentary. Vice News, 2014. <https://news.vice.com/video/the-islamic-state-full-length>.

¹⁵⁶ Kaplan, "Abu Hamza Al-Muhajir, Zarqawi's Mysterious Successor (aka Abu Ayub Al-Masri)," 1.

¹⁵⁷ MCCLAM, ERIN. "Tracing the Rise of ISIS Into a Menace of Terror - NBC News," September 29, 2014. <http://www.nbcnews.com/storyline/isis-terror/tracing-rise-isis-menace-terror-n214266>.

al-Masri, little is known about Umar al-Baghdadi. He was killed in 2010 and his death would bring ISI even closer to state formation and the formation of a caliphate.¹⁵⁸

In April of 2010, the Islamic State in Iraq was propelled toward statehood by the appointment of a new leader, Abu Bakr al-Baghdadi, who brought legitimacy and a strict ideology to the growing ISI organization. Like his predecessors, little is known of al-Baghdadi. Most of our understanding of his governance has been through videos and recordings. A great speaker and well educated, al-Baghdadi claims to “trace his origins to Muhammad” from Samarra.¹⁵⁹ He claims to be from the Quraysh tribe, the same tribe as the prophet himself.¹⁶⁰ Based on this claim al-Baghdadi further claims that he is eligible to be a caliph.¹⁶¹ As such, his blood relation to the Prophet’s tribe makes him capable of being a caliph to an established state.

Ideologically, al-Baghdadi aligns with the Salafi-jihadi Muslims.¹⁶² Much like AQI’s first leader Zarqawi, al-Baghdadi has often directly targeted the Iraqi Shi’a community. Also like Zarqawi, al-Baghdadi is primarily focused on the offensive jihad and targeting the “near enemy,” the domestic populations, and Iraq, before attacking Bin Laden’s “far enemy,” the West. His call for the necessity of offensive jihad parallels his state building and the restoration of the territorial Islamic State built to restore God’s word. Al-Baghdadi harnessed the idea of offensive jihad and spent the years between 2011 and 2014 deploying his militant fighters into new territories, most notably Syria.¹⁶³

¹⁵⁸ Ibid.

¹⁵⁹ Bunzel, “From Paper State to Caliphate,” 23. MCCLAM, “Tracing the Rise of ISIS Into a Menace of Terror - NBC News.”

¹⁶⁰ Wood, “What ISIS Really Wants,” 1.

¹⁶¹ A caliphate is an established, Islamic authority that governs over a territory. Many Muslim scholars argue that the caliph must be a descendent of the prophet Muhammad’s family to have legitimacy.

¹⁶² Bunzel, “From Paper State to Caliphate,” 17–24.

¹⁶³ Ibid.

In 2011, seeking to expand the Islamic State in Iraq's reach, al-Baghdadi sent Iraqi ISI fighters into Syria to help the Syrian rebels fight against Syrian President Assad. Under the leadership of AQI fighter Abu Muhammad al-Julani, the Iraqi militants formed Jabhat al-Nusra or Nusra Front, a Sunni jihadist organization located in Syria. According to research generated at Stanford University as part of the "Mapping Militant Project" that began 2009, "al-Nusra began to rise to prominence among rebel organizations in Syria for its reliable supply of arms, funding, and fighters that came from a combination of foreign donors and AQI."¹⁶⁴ Al-Nusra's primary goal was "to overthrow the Assad regime, and it has called for an Islamic government to replace it."¹⁶⁵ Interestingly, unlike the Islamic State in Iraq, al-Nusra does not wish to establish an Islamic state, but an emirate.¹⁶⁶

Julani entered Syria on the brink of a civil war.¹⁶⁷ According to the Council of Foreign Relations, "tens of thousands of Syrian Sunnis joined rebel groups such as Ahrar al-Sham, the Islamic Front and al-Qaeda's Nusra Front, which all employ anti-Shia rhetoric."¹⁶⁸ Indeed, in Syria, in the chaos of civil war, Julani's rebels gained experience, power and recruited a large Syrian Sunni following. As Cole Bunzel has frequently stated, the Syrian war provided extremely beneficial for al-Nusra and the Islamic State in Iraq, who harnessed the frustration and anger of the Syrian Sunnis allowing for prominent

¹⁶⁴ "Jabhat Al-Nusra | Mapping Militant Organizations." Stanford University. Accessed March 30, 2016. <http://web.stanford.edu/group/mappingmilitants/cgi-bin/groups/view/493>.

¹⁶⁵ Ibid.

¹⁶⁶ Ibid. An emirate is an established authority. It will then develop until it achieves caliphate, where an established authority has territory. The Taliban consider their rule in Afghanistan to be an emirate.

¹⁶⁷ The Syrian civil war, which had begun as a series of protests in 2011, was a response to years of Ba'athist President Assad's oppression of the Sunni majority in Syria.

¹⁶⁸ "The Sunni-Shia Divide." *The Council on Foreign Relations*, 2004. <http://www.cfr.org/sunnishia>.

growth within al-Nusra both in numbers and experience.¹⁶⁹ Al-Baghdadi's call for offensive jihad in Syria angered core al-Qaeda leaders because they felt that they were not included in the tactical discussions. However, al-Baghdadi responded to his local context, he saw the opportunities to gain territory provided by chaos and unrest as a means for facilitating the growth of the Islamic State in Iraq.¹⁷⁰

Al-Baghdadi's tactical decision to move his militants into Syria via Julani's al-Nusra group angered core al-Qaeda leaders who, operating from inside Pakistan and Afghanistan felt disconnected from the happenings in Iraq and now Syria. Al-Qaeda had not been consulted prior to the territorial expansion of al-Baghdadi's militant organization into Syria. Frustrated with the lack of communication and information from al-Baghdadi, core al-Qaeda in leaders in Pakistan and Afghanistan became even more distanced from the Islamic State in Iraq.¹⁷¹ Core al-Qaeda also disapproved of al-Baghdadi's treatment of the Iraqi Shi'a. Similar to AQI Zarqawi's anti-Shi'a sentiment, al-Baghdadi also harnessed the tactic of persecuting Shi'a communities in Iraq. Al-Baghdadi was equally concerned with waging jihad against the Shi'a as he was concerned about waging jihad against American forces in Iraq.¹⁷² In one particular instance, while Baghdadi released many Iraqi prisoners he also simultaneously conducted attacks on the Shi'a Iraqis. Already disagreeing with core al-Qaeda over internal affairs in Iraq, core al-Qaeda were equally concerned with the affairs of the Islamic State in Iraq's expansion in Syria, specifically with the formation of al-Nusra. Interestingly, while al-

¹⁶⁹ "Jabhat Al-Nusra | Mapping Militant Organizations." Stanford University. Accessed March 30, 2016. <http://web.stanford.edu/group/mappingmilitants/cgi-bin/groups/view/493>.

¹⁷⁰ Ibid.

¹⁷¹ Bunzel, "From Paper State to Caliphate," 24–6.

¹⁷² Ibid., 20.

Baghdadi assumed that Julani and his al-Nusra group would feel loyal to its roots, the Islamic State in Iraq, al-Nusra actually looked to core al-Qaeda as its authority.¹⁷³

On May 9, 2013, al-Baghdadi, blindly, and under the pretence of cooperation, announced that his Islamic State of Iraq was merging with the al-Nusra to form a new umbrella organization entitled the Islamic State of Iraq and the Levant or Islamic State of Iraq and Syria (ISIL or ISIS).¹⁷⁴ Leaders of the al-Nusra group in Syria immediately contradicted al-Baghdadi's announcement. Many of the al-Nusra saw their loyalties as being to al-Qaeda and not to al-Baghdadi and the Islamic State of Iraq.¹⁷⁵ Although al-Nusra had previously received the support of al-Baghdadi, they sought alliance with al-Qaeda's al-Zawahiri.¹⁷⁶

After much internal fighting within the al-Qaeda organization and its affiliates, between 2013 and 2014 al-Qaeda core officially and publically severed all affiliations from al-Baghdadi's Islamic State of Iraq and Sham in 2014. In a statement made February 2, 2014, Zawahiri officially disassociated from the Islamic State of Iraq and Sham, citing al-Qaeda's disapproval of the constant acts conducted toward civilian Shi'a

¹⁷³ Ibid., 22–28; MCCLAM, ERIN. “Tracing the Rise of ISIS Into a Menace of Terror - NBC News,” September 29, 2014. <http://www.nbcnews.com/storyline/isis-terror/tracing-rise-isis-menace-terror-n214266>.

¹⁷⁴ MCCLAM, ERIN. “Tracing the Rise of ISIS Into a Menace of Terror - NBC News,” September 29, 2014. <http://www.nbcnews.com/storyline/isis-terror/tracing-rise-isis-menace-terror-n214266>.

¹⁷⁵ Ibid.

¹⁷⁶ “Jabhat Al-Nusra | Mapping Militant Organizations.” Stanford University. Accessed March 30, 2016. <http://web.stanford.edu/group/mappingmilitants/cgi-bin/groups/view/493>; “Al Qaeda-Affiliated Groups: Middle East and Africa.” Accessed March 29, 2016. <http://fas.org/sgp/crs/mideast/R43756.pdf>; MCCLAM, ERIN. “Tracing the Rise of ISIS Into a Menace of Terror - NBC News,” September 29, 2014. <http://www.nbcnews.com/storyline/isis-terror/tracing-rise-isis-menace-terror-n214266>.

and the group's extremist violence. And, indeed, without the leadership of core al-Qaeda, al-Baghdadi went one step further by establishing a caliphate.¹⁷⁷

On June 29, 2014 al-Baghdadi officially declared himself the caliph of the Islamic State of Iraq and Sham. Interestingly, while core al-Qaeda always viewed the establishment of a caliphate as a long-term goal, ISIS brought such ideology to fruition. A statement from ISIS made shortly after the announcement of the caliphate declared: “the time has come for those generations that were drowning in oceans of disgrace, being nursed on the milk of humiliation, and being ruled by the vilest of all people, after their long slumber in the darkness of neglect — the time has come for them to rise.”¹⁷⁸ Baghdadi asked for groups to accept his authority and renamed his caliphate “the Islamic State.” According to Cole Bunzel, “Baghdadi was the new leader, all should give oaths of fealty to him and the state.”¹⁷⁹ Core al-Qaeda leaders quickly denied al-Baghdadi's legitimacy as caliph. Issuing his own statement, al-Zawahiri said, “that the Islamic State is merely a battleground and not a state.”¹⁸⁰ Furthermore, al-Qaeda continually stressed the process of the establishment of a caliphate in the form of stages, suggesting that al-Baghdadi had foregone such stages and jumped to the conclusion. Lastly, al-Qaeda responded by promoting their own caliph, Taliban leader Mullah Muhammad Umar-head of the Islamic Emirate of Afghanistan since 1996.¹⁸¹

The ideology of the Islamic State is a brand of Jihadi Salfism that extends past the ideals of al-Qaeda in practice and extremism. The Islamic State identifies with the Jihadi

¹⁷⁷ Ibid.

¹⁷⁸ Vick, Karl. “ISIS Dares to Declare Restoration of the Islamic Caliphate.” *TIME.com*, June 29, 2014. <http://time.com/2938317/isis-militants-declare-islamist-caliphate/>.

¹⁷⁹ Bunzel, “From Paper State to Caliphate,” 19.

¹⁸⁰ Ibid.

¹⁸¹ Ibid., 31–5.

Salafi group, a Sunni group that practices an extremely rigorous reading of religious scripture and texts. This ideology has two major influences: the Muslim Brotherhood, which developed in Egypt, and Salfism, which developed in the Arabian Peninsula. Firstly, the Brotherhood, Sunni in identity, promotes the restoration of the caliphate. However, in their doctrine, they address this aspiration as a mere ideological dream, never taking any steps to implement or form a caliphate and instead have focused more on gaining political legitimacy.¹⁸² Secondly, the Islamic State takes the Salafi designation, a Sunni theological movement that stresses purifying the faith, returning to the foundational sources, and promoting God’s oneness while eliminating corruption. Like al-Qaeda who often harkened to Ibn Taymiyya, Salfism relies heavily on the fourteenth century scholar.¹⁸³ Princeton scholar Bernard Haykel notes that Salafi’s are,

“committed to expanding *Dar al-Islam*, the land of Islam, even, perhaps, with the implementation of monstrous practices such as slavery and amputation—but at some future point. Their first priority is personal purification and religious observance, and they believe anything that thwarts those goals—such as causing war or unrest that would disrupt lives and prayer and scholarship—is forbidden.”¹⁸⁴

The Islamic State has demonstrated their Salafi tendencies particularly in their adaptation of certain practices like slavery, a common practice during the prophet Muhammad’s time, and in their expansion of the individual duties of a Muslim.

As demonstrated, al-Qaeda and ISIS are Salafis who think that war and unrest sometimes hinder their first priority of religious purification. However, al-Qaeda and the Islamic State have caused unrest, with al-Qaeda focused more on destroying the far

¹⁸² Ibid., 7–11.

¹⁸³ Ibid.

¹⁸⁴ Wood, Graeme. “What ISIS Really Wants.” *The Atlantic*, March 2015.

<http://www.theatlantic.com/magazine/archive/2015/03/what-isis-really-wants/384980/>.

enemy, the West and ISIS more concerned with a localized fight and the establishment of a caliphate. Interestingly, focusing on the local context has required the Islamic State to expand their conception of what it means to be a Muslim. The Islamic State has harkened backed to foundational sources and practices, even promoting the revival of slavery. Additionally, while building a state, the Islamic State has found the expansion of the individual duties of a Muslim a necessity, calling on all able Muslims to not only wage jihad but also to make *hijra* or pilgrimage to the state.¹⁸⁵

Although there is a tendency to view the trajectory of the Islamic State and its formation and establishment of the caliphate through the lens of leadership, the changing ideologies, especially regarding the duties of individual Muslims reflect much more a response to local context than to specific leaders. While I have followed in Cole Bunzel's way, demonstrated in his "From Paper State to Caliphate," by tracing the progression of the Islamic State through its leaders, it is important to note that the ideological shifts within the organization, specifically the expansion of the Muslim's duties are not a reflection of the specific leaders but a reflection of necessity and local context. However, tracing the changing leadership of the Islamic State provides a clear chronological demonstration of the changes within the organization over time and how the state came into being.

¹⁸⁵ Ibid. Bunzel, "From Paper State to Caliphate," 1–20.

The Islamic State Expands the Individual Duties of a Muslim to include *Hijra*, Offensive *Jihad* and the Establishment of the Caliphate

Expanding on the al-Qaeda ideology of defensive jihad, the Islamic State has harnessed the ideology and language of the Muslim duties to go beyond just a call for jihad. Now, the Islamic State articulates that every Muslim is obligated to establish and promote a caliphate in response to the end of time. And, all true Muslims must acknowledge the caliph, Abu Bakr al-Baghdadi as their leader. As Bernard Haykel and Cole Bunzel state of the importance of supporting the caliph,

“the Islamic State argues that all Muslims, including all jihadist factions, must acknowledge the caliph as their leader if they are not to live in sin. Though this notion of a collective religious obligation is largely consistent with traditional Islamic law, most Muslims consider such injunctions irrelevant in the modern age.”¹⁸⁶

According to the Islamic State, all able individual Muslims are obligated to participate in the establishment of the Islamic State in preparation for the end of time. This Muslim duty is proposed as a communal obligation. According to the Islamic State, and perhaps out of necessity and in response to the physical territory of which the state now governs, state formation is an obligation. Indeed, the Islamic State is altering their perception of the individual duties of a Muslim according to their local context, that of state building.

As highlighted in the first issue of *Dabiq*, a magazine published by the Islamic State, produced in English, which recounts current events, textual legitimation for the group and ideological justification, the time has come for the creation of an Islamic State. The magazine states, “the spark has been lit here in Iraq, and its heat will continue to

¹⁸⁶ Haykel, Bernard, and Cole Bunzel. “A New Caliphate?” *Project Syndicate*, July 10, 2014. <http://www.project-syndicate.org/commentary/bernard-haykel-and-cole-bunzel-consider-the-implications-of-the-islamic-state-s-declaration-of-a-caliphate>.

intensify – by Allah’s permission – until it burns the crusader armies in Dabiq.”¹⁸⁷ In a monumental sermon, in which al-Baghdadi appeared publically at Friday prayer in Mosul in July of 2014, and recounted by Wood, al-Baghdadi spoke of the obligation of the Muslim to revive the caliphate, saying, “that to revive the institution of the caliphate—which had not functioned except in name for about 1,000 years—was a communal obligation.”¹⁸⁸ Baghdadi further said, “This is a duty upon the Muslims—a duty that has been lost for centuries ... The Muslims sin by losing it, and they must always seek to establish it.”¹⁸⁹

Haykel notes that the desire to emulate the caliphate of the Prophets’ time is seen as a strict duty that has been revived with vigor. He says of this duty, “leaders of the Islamic State have taken emulation of Muhammad as a strict duty, and have revived traditions that have been dormant for hundreds of years. “What’s striking about them is not just the literalism, but also the seriousness with which they read these texts.”¹⁹⁰ Interestingly, while the Islamic State believes that not only is the establishment of the caliphate necessary, but that it has been written into history already. Indeed, the time is right and so Muslims must respond accordingly and with vigor. As Wood notes of the Islamic State’s place in history, “the Islamic State differs from nearly every other current jihadist movement in believing that it is written into God’s script as a central character. It is in this casting that the Islamic State is most boldly distinctive from its predecessors, and clearest in the religious nature of its mission.”¹⁹¹ The Islamic State responds to their

¹⁸⁷ “Dabiq, ‘The Return of the Khilafah,’” 5.

¹⁸⁸ Wood, “What ISIS Really Wants.”

¹⁸⁹ Ibid.

¹⁹⁰ Ibid.

¹⁹¹ Ibid.

local context, altering the definition of the true Muslim to incorporate preparation for the end of time and state building.

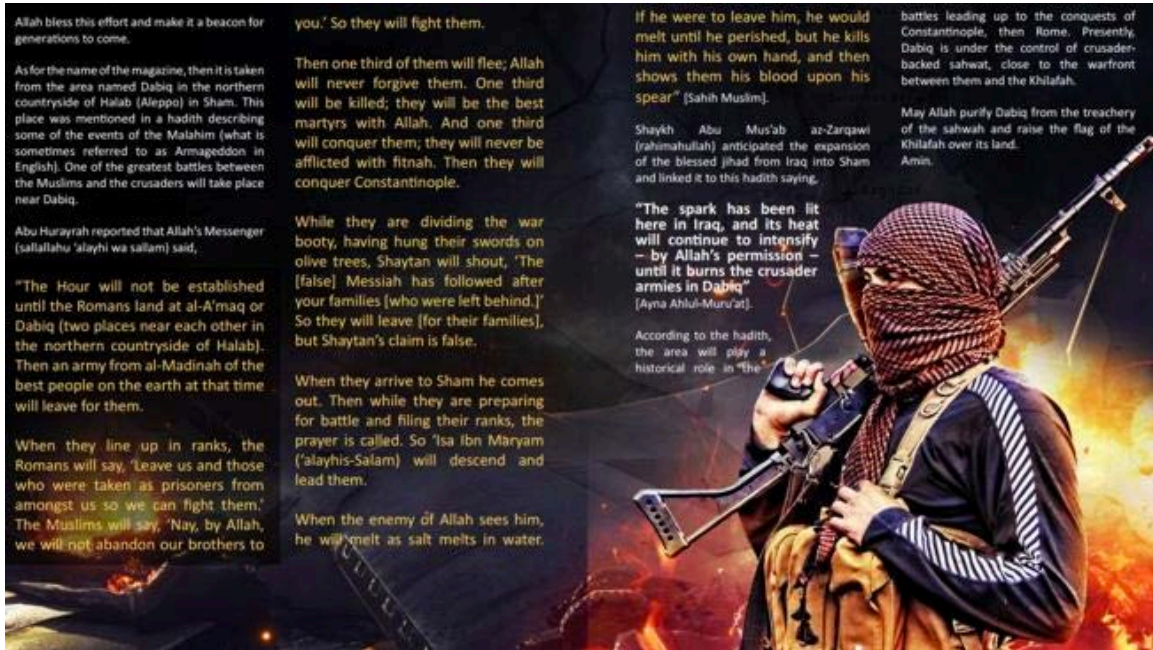


Fig 2. The Islamic State places particular emphasis on the fighter and the necessity to make hijra to the caliphate and wage jihad in the name of the caliphate. This image was taken from the first issue of Dabiq, symbolizing the importance of the fighter and the establishment of the caliphate.¹⁹²

The notion of an apocalypse is another difference between al-Qaeda propaganda and ideology and the Islamic State's propaganda. Leaders of al-Qaeda, who have viewed the establishment of the caliphate as a far off obligation, also viewed the end of time in this manner. The Islamic State, however, has already addressed the establishment of the caliphate, as a response to their fundamental belief that the end of time is near (See Figure 2). Indeed, Wood notes, "End of Days is a leitmotif of its propaganda. Bin Laden rarely mentioned the apocalypse, and when he did, he seemed to presume that he would

¹⁹² "Dabiq, 'The Return of the Khilafah,'" 4.

be long dead when the glorious moment of divine comeuppance finally arrived.”¹⁹³ Acknowledging the factor of time, the Islamic State’s vision of the individual Muslim’s duties reflects this notion that the end of time is near.

While Bin Laden and al-Qaeda exemplified the primary duty of a Muslim as one of performing defensive jihad in response to Western threats, the Islamic State harnesses the language of the Muslim’s duty to fit their own historical, local context. For the Islamic State, the most immediate and primary duty of Muslim’s is now to perform *hijra* or emigration to the Islamic State. The Islamic State is expanding the duties of a Muslim to include *hijra*, an essential necessity for the purpose of creating a population and a state. In *Dabiq*, *hijra* is displayed above all other duties. Acknowledging that al-Qaeda in the Arabian Peninsula and Bin Laden alike have referenced the ideal situation in which a mujahedeen might come to al-Qaeda, thus performing *hijra*, Zawahiri and Bin Laden both have spent far less time emphasizing the necessity of the *hijra*.¹⁹⁴ Highlighted in the first issue of *Dabiq*, the magazine encourages all to join the state, saying,

“therefore, rush O Muslims to your state. Yes, it is your state. Rush, because Syria is not for the Syrians, and Iraq is not for the Iraqis. The earth is Allah’s. {Indeed, the earth belongs to Allah. He causes to inherit it whom He wills of His servants. And the [best] outcome is for the righteous} [Al-A’raf: 128].”¹⁹⁵

The duty of *hijra* is obligatory, the first priority of every Muslim, for it is necessary to build a state. The second issue of *Dabiq* notes such obligations, stating, “the State is a state for all Muslims. The land is for the Muslims, all the Muslims. O Muslims everywhere, whoever is capable of performing *hijra* (emigration) to the Islamic State,

¹⁹³ Wood, “What ISIS Really Wants,” 1; “Dabiq, ‘The Return of the Khilafah,’” 5.

¹⁹⁴ “Dabiq, ‘The Return of the Khilafah,’” 1-10.

¹⁹⁵Ibid., 1.

then let him do so, because hijra to the land of Islam is obligatory.”¹⁹⁶ Most importantly, *Dabiq* stresses that the *hijra* is the first priority of all Muslims, stating, “The first priority is to perform *hijra* from wherever you are to the Islamic State, from dārul-kufr to dārul-Islām.”¹⁹⁷ Emphasizing the need for *hijra* for the success of the Islamic State, much of the Islamic State propaganda highlights such *hijra* as an individual duty.¹⁹⁸

The Islamic State explains that the need to perform *hijra* is an individual obligation and one that is connected to jihad. In the first issue of *Dabiq*, the Islamic State calls all Muslims to make *hijra* to the Islamic state, saying, “we call them and remind them to fear Allah, for their emigration is wajib ‘ayni (an individual obligation), so that they can answer the dire need of the Muslims for them.”¹⁹⁹ The Islamic State explains the call to *hijra* as attached to the jihad, which threatens the very land of the Muslim warrior. *Dabiq* states, “hijra has been a pillar inherent to jihad, particularly in eras void of darul-Islam. Allah’s Messenger (sallallahu ‘alayhi wa sallam) said, “hijra will not cease as long as there is jihad.”²⁰⁰ Because of the threats that are upon Islam and the subsequent need to expand territory, the physical Islamic State provides a safe haven for fighters.

Consequently the role of physical land, established by the Islamic State provides those that are under threat with a safe haven. Thus, the Islamic State identifies itself as a safe haven exemplifying the practicality of *hijra*, saying, “because there were almost no safe havens on the earth left for the mujahidin, the ideal land for *hijra* was a place where they could operate without the threat of a powerful police state. In the case of Abu Mus’ab (Zarqawi), he chose Afghanistan and later Kurdistan as a base to form Jama’at

¹⁹⁶ Ibid.

¹⁹⁷ "Dabiq, 'the Flood,'" 3.

¹⁹⁸ "Dabiq, 'The Return of the Khilafah,'" 2.

¹⁹⁹ Ibid., 11.

²⁰⁰ Ibid., 35.

al-Tawhid wal-Jihad.”²⁰¹ According to the Islamic State it is necessary to perform *hijra* because fighters are under attack and the state needs Muslims to help fight for the expansion of the state and participate in the building of the state.²⁰²

Through the claim to a legitimate caliphate and a foundation of physical territory, the Islamic State’s call for jihad is not one of defensive jihad as Bin Laden frequently advocated, but actually one of offense. The offensive jihad is done to promote the expansion of the Islamic State, to wage war against neighboring states and to gain more physical territory. According to Haykel and Bunzel, the expansion of the Islamic state is one that ignoring borders is performed to expand Islam. Haykel and Bunzel note, “as conceived in Islamic political thought, a caliphate, unlike a conventional nation-state, is not subject to fixed borders. Instead, it is focused on defending and expanding the dominion of the Muslim faith through jihad, or armed struggle.”²⁰³ Wood notes that the offensive jihad would not be possible without the physical territory that the Islamic State now controls. Wood says of the Islamic State waging offensive jihad, the Islamic State “has already taken up what Islamic law refers to as ‘offensive jihad,;’ the forcible expansion into countries that are ruled by non-Muslims.”²⁰⁴...Indeed, Wood furthers, “without a caliphate, offensive jihad is an inapplicable concept. But the waging of war to expand the caliphate is an essential duty of the caliph.”²⁰⁵ In this manner state building and jihad go hand and hand.

Accordingly, the caliphate has a responsibility to continue the promotion of the caliphate every year. “The caliph must wage jihad at least once a year. He may not rest,

²⁰¹ Ibid.

²⁰² “Dabiq ‘The Return of the Khilafah,’ 2-6; “Dabiq ‘the Flood,’” 1-10.

²⁰³ Haykel and Bunzel, “A New Caliphate?” 1.

²⁰⁴ Wood, “What ISIS Really Wants,” 1.

²⁰⁵ Ibid.

or he will fall into a state of sin.”²⁰⁶ The Islamic State distinguishes believers and non-believers saying that those that do not promote the caliphate are unbelievers. And, those that rebel against the caliphate or refuse the legitimacy of the territory and refuse to promote offensive jihad are unbelievers and should be fought. As explained in the first issue of *Dabiq*,“ as such, anyone who rebels against its authority inside its territory is considered a renegade, and it is permissible to fight him after establishing the hujjah against him (i.e. clarifying his error to him with proof).”²⁰⁷ Under these circumstances, jihad remains an individual obligation for all Muslims.

Diverging from al-Qaeda, al-Baghdadi has noted that offensive jihad is more important for the development of the caliphate now, than the defensive jihad toward the West. Al-Baghdadi has continuously stressed dealing with the internal Muslim community first, before waging defensive jihad. Wood notes that the Islamic State views their enemies as both domestic and foreign, saying, “it sees enemies everywhere around it, and while its leadership wishes ill on the United States, the application of Sharia in the caliphate and the expansion to contiguous lands are paramount. Baghdadi has said as much directly: in November he told his Saudi agents to “deal with the *rafida* [Shia] first ... then *al-Sulul* [Sunni supporters of the Saudi monarchy] ... before the crusaders and their bases.”²⁰⁸ The defense of the Islamic State still must take place, however, while spreading the influence and territory of the state. As noted in the eleventh issue of *Dabiq*, “The call to defend the Islamic State – the only state ruling by Allah’s Sharī’ah today – continues to be answered by sincere Muslims and mujāhidīn around the world prepared to sacrifice their lives and everything dear to them to raise high the word of Allah and

²⁰⁶ Ibid.

²⁰⁷ “Dabiq, ‘The Return of the Khilafah,’” 27.

²⁰⁸ Wood, “What ISIS Really Wants,” 1.

trample democracy and nationalism.”²⁰⁹ Indeed, the Islamic State is responding to their local context, their state buildings by expanding the duties of a Muslim not only to mesh with their local context but also benefit their local context.

Lastly, the Islamic State’s propaganda revives the necessity and power of the martyr. Like al-Qaeda before September 11, 2001, the Islamic State literature demonstrates the importance of the martyr in the cause for the establishment and maintenance and success of the Islamic State. *Dabiq* continually praises the martyr saying: “Abdur-Rahman Ibn ‘Abd Rabbil-Ka’bah narrated, saying, Whoever wishes to be saved from the fire and enter paradise should die believing in Allah and the Last Day, and should treat people the way he wishes to be treated. Whoever pledges allegiance to an imam, giving him his hand in sincerity, should obey him as much as he is able to.”²¹⁰ Not only are martyrs seen as the most holy, they are also revered as the best fighters. As recalled in the very first issue *Dabiq*, the Islamic State has revived the language of the Muslim’s duty and promoting the martyr, saying: “The Muslims will say, ‘Nay, by Allah, we will not abandon our brothers to you.’ So they will fight them “Then one third of them will flee; Allah will never forgive them. One third will be killed; they will be the best martyrs with Allah. And one third will conquer them; they will never be afflicted with fitnah.”²¹¹ The articulation of the Muslim to be a martyr is another example of how the Islamic State has harnessed the language of duties to fit their context, in which martyrs can only help and facilitate the promotion of the Islamic State. Perhaps like Bin Laden and Zawahiri, the Islamic State hopes to appeal to the many Sunni’s who are frustrated with the failures of the Arab Spring and providing them a new purpose.

²⁰⁹ “Dabiq, ‘The Laws of All or the Laws of Men,’” 4.

²¹⁰ “Dabiq, The Return of the Khilafah,” 5.

²¹¹ Ibid.

Conclusion

While writing themselves into the prophetic history of the Prophet Muhammad, and in preparation for the end of time, the Islamic State has harnessed the language and concept of the individual duties and obligations of a Muslim to fit the necessity of maintaining their caliphate and also in acknowledgement of the end of time. Bringing Zarqawi's ideals to true fruition, and through their self-developed and self-produced literature, videos, magazines and writings alike, the Islamic State brings profound revival to the necessity of supporting and fighting for the progress and success of an Islamic State. As such, the Islamic State places new emphasis on the obligation of the able Muslim to perform *hijra* to the state. In maintaining the individual obligation of the *hijra*, the Islamic State, diverges from al-Qaeda's defensive jihad, instead promoting the martyr to fight offensively to expand the caliphate.²¹² The Islamic State's expansion of the individual obligations of every Muslim reflects a response to local necessity. Indeed, without Muslim migration to the Islamic State, the state will not function. It needs active, participating citizens who are willing to fight to increase the territory of the Islamic State and maintain its existing lands. The expansion of Muslim duties reflects a response to local context.

Epilogue

Throughout time and space, al-Qaeda and the Islamic State's call for the individual to perform jihad has remained constant. Just as Bin Laden called all able-bodied Muslims to perform jihad, the Islamic State insists that jihad is an individual obligation required of all Muslims. Why did the concept of the individual duty of the Muslim to perform jihad remain? The individual call for all Muslims to perform jihad is an ideological response to local context done out of necessity. For Bin Laden, it was necessary to wage jihad and to expel the Soviets from Afghanistan. For Zarqawi, it was necessary to fight the Americans and the Shi'a in Iraq. For al-Baghdadi and the Islamic State, the individual obligation to perform jihad is necessary to promote the Islamic State. Local, political context has required a response, a call for all individuals to perform jihad. Interestingly, in response to local context, al-Qaeda and Bin Laden have continuously called for more violence and perhaps only further contributed to the violence and chaos in the Middle East.

And, while al-Qaeda and now the Islamic State, have sought their own self-definition while maintaining a call to jihad, the organization has also expanded its definition and perception of the West. Changing as a physical organization, expanding into a self developed caliphate and ideologically expanding their interpretations of the duties of an individual Muslim, the 2001 terrorist attacks conducted by Bin Laden towards the United States and the 2015 Paris Attacks orchestrated by ISIS reflect a changed perception of the West. In 2001, Bin Laden's grand spectacle of terror targeted the political and economic institutions of the United States, The World Trade Center and the Pentagon. For Bin Laden, American politics, the Bush administration and Wall Street

were manifestations of moral corruption. Bin Laden wanted his terror to be a spectacle, and he was concerned with the image of the attack. Much like al-Qaeda, the Islamic State has also placed special emphasis on the information and image that they are portraying in the world. On November 13, 2015, the Islamic State orchestrated a series of attacks in Paris that did not target the economic and political systems within France, but instead the cultural centers of Paris. The attackers attacked the people of France and the culture of France targeting the Stade de France, a sports stadium, Bataclan Concert Hall where an American Band, Eagles of Death Metal was performing, along with cafes, nightclubs and bars. Since Bin Laden's al-Qaeda, the Islamic State has extended its own definition of their enemies to include the culture of the West at large and not simply the political and cultural elite. And, even more recently, in Brussels Belgium on March 22, 2016, the Islamic State claimed accountability for terrorist attacks on the subway and the Brussels Airport. Again, these attacks target civilians and centers of mass transportation, not political or economic elites.

As previously demonstrated, interpretations of the individual duty of the Muslim to perform jihad have changed over time. In the first generation the duty of jihad was a collective offensive duty, done by a select few on behalf of the community for the promotion of Islam. There was no individual duty to wage jihad against enemies. The fourteenth century work of Islamic scholar Ibn Taymiyyah's introduced a new kind of jihad, one that was not intended to spread Islam, but, instead a defensive jihad in response to foreign invasion. Bin Laden responded to the Soviet occupation in Afghanistan in 1980 and the U.S. occupation of Saudi Arabia during the First Gulf War by calling all Muslims to perform defensive jihad. In 2001 Bin Laden funded and orchestrated a terrorist attack

on American symbols of economic and political greatness. Responding to the violence of 2001, the U.S. invaded Afghanistan in 2001 and Iraq in 2003. And in response to a Western presence in Iraq in 2003, Zarqawi called all Muslims to perform the individual duty of defensive jihad. In doing so, he also began a conversation about the individual duty of every Muslim to restore a caliphate that emulated the first generation. Since 2014 the Islamic State has adapted the ideas of individual duty to perform jihad, advocating an offensive jihad to spread the territory of the state. The Islamic State has also expanded the individual duties of a Muslim to include making *hijra* to the Islamic State. Over time al-Qaeda and the Islamic State have changed and expanded the duties of an individual Muslim, redefining what it means to be a Muslim.

While acknowledging that al-Qaeda has evolved both in self definition and in its definition of the West, the last seventy years in the Middle East have been marked by political, social, and religious tensions and the region has exploded with violence. Christians, Jews, Muslims fight for territory, legitimacy, political autonomy and morality among themselves and against each other. Why is the Middle East in turmoil and why specifically is the Muslim world in turmoil? Nestled within this context of violence, what does it mean in the modern world to be a Muslim? In analyzing how radical groups like al-Qaeda and the Islamic State have viewed the individual duties of a Muslim sheds light on the existing violence in the Middle East and how interpretations of the individual duties of all Muslims have contributed to such violence. Al-Qaeda and the Islamic State have interpreted what it means to be a Muslim and the individual obligations of every Muslim differently over time, expanding their own definitions of the Muslim in response to local context and perhaps harnessing internal frustrations too. Furthermore the

consistent emphasis on the individual's obligation to perform jihad, which has remained prevalent within al-Qaeda ideology and has been adapted by the Islamic State has only helped facilitate the violence in the region. Tracking how al-Qaeda views the duties of the individual Muslim through time and space explains how al-Qaeda and the Islamic State have responded to their contexts with violence and how they have responded to a Western presence in the Middle East.

Al-Qaeda and the Islamic State have both changed and expanded their interpretations of the individual duties of Muslims over time in response to internal failures within the organization and in response to local contexts and the role of the West in the Middle East. Local political context and perhaps frustration regarding the failure of radical Islamic movements throughout history have contributed greatly to al-Qaeda's ideological changes. Historically, Islamist groups have failed to gain political, religious and social recognition in the Middle East, requiring new groups like al-Qaeda to develop, and employ new tactics and provide new interpretations regarding the ideology of the individual duties of a Muslim. In the 1930's Hasan al-Banna's Muslim Brotherhood failed to gain political recognition in Egypt. It was under these circumstances of oppression that al-Qaeda grew out of the wake of a failed Muslim Brotherhood in 1970. Bin Laden responded to the failures of the Muslim Brotherhood and was able to harness these frustrations to create a powerful organization in the late 1980s. More recently, in 2011 the Arab Spring failed to legitimize Islamists groups, as organizations like the Muslim Brotherhood were unable to maintain political control in Egypt. It was in the aftermath of these failures that the Islamic State gained significant traction and territory in Iraq and Syria. The constant oppression by regimes, monarchs, political infrastructures

and religious organizations alike has only facilitated a sense of anger, distrust and frustration from militant groups.

Although it would be easy to say that groups like al-Qaeda are radical and irrational in their interpretation of Islam, and that their changing ideology regarding the Muslim duties has no merit or reason, in reality these changes in the interpretation of the individual Muslim duties reflect a change in local context. Al-Qaeda's interpretation and ideology of the Muslim duty to perform jihad, changed in response to his local context, and especially Western involvement in the Middle East. Bin Laden's al-Qaeda developed in 1988 as a response to the local context, the Soviet occupation of Afghanistan from 1979-1989. Al-Qaeda was also responding to the Western threats of the United States presented in the First Gulf War of 1990 when Iraq annexed and invaded Kuwait. During this period the United States, under president George H.W. Bush sent American troops into Saudi Arabia, setting up camps and bases. This occupation of "The Two Holy Places," (Mecca and Medina) by Western forces, was, for Bin Laden a direct threat to the purity of Islam and required a call for jihad. According to Bin Laden, defensive jihad was a response to pre existing violence instigated by the Western occupation.

Although the September 11, 2001 attacks left the West shocked and angered, the terrorist attacks achieved very little for the al-Qaeda organization and only further facilitated the need for changing ideology within the al-Qaeda organization and perhaps encouraged the rise of the Islamic State. As a result of September 11, the U.S. invaded Afghanistan in 2001 and Iraq in 2003. Al-Qaeda became largely decentralized, operating out of hiding. Eventually, Bin Laden was killed in Pakistan. As such, it appears that in many ways Bin Laden's al-Qaeda was not able to remain effective.

As a result of an ineffective al-Qaeda, Zarqawi in Iraq harnessed a new vision and new requirements for all Muslims. In 2003 responding to local contexts, al-Qaeda altered their requirements of the Muslim, changing the meaning of what it meant to be a Muslim and the individual duties of every Muslim. With the U.S presence in Iraq, Zarqawi suggested that all Muslim's should shift their duties to a local level. No longer calling for defensive jihad against the West, the distant enemy, Zarqawi called on all individual Muslims to perform the duties of establishing an Islamic state in the region, to fight the near enemy, the American troops in Iraq and the Iraqi Shi'a community.

The rise of the Islamic State in the context of the United States' withdrawal from Iraq in 2011 reflects the most interesting shift in the ideology of the individual duties of a Muslim. When the United States withdrew from Iraq in 2011, Iraq was left in political upheaval and corruption. A new wave of insurgency began as sectarian war erupted between Sunnis and Shites. The Iraqi people needed leadership and unity. Al-Qaeda in Iraq could and would provide new meaning for Iraqi's and resonated with many Sunnis who had been oppressed under Shi'a leadership for years. In conjunction, a brutal civil war in Syria provided open territory in which al-Qaeda in Iraq could operate. In Syria, al-Qaeda also resonated with the Syrian Sunni population who had lived in oppression under the dictatorship of a secular regime, led by a Shi'a minority. Responding to a need for leadership, political instability and internal fighting and available land in Syria, AQI sought to gain territory. Again, the needs of the territory and caliphate required a change in the individual obligations for each Muslim. The caliphate needed Muslims to make *hijra* to the state, to create a functioning state. The Islamic State's expansion of the individual Muslim's duties to include offensive jihad and also *hijra* reflects a response to

local context. The state needs Muslims to fight for it, to expand the state and to operate the state.

While al-Qaeda in Iraq was responding to the local context, the Syrian Civil War and discontent in Iraq, the formation of a caliphate and the immense traction and rise of the Islamic State is also, perhaps, a reflection of the disappointment and frustration with the failures of the Arab Spring. The Arab Spring protests in 2011 highlighted discontent over political leadership in the region and a desire for political inclusion. While the uprisings gave Islamist groups an opportunity to become a part of the political narrative, they were a failure and organizations like the Muslim Brotherhood in Egypt would fail to run a government and maintain political power. Interestingly, while the protests during the Arab Spring resulted in democratic elections and what seemed like progress toward more moderate processes, the Islamic State, which evolved in the years following the Arab Spring exemplifies a far more radical transition.

Regardless of the changes adopted by al-Qaeda and the Islamic State, the progression of the ideology of the duties of all Muslims reflects the significance of doctrine. While their ideologies may have shifted, al-Qaeda and the Islamic State alike have highlighted their reliance on doctrine and the importance of doctrine. Both groups have harnessed religious texts and foundational sources to justify their positions. The Islamic State has expanded the concept of the individual's duty to perform jihad beyond jihad, to include a duty to perform *hijra*. Harnessing religious scripture, they have also redefined themselves, diverging from al-Qaeda and, revitalizing the practice of slavery. The debates between Zawahiri and Zarqawi over the implementation of doctrine ultimately led to a

split between al-Qaeda in Iraq and Bin Laden's al-Qaeda. And, the use of doctrine has distinguished the Islamic State from its core al-Qaeda ideology.

While I have focused primarily on literature produced by the leadership figures within al-Qaeda and the Islamic State and have analyzed how such leaders interpret the historical sources, I would like to suggest that the changes seen within the al-Qaeda organization regarding the interpretations of historical texts and the ideology of what it means to be a Muslim go beyond the individual figures and their agendas. Cole Bunzel's, "From Paper State to Caliphate" demonstrates his particular interest in leadership and special emphasis on how each leader interprets the historical texts. While I too have used the same model, looking at leadership as a way of advancing historical development over time, I would like to suggest that there is another explanation for the changing ideologies regarding the individual duties of the Muslim that goes beyond leadership, and this explanation is the role of local context. The local context of al-Qaeda and now the Islamic State has constantly required changes within the ideology of the individual duties of a Muslim. And, while responding to their own local contexts, they have constantly been changing their perception of the West.

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