

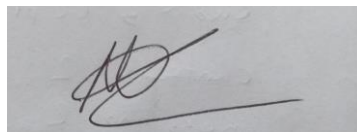
**A Tale of Two Paradigms: How Genealogical and Comparative Historical
analysis can help reset the intractable debate over the causation of
ideological violence.**

Submitted by Mark A. Bracher to the University of Exeter
as a thesis for the degree of Doctor of Philosophy in Middle East Studies
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A rectangular box containing a handwritten signature in black ink. The signature is stylized and appears to be 'M.A. Bracher'.

Abstract:

This study responds to the endemic lack of clarity and consensus afflicting academic and policy discussions on the causes of ideological violence and, by extension, the appropriate means for preventing/containing it. I trace, conceptualise, and problematise the long-standing debate between two deeply-entrenched oppositional camps or ‘paradigms’ – heuristically dubbed the ‘conservative’ and ‘progressive’ paradigms of ideological violence, respectively – that propose competing explanations for the causation of ideological violence; the former considering it a product of irrational *individual* dysfunction, the latter viewing it as a rational (if often misguided) response to *societal* dysfunction. Further, I show that extant attempts at reconciling/synthesising these paradigms have, to date, proven problematic. I explore how and why these opposing paradigms emerged and why debate between them persists. I argue that they are shaped, perpetuated and marred by multiple extra-academic dynamics and naturalised assumptions and conclude that clarity and consensus is unlikely unless we can ‘reset’ the debate, making a conscious decision to ‘step back’ from our extant paradigms/assumptions and approach the phenomenon with fresh eyes. I propose and demonstrate two methodological approaches that – used in conjunction – can contribute towards this end. Firstly, I propose that – and demonstrate how - *Genealogical Analysis* can aid in this ‘stepping back’ by denaturalising our entrenched assumptions on the causes of ideological violence (i.e., our extant paradigms) by uncovering how and why those assumptions came to be held and reified. Secondly, I propose and demonstrate *Comparative Historical Analysis*’ utility as a tool that can aid in re-approaching the phenomena with fresh eyes by helping - gradually and collaboratively - to construct a new set of more methodologically-rigorous assumptions (i.e., a new paradigm) upon which extant research built upon either extant paradigm can be resituated, reinterpreted, de-limited, and synthesised, and further research can be premised.

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Definitions of key terms:

This study makes repeated usage of several heuristic key terms/phrases to facilitate smooth and integrated discussion, comparison, and analyses. Their definitions and abbreviations (where applicable) are listed below and expanded upon and situated throughout the introduction and chapter 1. A separate, alphabetised list of abbreviations is provided on the next page:

- **Ideological violence [IV]:** the phenomenon of individuals/communities mobilising for, and participating in, political violence directed, motivated, and/or justified by an anti-status quo ideology.
- **Establishment ideology:** roughly analogous to the Marxist concept of ‘false consciousness’/‘ideology’ and Gramscian ‘hegemony’: belief systems that justify and exalt extant socio-political relations by portraying them as being just and/or natural, inevitable, rational, and immutable. Additionally/alternatively, they portray the socio-political *status quo* as constituting the best or only feasible system for ordering state and society, even if it is imperfect.
- **Ideology:** in this study, ‘ideology’ specifically refers to anti-establishment ideologies unless otherwise stated: systems of belief presenting a specific critique of the establishment ideology/socio-political *status quo* and proposing an alternative system for organising state and society (fully conceptualised and operationalised in the introduction).
- **Movement:** a faction or social movement claiming leadership of, and attempting to implement, a particular anti-establishment ideology in a particular time and place.
- **Ideological popularisation:** the process by which an ideology/movement popularises within a specific locale. Importantly, this does not necessarily involve the ideology/movement popularising among the population writ large, only that, for those members of the community engaging in IV, that ideology becomes a dominant – even *the* dominant or default - lens through which they understand their circumstances, frame their aspirations, and justify their actions. Therefore, a ‘popularised’ ideology/movement may not be popular in the broader sense but is popular among anti-establishment IV perpetrators.

- **Sunni-Lebanese-perpetrated IV:** meant in the most literal sense, implying *no* judgement or suggestion of guilt or victimhood.
- **Ideological persuasion:** shorthand for the dynamics of IV causation as understood by the ‘conservative paradigm’ of IV.
- **Post facto rationalisation:** shorthand for the dynamics of IV causation as understood by the ‘progressive paradigm’ of IV.
- **IV Imaginary:** loose, implicit, and often impulsive ideal-types - usually culturally/ideologically/politically-derived - commonly used to conceptualise, assume motivations for, and differentiate between different instances of, IV/ideologies (e.g., Islamist vs. secular, terrorist vs. revolutionary, etc.).
- **IV paradigm:** a set of ‘foundational assumptions’ on the causation of IV that serve as truistic premises upon which further research is built. These assumptions concern 1) the causation of IV; 2) the causation of ideological popularisation; and, based on these answers, 3) the best means of mitigating against occurrences of IV.
- **Iterations:** specific temporal or spatial variations on an IV paradigm, retaining its foundational assumptions as truisms but altering/specifying certain mechanisms, concepts, etc., in response to changing IV case-studies/‘imaginaries’ insufficiently explained by previous iterations based on those former case-studies/‘imaginaries’ (e.g., proposing a new iteration to understand isolated Islamist terrorists because the previous iteration – built to understand communist mass movements – does not suffice, etc.).
- **Sub-paradigms:** middle-range causal mechanisms within the bounds of a particular IV paradigm or iteration – usually delimited to specific IV case-studies/‘imaginaries’ but often co-existing without tension alongside other sub-paradigms (e.g. different causal mechanisms deemed relevant - cumulatively or variously – to Islamist terrorists; causal mechanisms deemed relevant to Islamist terrorists but not communist mass movements, etc.).

These definitions all become clearer throughout the introduction and chapter 1, where they are situated and expanded upon within the problematisation, rationale, and analytical framework.

Abbreviations:

This study makes use of many abbreviations, usually in reference to various factions and concepts. To ease comprehension, the first usage of each term in the text is presented in full with the abbreviation in square brackets.

- **AaS** (Ahrar al-Sham)
- **ADF** (Arab Deterrent Force)
- **ALF** (Arab Liberation Front)
- **ANA** (Afghan National Army)
- **ANM** (Arab National Movement [specific faction])
- **APC** (Association of Popular Committees)
- **AQ** (al-Qaeda)
- **ASAP** (Arab Socialist Action Party)
- **ASBP** (Arab Socialist Ba'ath Party)
- **ASUL** (Arab Socialist Union of Lebanon)
- **CHA** (Comparative Historical Analysis)
- **CJTF-OIR** (Combined Joint Task Force – Operation Inherent Resolve)
- **CMs** (Causal Mechanisms)
- **COIN** (Counterinsurgency)
- **CPA** (Coalition Provisional Authority [in post-invasion Iraq])
- **CPL** (Communist Party of Lebanon)
- **CPSL** (Communist Party of Syria and Lebanon)
- **CR** (Critical Realism)
- **CUP** (Committee of Union and Progress)
- **CVE** (Countering Violent Extremism)
- **DPFLP** (Democratic Popular Front for the Liberation of Palestine)
- **FPPOP** (Front of Progressive Parties, Organisations and Personalities)
- **FSA** (Free Syrian Army)
- **GC** (Global Coalition [against the self-styled Islamic State])
- **GWOT** (Global War on Terror)
- **HSC** (Horizontal Social Contract)
- **HT** (Hegemony Theory)
- **IA** (Islamic Association)

- **INM** (Independent Nasserite Movement)
- **IS** ([the self-styled] Islamic State)
- **ISAF** (International Security Assistance Force [in post-invasion Afghanistan])
- **ISIS** (Islamic State of Iraq and Syria)
- **JaN** (Jabhat al-Nusra)
- **LAF** (Lebanese Armed Forces)
- **LNM** (Lebanese National Movement)
- **LPP** (Lebanese People's Party)
- **MT** (Modernisation Theory(s))
- **NSAs** (Non-State Actors)
- **OCAL** (Organisation of Communist Action in Lebanon)
- **PFLP** (Popular Front for the Liberation of Palestine)
- **PFLP – GC** (Popular Front for the Liberation of Palestine – General Command)
- **PLO** (Palestinian Liberation Organisation)
- **PNO** (Popular Nasserite Organisation)
- **PRF** (Palestinian Rejectionist Front)
- **PRM** (Palestinian Resistance Movement)
- **PSP** (Progressive Socialist Party)
- **PsyOps** (Psychological Operations)
- **PVE** (Preventing Violent Extremism)
- **RVE** (Radicalisation into Violent Extremism)
- **R2P** (Responsibility to Protect)
- **SAA** (Syrian Arab Army)
- **SAOM** ([anti-al-Assad regime] Syrian Armed Opposition Movement)
- **SDF** (Syrian Democratic Forces)
- **SSNP** (Syrian Social Nationalist Party)
- **UAR** (United Arab Republic)
- **VSC** (Vertical Social Contract)
- **YM** (Youth of Muhammad)

Introduction:

I.

The way we understand the causes of *ideological violence* [IV] influences the way we attempt to prevent and/or contain it. While most scholars, policymakers, pundits, and practitioners today agree that IV can only be prevented/contained by addressing its 'root causes', we remain divided over just what those 'root causes' are. For some, IV is understood to be a product of societal dysfunction, in which groups of people rationally – if often misguidedly – elect violent action as the best means for overthrowing an oppressive regime/system and installing in its place a utopian alternative. It is thus considered prudent to take seriously the stated grievances of the perpetrators and attempt to promote a fairer society conducive to ameliorating the concerns of all parties. For others, in contrast, it is best understood as a product of *individual* dysfunction, in which individuals *irrationally* lash out at the world around them, either on account of violent, criminal, or intolerant personality traits or nihilistic rage that ideological narratives offer *post facto* justification for, or else on account of being duped by cynical propagandists peddling false grievances and/or totalitarian/chauvinistic worldviews and religious creeds to the gullible, insufficiently-educated, or otherwise 'vulnerable'. In this case, such stated-grievances should be dismissed as cynical *post facto* rationalisations for criminal or totalitarian intent and focus our efforts on blocking the flow of inciteful propaganda, fortifying the 'vulnerable' against manipulation, and apprehending those bent on violence.

When an accurate understanding of what causes IV can mean the difference between conflict and stability, clarity is of critical, urgent importance. Yet, at the time of writing, prospects for such appear bleak. The debate between these two schools of thought - or 'paradigms' - has been raging for over two-hundred years and appears only to be increasing in intractability and even vitriol¹. Meanwhile, attempts to reconcile, synthesise, or supplant them have so far proven inadequate. It is my contention that a 'reset' is needed: a conscious decision to step back from our respective paradigms and look at the problem with fresh eyes. In this study, I propose and demonstrate two methodological approaches that,

¹ See below.

used in conjunction, can contribute towards this end: In Part I, I show how *Genealogical Analysis* [GA] can be used to help denaturalise the entrenched foundational assumptions underpinning the two warring paradigms by uncovering the academic and extra-academic dynamics that shaped how and why those assumptions came to be held. In Part II, I demonstrate how *Comparative Historical Analysis* [CHA] can help – gradually and collaboratively – to construct a new set of more methodologically-rigorous foundational assumptions – a new paradigm – that can be used as an integrative/interpretive framework for reinterpreting, re-evaluating, resituating, delimiting, and synthesising extant studies, and as premises upon which further research can be based.

I am therefore concerned with a single, broad, open-ended primary research question: “*What can be done to improve the way we understand, study, and confront ideological violence?*”

To answer this question, I undertake three research tasks:

- 1) Develop a comprehensive understanding of the key debates taking place over the causation of IV through a critical review of extant literature and policy.
- 2) Understand how these competing schools of thought came to be and what is inhibiting efforts to achieve clarity and reach consensus.
- 3) Identify methodological tools/approaches that can contribute to resolving this issue.

In the remainder of this chapter, I conceptualise the heuristic ‘paradigm’ construct central to this research, further qualify the rationale for this study, outline my research design and dissertation structure, explicate the scope and limitations of the study, and present a statement of positionality.

II. ‘Paradigms’ of ideological violence:

The central concern of this research, then, is what I heuristically dub the two opposing ‘paradigms’ of IV (defined below). I contend that 1) our extant IV ‘paradigms’ are both in conflict and not fit for purpose and 2) attempts to resolve the long-standing debate between these extant paradigms have reached an impasse that is unlikely to be resolved absent a conscious effort to ‘reset’ the

debate and approach the phenomenon of IV with fresh eyes: i.e., by constructing a new paradigm. But what is meant by a 'paradigm' in this context, and how can we operationalise this concept for study?

In the context of this research, a 'paradigm' is a heuristic construct used to conceptualise the opposing camps dominating the ongoing debate(s) on the causation of IV. I define a 'paradigm' as a package of path-dependent 'foundational assumptions' concerning 1) the causation of IV; 2) the causation of ideological popularisation; and, based on these answers, 3) the appropriate means for mitigating against their occurrence. A paradigm is defined by its assumed answers to these questions. These assumptions are deeply naturalised and are generally treated, by paradigm adherents, uncritically as truisms upon which further research/policymaking should be premised. They thus shape and constrain research and policymaking, functioning much like the 'paradigms' described in Kuhn's seminal *The Structure of Scientific Revolutions*, which "define what should be studied, what questions should be asked, how they should be asked, and what rules should be followed in interpreting the answer obtained²". For example, if a paradigm's answer to question 1 is that IV is caused by individual dysfunction, then microscopic variables pertaining to the individual (rather than macroscopic variables pertaining to society) will be privileged for investigation. If the paradigm's answer to question 2 is that the popularisation of ideologies can be attributed to the manipulation of 'vulnerable' individuals, then research will focus on investigating the modes of manipulation, the properties of the 'vulnerable', etc.

Our extant IV paradigms differ from Kuhnian paradigms in an important way, however. According to Kuhn, paradigms that prove insufficient to explain 'anomalies' - or, in this case, new manifestations of the phenomenon under study (e.g., a shift in attention from socialist mass movements to marginal jihadist cells) - enter a 'crisis' that "[necessitate] the community's rejection of one time-honoured scientific theory in favour of another incompatible with it³". However,

² I employ here the definition suggested by Ritzer (George Ritzer, "Sociology: A Multiple Paradigm Science," *The American Sociologist* 10(3) (Aug., 1975), 157). As Ritzer notes, Kuhn (in his landmark work, Thomas S. Kuhn, *The Structure of Scientific Revolutions*, 3rd ed. (Chicago: Chicago University Press, 1996 [1962])) failed to establish a clear and consistent definition, employing the term "in at least 21 different ways" throughout his research (Ritzer, "Sociology," 156).

³ Kuhn, *The Structure of Scientific Revolutions*, 6.

knowledge claims on IV have not developed quite as Kuhn imagined. Rather than 'revolutions', we witness 'evolutions', in which paradigm crises prompt not the wholesale jettisoning of the extant paradigm and an iconoclastic, unbounded search for replacements, but rather attempts to tweak those paradigms to cater for anomalistic new information while retaining its original foundational assumptions (those assumptions having become politically/culturally entrenched). For this reason I make a distinction between 'paradigms' and 'iterations': while both function – in a concentric manner – akin to Kuhnian paradigms (in their directing/constraining role), the *paradigm* constitutes the broadly immutable and unquestioned foundational assumptions of a particular school of thought, while the *iteration* constitutes a particular temporal or spatial variation of that paradigm produced by either 1) the emergence of a particular 'imaginary' of the perpetrator subject (e.g., 'socialist revolutionary', 'Third Worldist guerrilla', 'Islamist terrorist', etc.) not sufficiently explained under the previous iteration; or 2) a specific agenda or position/perspective (e.g. *insurgent*, *counterinsurgent*, or '*observer*'⁴). In addition, I advance a third concept – the 'sub-paradigm' – which, operating at the level of 'middle-range theory' within the bounds of a particular paradigm or iteration, proposes broad causal mechanisms delimited to a particular context or 'perpetrator imaginary' (e.g., limited to motivations of religious militants; limited to ideological popularisation during revolutions, etc.). These concepts and their relation to one another will become clearer throughout the analyses of chapters 1-3.

The problem is that – like Kuhnian paradigms - should a paradigm's foundational assumptions prove erroneous, then even the most methodologically-rigorous research premised upon it is liable to produce misleading confirmation bias of flawed, strawman caricatures of the phenomenon under study. At best, it is likely to tell only half the story, with the risk of reducing the phenomenon to that half story. It is my contention that attempts to bring clarity and consensus should focus on evaluating these extant paradigms and working towards the construction of a new 'third' paradigm, the methodologically-grounded, revised foundational assumptions of which can serve as premises upon which to base further research, and an integrative framework into which extant research (and

⁴ See chapter 2.

particularly extant sub-paradigms) can be methodologically integrated, reinterpreted, resituated, delimited, etc. However, neither evaluating our extant paradigms, nor formulating a new one, is an easy task:

III. Rationale for the study:

Attempts to achieve clarity and consensus on the causation of IV are marred by the persistence of a long-standing, often vitriolic debate between two such paradigms – heuristically dubbed the ‘conservative’ and ‘progressive’ paradigms, respectively - that can trace both their origins and their mutual animosity to the immediate aftermath of the 1789 French Revolution. As their names suggest, they have their origins in - and can be broadly defined by - their opposing political/ideological functions; though it is important to stress that individual adherence to either paradigm cannot be reduced to such (see below), both offering much value alongside severe limitations:

The ‘conservative’ paradigm - originating with reactionary attempts to come to terms with the 1789 French Revolution - and today represented by the *Radicalisation into Violent Extremism* [RVE] ‘iteration’ favoured by most governments - attributes IV to microscopic factors that place culpability on the mindset of the individual perpetrator. IV is assumed to result from ideological brainwashing, ideologically-justified delinquency, intolerant bigotry, or some combination thereof. The paradigm is ‘conservative’ by function – insisting that violence occurs because something has gone wrong in the mindset of the perpetrating individual. It delegitimises dissent by branding it a pathology and exonerates society by dismissing stated grievances as cynical *post facto* rationalisations. Therefore, solutions require ‘fixing’ the individual, not society⁵.

The ‘progressive’ paradigm originally emerged as an explicit counter to these delegitimising claims, holding stated grievances to be both valid and of primary – even sole – causal importance. While the progressive paradigm has since splintered into various ‘iterations’ (*insurgent*, *counterinsurgent*, and ‘*observer*’) with differing agendas and positionality, it is united by its common foundational assumptions that IV can be attributed to macroscopic factors whereby violence occurs not because something has gone wrong in the mindset of the individual perpetrator, but rather because something has gone wrong in

⁵ See Chapter 1.

society. It is therefore 'progressive' (if often selectively) by function, legitimising dissent (at least partially) by portraying it as a rational - if often misguided - response to injustice and holding accountable – and necessitating changes to – the host society⁶.

For reasons explored in chapter 3, the past two decades have witnessed various attempts to synthesise these two paradigms – usually in the context of the *Global War on Terror* [GWOT] and 'Arab Uprisings'. Such attempts have generally attempted to incorporate the apparent insights offered by both paradigms, using those insights to fill each paradigm's blind-spots, and account for the apparent confluence of micro-, meso- and macroscopic factors seemingly observable in real-world cases of IV. However, as also explored in chapter 3, these attempts have – to date – proven inadequate, though not entirely without merit. It is the inadequacy of such attempts – combined with the intractability of the debate between the two traditional paradigms – that necessitates our quest to identify a methodological approach better suited to the task of producing a new paradigm.

The persistence both of these paradigms, the intractable conflict between them, and the thus-far inadequate attempts to synthesise their claims and insights, owes to both academic and extra-academic dynamics (explored at length across chapters 1-3). As Kuhn and his acolytes noted, the victor in a clash of paradigms is often determined at least as much by extra-academic as purely academic dynamics⁷. This is observable in the paradigm clash over the causes of IV:

From a purely academic standpoint, the continued lack of consensus can be attributed to the fact that there are many reasonable and legitimate reasons why scholars today differ in their paradigm preferences. Both paradigms appear to offer valid and intuitively-convincing insights on the causes of IV, leading adherents on both sides to invest in and defend their chosen paradigm from criticism. Simultaneously, both paradigms neglect or struggle to account for key dynamics and integrate key sets of variables, leading both sides to criticise the other with equal vigour. Additionally, there is a somewhat inevitable disciplinary division-of-labour that predisposes different fields towards favouring different

⁶ See Chapter 2.

⁷ See below.

paradigms: microscopically-oriented fields (e.g., psychology) will tend to produce theories attributing IV to microscopic dynamics (à la conservative paradigm) while macroscopically-oriented fields (e.g., sociology, area studies, etc.) will likely produce theories attributing it to macroscopic dynamics (à la progressive paradigm). Similarly, one's stance on the agency vs. structure debate may also be influential: those who place more emphasis on agency being more likely to attribute IV to microscopic explanations pertaining to the mindset of the individual perpetrator (à la conservative paradigm) while those emphasising structure will likely be drawn to macroscopic, structural explanations (à la progressive paradigm).

More consequential, however - in terms of paradigm formation and reification, the intractability of debates between them, and faltering efforts at synthesis and/or transcendence – are extra-academic dynamics.

Firstly, the rival paradigms' founding political/ideological divisions remain strong and have perhaps even deepened in recent years, becoming increasingly intertwined with partisan politics, the ongoing 'culture wars', and broader concerns over the character and health of Western liberal democracy and cultural conscience. Recent iterations of the conservative paradigm (notably RVE) are frequently denounced by left-leaning scholars as a tool for defenders of the *status quo* to delegitimise dissent and shirk culpability⁸ - echoing often verbatim charges levelled a century or more earlier by their ideological predecessors. In turn, demands by such scholars to take seriously the stated-grievances of ideological militants are often responded to with equal vitriol, including open accusations of 'terrorist sympathising'⁹ or white-washing terrorist atrocities out of ideological zeal to 'blame everything on the West'¹⁰. Similarly, a tacit embargo against

⁸ See Chapter 1.

⁹ This has extended to the behaviour of some governments. In 2021 in France, Minister of Higher Education Frederique Vidal called for an investigation into so-called 'Islamogauchisme' (Islamofascism) in an attempt to root out what he and many others – including, eventually, President Macron himself - considered an unholy alliance between Islamists and supposedly anti-civilisational leftist scholars (John L. Esposito and Farid Hafez, "How Europe turned Islamophobia into a dangerous myth," *Middle East Eye*, dated May 31, 2021, accessed June 18, 2021. Available at: <https://www.middleeasteye.net/opinion/islamophobia-europe-turned-into-dangerous-myth>). Similarly, in the UK members of the Conservative government have accused academic critics of the PREVENT programme of terrorist sympathising (see chapter 1).

¹⁰ See for example: Nikolas Kozloff, "A Tale of Boko Haram, Political Correctness, Feminism and the Left," *The Huffington Post*, dated May 31, 2014 (updated July 30, 2014), accessed October 24, 2021. Available at: https://www.huffpost.com/entry/a-tale-of-boko-haram-poli_b_5421960; Michael Walzer, "Islamism and the Left," *Dissent*, dated Winter, 2015, accessed July 5, 2021.

investigating Islam (or religiosity) as a causal factor in promoting Islamically-framed violence – instituted in large measure by left-leaning scholars appalled by the early GWOT's rampant normalisation of Islamophobia¹¹ - has recently encountered a backlash from some scholars and commentators arguing, with varying levels of sophistication and good faith, that 'political correctness' should not be allowed to stand in the way of urgently-needed research¹². On one level, this has been a deeply scholarly debate¹³, on another level a strategic one¹⁴ and, on another, a vitriolic and partisan one in which the relationship (or lack thereof)

Available at: <https://www.dissentmagazine.org/article/islamism-and-the-left>; and Elliot Kaufman, "What Ever Happened to the New Atheists?" *National Review*, dated July 28, 2017, accessed January 20, 2022. Available at: <https://www.nationalreview.com/2017/07/new-atheists-american-left-wing-schism-islam-organized-religion/>

¹¹ Simon Cottee, "What ISIS Really Wants" Revisited: Religion Matters in Jihadist Violence, but How?," *Studies in Conflict & Terrorism* 40(6) (2017): pp. 439-454; Lorne L. Dawson, "Bringing Religiosity Back In: Critical Reflection on the Explanation of Western Homegrown Religious Terrorism (Part I)," *Perspectives on Terrorism* 15(1) (Feb., 2021): pp. 2-16.

¹² On the more sophisticated, good-faith end, for example, see Daveed Gartenstein-Ross, "Blind spot," *Foundation for the Defense of Democracies*, dated November 2, 2012, accessed June 10, 2021. Available at: <https://www.fdd.org/analysis/op-eds/2012/11/02/a-blind-spot/>; Susanne Olsson, "The Radical Need of a Critical Language: On Radical Islam," *Religions* 12(225) (2021), 203; Shadi Hamid, "Does ISIS really have nothing to do with Islam? Islamic apologetics carry serious risks," *The Washington Post*, dated November 18 2015, accessed June 2, 2021. Available at: <https://www.washingtonpost.com/news/acts-of-faith/wp/2015/11/18/does-isis-really-have-nothing-to-do-with-islam-islamic-apologetics-carry-serious-risks/>; Dawson, "Bringing Religiosity Back In".

¹³ The scholarly 'backlash' against the *de facto* taboo against investigating religiosity as cause has been led primarily by Dawson, "Bringing Religiosity back in,,"; Rüdiger Lohlker, "The 'I' of ISIS: Why theology matters," *Interventionen* 7 (Aug.-Oct., 2016): pp. 4-15; Jeppe Fuglsang Larsen, "The role of religion in Islamist radicalisation processes," *Critical Studies on Terrorism* 13(3) (2020): pp. 396-417; Simon Cottee, "We need to talk about Mohammad: Criminology, theistic violence and the murder of Theo Van Gogh," *British Journal of Criminology* 54 (Jun., 2014): pp. 981-1001; Alex P. Schmid and Judith Tinnes, "Foreign (Terrorist) Fighters with IS: A European Perspective," *International Centre for Counter-Terrorism – the Hague* (Dec., 2015), <https://icct.nl/app/uploads/2015/12/ICCT-Schmid-Foreign-Terrorist-Fighters-with-IS-A-European-Perspective-December2015.pdf>; Hamid, "Does ISIS really have nothing to do with Islam?".

¹⁴ Chiefly between those who argue we cannot combat Islamist violence without identifying the cause (which they hold to be Islam itself) and those who assert that demonising Islam will only aid Islamist propaganda. In the first camp, the Trump campaign and subsequent administration has led the charge, in addition to numerous pundits, e.g. Roy Abbas, "Think ISIS is not Islamic? Think again," *HuffPost*, dated November 20, 2015 (updated November 20, 2016), accessed June 7, 2021. Available at: https://www.huffpost.com/entry/think-isis-are-not-islami_b_8608048; Steven Emerson and Pete Hoekstra, "Someone Tell The President We Can't Fight Radical Islam By Being Politically Correct," *Forbes*, dated November 16, 2015, accessed June 7, 2021. Available at: <https://www.forbes.com/sites/realspin/2015/11/16/someone-tell-the-president-we-cant-fight-radical-islam-by-being-politically-correct/?sh=23fdf5db567f>; Ayaan Hirsi Ali, "Islam is a religion of violence," *Foreign Policy*, dated November 9, 2015, accessed June 10, 2021. Available at: <https://foreignpolicy.com/2015/11/09/islam-is-a-religion-of-violence-ayaan-hirsi-ali-debate-islamic-state/>. In the latter we see the Obama administration alongside, e.g., William McCants, "Trump's misdiagnosis of the jihadist threat," *Brookings*, dated November 11, 2016, accessed June 4, 2021. Available at: <https://www.brookings.edu/blog/markaz/2016/11/11/trumps-misdiagnosis-of-the-jihadist-threat/>; John L. Esposito, "Islamophobia and Radicalization: Roots, Impact and Implications," in *Islamophobia and Radicalization: Breeding Intolerance and Violence*, eds. John L. Esposito and Derya Iner (Cham: Palgrave Macmillan, 2019), 23-28, etc.

between Islam/religiosity and violence became a political football between both political and cultural lefts and rights¹⁵. Meanwhile, opposing sides in the trend-setting US' polarised political spectrum have at times been quick to attribute their own militancy to legitimising progressive paradigm dynamics and the behaviour of their opponents to delegitimising conservative paradigm dynamics (all the while crying foul play when they find themselves on the receiving end of the same discursive sleights-of-hand). For example, many on the left of the political spectrum denounced predominantly ring-wing attempts to delegitimise the *Black Lives Matter* movement by portraying it as irrational hysteria whipped up by criminal 'outside agitators'¹⁶, but have themselves not always been above deploying conservative paradigm tropes to delegitimise militant Trump supporters as deluded imbeciles whipped into an equally irrational hysteria by their own demagogues and tricksters¹⁷. This unwitting hypocrisy should lead us less to aloof judgement than to recognition of a near-universal human frailty: the delegitimising conservative paradigm is inherently intuitive when attempting to understand causes we dislike or feel threatened by, and the legitimising progressive paradigm is inherently intuitive when attempting to explain causes we admire or sympathise with. I myself, even when conscious of this frailty, have not proven immune to it. This can render us all deeply emotionally invested in our

¹⁵ Notably in the US Trump-Clinton President campaign of 2016 and the ongoing French Macron-Le Pen Presidential campaign. See: Ed Pertwee, "Donald Trump, the anti-Muslim far right and the new conservative revolution," *Ethnic and Racial Studies* 43(16) (2020): pp. 211-230; "Editorial: Islam, Secularism, and the Culture Wars in France," *Berkeley Forum*, dated May 13, 2021, accessed June 18, 2021. Available at: <https://berkeleycenter.georgetown.edu/posts/islam-secularism-and-the-culture-wars-in-france>

¹⁶ Masha Gessen, "During nationwide protests, politicians resort to the outside agitator trope," *The New Yorker*, dated June 2, 2020. Accessed June 4, 2020. Available at: <https://www.newyorker.com/news/our-columnists/during-nationwide-protests-politicians-resort-to-the-outside-agitator-trope>; Glenn Houlihan, "Don't fall for the myth of the 'outside agitator' in racial justice protests," *Jacobin*, undated. Accessed June 4, 2020. Available at: <https://www.jacobinmag.com/2020/05/outside-agitator-racial-justice-protests-minneapolis-george-floyd/>; Li Zhou, "The trope of 'outside agitators' at protests, explained," *Vox*, dated June 3, 2020. Accessed June 4, 2020. Available at: <https://www.vox.com/2020/6/3/21275720/george-floyd-protests-outside-agitators-ferguson-civil-rights-movement>

¹⁷ Caitlin Flanagan, "Worst Revolution ever," *The Atlantic*, dated January 10, 2021. Accessed January 12, 2021. Available at: <https://www.theatlantic.com/ideas/archive/2021/01/worst-revolution-ever/617623/>; Ross Douthat, "How Trump made the fantasy real," *The New York Times*, dated January 9, 2021. Accessed January 12, 2021. Available at: <https://www.nytimes.com/2021/01/09/opinion/sunday/trump-capitol-riot-legacy.html>; Spencer Kornhaber, "The superhero fantasies of Trump's mob," *The Atlantic*, dated January 8, 2021. Accessed January 12, 2021. Available at: <https://www.theatlantic.com/culture/archive/2021/01/alternate-reality-trump-capitol-mob/617596/>; Juliette Kayyem, "How MAGA extremism ends," *The Atlantic*, dated January 12, 2021. Accessed January 12, 2021. Available at: <https://www.theatlantic.com/ideas/archive/2021/01/stop-domestic-terrorism-shut-down-its-leader/617640/>

instinctual assumptions and impressions about specific ideological movements, a further impediment to clarity and consensus. A supporter of a particular movement will be loath to entertain that its partisans might be motivated by anything other than a rational response to injustice, while an opponent of that movement will resist acknowledging that a movement they consider to be comprised of bigots, dupes, criminals, narcissists, rebels-without-a-cause, degenerates, and/or deplorables could possibly be responding rationally (even if misguidedly) to legitimate grievances. Thus, all too frequently, debates descend into stubborn closed-mindedness, opprobrium and *ad hominin* denunciations rather than reasoned debates¹⁸. This, in turn, frequently promotes further entrenchment of opinion, both in defiance against such attacks and in the exasperated pursuit of vindication against the apparent foolishness of the other side. The result is that debate is stifled, divisions continue to harden, and important variables are downplayed, ignored, or prematurely dismissed as both sides fear offering grist to the other's mill¹⁹.

Secondly, our intuitive assumptions on the causes of IV are deeply shaped at the subconscious level by cultural 'imaginaries' of specific historical episodes of IV. In the canon of folk histories, we see both romanticised narratives of heroic revolutionaries that inspire progressive paradigm understandings and demonising narratives of murderous mobs and fanatical zealots that inspire conservative paradigm explanations. Moreover, these folk histories are frequently contested along political lines. Were the French Revolution's *Sans-Culottes* a heroic assertion of the popular will against an unjust *Ancien Régime*, or an

¹⁸ This has been demonstrated tragi-comic microcosm in the falling out of long-time friends and famous scholars of Islamism – Olivier Roy and Gilles Kepel. Recounting their feud, Nossiter lists the barbs exchanged between the two: “‘Madman,’ ‘thug,’ ‘illiterate,’ ‘paranoid,’ ‘ass,’ ‘not a thinker’ [...] ‘ignoramus’” (Adam Nossiter, “‘That Ignoramus’: 2 French Scholars of Radical Islam Turn Bitter Rivals,” *The New York Times*, dated July 12, 2016, accessed June 25, 2021. Available at: <https://www.nytimes.com/2016/07/13/world/europe/france-radical-islam.html?action=click&module=RelatedCoverage&pgtype=Article®ion=Footer>).

More broadly, those on one side of the debate are often denounced as ‘leftist ideologues’ and ‘useful idiots’ while those on the other face accusations of Islamophobia. See for example: Emerson and Hoekstra, “Someone Tell The President”; Walzer, “Islamism and the Left”; Kozloff, “A Tale of Boko Haram”.

¹⁹ For example, in the early years of the GWOT, there was a *de facto* taboo against acknowledging the role of grievances in promoting IV for fear of lending justification to mass murder (see chapter 1). More recently, a *de facto* taboo of sorts has coalesced around investigating the causal role of religiosity. As Olsson admits, there is a skittishness among many scholars of acknowledging and investigating this variable for fear of inadvertently legitimising Islamophobic narratives (Susanne Olsson, “The Radical Need of a Critical Language: On Radical Islam,” *Religions* 12(225) (2021), 2-3).

irrational mob whipped into murderous hysteria by their demagogues?²⁰ Was 'Che' Guevara an idealistic revolutionary or a pitiless mass murderer? As the old saying goes, one man's terrorist is another man's freedom fighter.

Thirdly, those who attempt to walk the middle path, seeking to synthesise the best insights from both paradigms, all too often find themselves struggling to delineate just where that middle is, ever pulled between the two paradigms with their helpful frameworks and frequently-leading nomenclature. Thus, do we often see scholars attempting to shoe-horn progressive paradigm variables into broader interpretive frameworks designed around conservative paradigm foundational assumptions (most recently RVE) or, conversely, attempting to clumsily bolt on microscopic affective theories borrowed from conservative paradigm literature to otherwise macroscopic progressive paradigm-style analyses with no clear framework for integrating them²¹.

Finally, while these paradigms emerged as explicit opponents of one another and broadly remained so for as long as the IV in question was a domestic issue, overtime the lines between them became blurred. The Cold War made the acknowledgement of stated grievances politically and ideologically palatable – even expedient – when attempting to account for IV in non-domestic locales, a trend which continued into the years of the GWOT and 'Arab Spring'²². However, whenever our own societies have become the targets of such violence, delegitimising conservative paradigm attributions typically become the impulse response once again in governmental and popular discourses. These discursive tendencies have led to intense confusion in the way Islamically-framed violence has been understood over the past two decades, with analysts and practitioners struggling to reconcile conservative paradigm narratives depicting perpetrators as irrational religious fanatics and progressive paradigm narratives depicting perpetrators as rationally responding to legitimate grievances in their homelands that can be combatted through the promotion of Western liberal democracy or 'Freedom'²³. The result has been a sort of *ad hoc* 'hybrid' paradigm, attempting to throw together the most helpful insights from each paradigm without

²⁰ Taaffe has discussed the ideological battle raging between politically-opposed historians over such competing characterisations, see chapter 1, Peter Taaffe, *The masses arise: the Great French Revolution 1789-1815* (London: Socialist Publications Ltd., 2009 [1989]) [Kindle].

²¹ See chapter 3 in particular, with some examples in chapters 1 and 2.

²² See Chapters 2 and 3.

²³ See Chapter 3.

methodologically or systematically synthesising them. This has typically taken the form of a simplistic stratified perpetrator typology, in which hard and essentially arbitrary lines are drawn between a mass base of rational perpetrators motivated by progressive paradigm dynamics, and a small ‘hardcore’ of psychologically-deviant, irrational religious fanatics motivated by conservative paradigm dynamics. As I show in chapter 3, the results of such efforts have been far from adequate.

With the debate so deeply entrenched and so woefully afflicted, it seems that progress towards consensus and clarity cannot be achieved without a concerted, deliberate, and explicit resolution to ‘reset’ the debate; a wilful and conscious decision to take a step back, examine where our assumptions have come from and where they are going. The rationale for this research can thus be pithily articulated using a set of concepts expounded by Banville and Landry²⁴:

In a 1989 article, Banville and Landry – building on Kuhn’s ‘paradigm’ thesis – proposed two research tasks for those seeking to revitalise a field afflicted by a paradigm crisis. In the first instance, they argued, we should become ‘paradigm dissectors’ where, viewing paradigms “as central to the cognition process” we “analyse [extant paradigms] for [their] contribution to [knowledge claim production]” and evaluate how suitable they are for the task. Having problematised and deconstructed those extant paradigms, we should then proceed to the task of ‘paradigm hunting’, in which we might “hope to remedy a deplorable state in [our] field by providing a [new] paradigm or by promoting the search for it”²⁵.

Banville and Landry did not propose a specific methodology for these ‘paradigm dissecting’ and ‘paradigm hunting’ tasks. In this study, I attempt to do just that in the context of ‘dissecting’ our extant IV paradigms and ‘hunting’ for a new, improved paradigm that can supplant them – while also integrating and delimiting the valuable middle range theories built upon them.

IV. Research design and dissertation structure:

²⁴ Claude Banville and Maurice Landry, “Can the Field of MIS be Disciplined?” *Communications of the ACM* 32(1) (Jan., 1989): pp. 48-60.

²⁵ *Ibid*, 49.

This study is composed of two parts, in which Part I proposes and demonstrates a methodological approach to aid in ‘dissecting’ our extant IV paradigms (using *Genealogical Analysis* [GA]), and Part II proposes and demonstrates a methodological approach to aid in ‘hunting’ for a new paradigm (employing *Comparative Historical Analysis* [CHA]):

Part I: Paradigm ‘dissecting’ Genealogical Analysis:

Part I serves a dual purpose. Most immediately, it acts as a critical literature review that substantiates and expands upon the rationale for this study by explicating and problematising our extant paradigms, the debate(s) between them, and extant efforts to synthesise or transcend them. It demonstrates that our extant paradigms (and attempts at synthesis) are not fit for purpose as foundational premises upon which to base further research, being shaped and perpetuated by myriad extra-academic dynamics rather than a methodologically-rigorous process of development and refinement. Moreover, it exposes the flaws, limitations, and blind spots that hamper them, and how this impacts negatively upon otherwise commendable research premised upon their foundational assumptions.

Simultaneously, however, it demonstrates GA’s particular utility for ‘paradigm dissecting’, showing how it can aid such problematisation by denaturalising the foundational assumptions typically treated as truisms by paradigm adherents. The key contribution of this GA – vis-à-vis the other methods of evaluation employed in this critical literature review – is to ‘open up’ both paradigms (and attempted syntheses thereof) to critique by excavating the often-concealed extra-academic origins and developmental trajectories of those assumptions. By interrogating paradigms at their very ‘roots’ (their foundational assumptions), it is able to problematise the entire paradigm *in toto*, rather than through merely sniping at certain aspects or critiquing specific studies built upon it. Otherwise stated, GA gets immediately to the heart of a paradigm, unveiling any foundational faults that will compromise all research premised upon it by “illuminat[ing] the contingency of the taken for granted, denaturalis[ing] what

seems immutable, [and] destabilis[ing] seemingly natural categories as constructs...²⁶. But what is GA, and how does it work?

GA begins with the premise that “ways of thinking have contingent historical roots of which their exponents are generally unaware²⁷”. Rather than the generation of knowledge being a purely social-scientific affair, it is rather conditioned by the broader conventional wisdoms, mores, preoccupations, and concerns of the society producing them²⁸ and ideas often emerge in response to specific, contingent political contexts and historical events and developments that the society – replete with its own prejudices, agendas, and hang-ups – seeks answers and solutions for²⁹. Thus, the basic assumptions upon which we premise research on phenomenon like IV are often assumed to be ‘common sense’ but are in actual fact conventional wisdoms “we inherited, unthinkingly growing into patterns of thought cultivated by others, with little sense of why just these ways of seeing, valuing, and reasoning should have gained hold in the first place³⁰”. GA seeks to uncover these ‘concealed’ extra-academic origins of taken-for-granted assumptions by assembling historiographical narratives tracing how those assumptions came to be held.

The precise methodology of GA is typically left vague and open to preference and innovation³¹. GA is most often associated with Nietzsche and Foucault. However, my embracing of the approach was not informed by their work, rather being initially spurred idiosyncratically by a desire to extend in time and space the highly thought-provoking extant political critiques of RVE, which had critiqued the iteration on grounds that its origins were political rather than social-scientific, and served specific agendas favourable to the political establishment/*status quo*³². While my initial explorations were essentially intuitive, I quickly realised that a firm

²⁶ Ding Wang, “Foucault and the smart city,” *Paper presented at Design for Next: 12th EAD Conference, Sapienza University of Rome, 12-13 April, 2017*, 2.

²⁷ Mark Bevir, *Democratic Governance* (Princeton and Oxford: Princeton University Press, 2010), 10.

²⁸ Matthieu Queloz, *The Practical Origins of Ideas: Genealogy as Conceptual Reverse-Engineering* (Oxford: Oxford University Press, 2021), 1-2.

²⁹ Janosch Prinz & Paul Raekstad, “The value of genealogies for political philosophy,” *Inquiry* (2020), 7.

Queloz, *The Practical Origins of Ideas*³⁰, 1.

³¹ Colin Koopman, *Genealogy as Critique: Foucault and the Problems of Modernity* (Bloomington and Indianapolis: Indiana University Press, 2013), 5.

³² See below and, in detail, chapter 1.

and explicit analytical framework was required both to guide this process, justify my conclusions, and minimise as much as possible the dangers of human error and ideological intrusion inherent in any approach that seeks to impute likely motives to the founding and perpetuation of particular ideas and beliefs. Thus, I sought guidance in the philosophy and sociology of social science. I took my lead from the 'externalist' approach to historiography – as encapsulated by Merton's assertion that research is "stimulated, checked or modified by the structure, beliefs and aspirations of the society"³³ – and an emic approach to reflexivity (with respect to the material and ideological 'positionality' of the researcher³⁴). It should be stressed, however, that I approach these considerations through a critical realist rather than anti-realist ontological/epistemological lens.

Developed iteratively alongside my growing familiarity with the IV literature, this approach was lent credence by my early impressions of that literature; the latter informing my embrace of the former, the former shaping my further analysis of the latter. Specifically, my adoption of this approach followed several early observations: 1) that, as noted, critical scholarship on RVE critiqued not only its conceptual limitations but, moreover, its alleged political partiality³⁵; 2) that IV theorising has traditionally dichotomised between opposing 'conservative' and 'progressive' paradigms driven, at least in part, by opposing ideological attitudes; and 3) that these two paradigms have overtly ideological origins – emerging in conscious and explicit opposition to one another from opposing interest groups (restorationists vs. revolutionists) – in the aftermath of the 1789 *French Revolution*. From these overtly partisan roots, it appeared necessary to trace their methodological genealogy(s) forward to their ostensibly non-partisan, academic current iterations; examining all along the way the methodological (and frequently extra-methodological) inputs – and broader socio-political-historical-ideological settings - that have shaped, sustained, reproduced, and adjusted their foundational assumptions.

Building on this initiatory impulse, I further consulted the philosophy and sociology of knowledge literature to guide this historiographical/methodological

³³ Merton paraphrased in A. Rupert Hall, "Merton Revisited or Science and Society in the Seventeenth Century," *History of Science* 2(1) (1963), 1.

³⁴ Adapted from Audrey M. Kleinsasser, "Researchers, Reflexivity, and Good Data: Writing to Unlearn," *Theory into Practice* 39(3) (Summer, 2000), 155.

³⁵ See chapter 1.

analysis; these insights providing a loose analytical framework that aids in both conceptualising the evolving body(s) of knowledge, and in hypothesising potential extra-academic influences to explore. Specifically, I was drawn to Bourdieu's 'fields theory', which I fleshed out by drawing upon complementary insights:

Bourdieu's theory of intellectual 'fields' - "sites of struggle" in which agents with varying interests and levels of 'capital', influence, or 'social authority' compete to dictate "the definition of conditions and rules of knowledge production and validation³⁶" - aids our conceptualisation of the various inputs – academic and extra-academic – influencing how paradigms develop and achieve (or fail to achieve) hegemony. Field analysis involves deciphering "the ways in which previous knowledge about the object under investigation had been generated, by whom, and whose interests were served by those knowledge-generation practices³⁷". I conceive that, in IV research, the construction, reification, preproduction, and policing of paradigms, iterations and sub-paradigms - in addition to evolutions of, revolutions in, and rebellions against them – are mediated by these fields; their constituent agents struggling over and/or dialectically shaping and constraining those assumptions and evolutions through various means of ideological projection, 'side-taking' (generally in terms of being pro- or anti-socio-political *status quo*), institutional and/or cultural gate-keeping, patronage, facilitation, direction, platforming, and legitimisation/de-legitimisation; dynamics that will become clearer throughout the following analyses. The sociology of knowledge literature identifies several such key extra-academic influences, notably:

- 1) *Institutional constraints*: picturing the intellectual field as constituting various interacting sub-fields, the most immediate sub-field constraining research is the institutional one, i.e., constraints levelled

³⁶ Like Kuhn, Bourdieu "was not a lover of definitions" (Erik Neveu, "Bourdieu's Capital(s): Sociologizing an Economic Concept," in *The Oxford Handbook of Pierre Bourdieu*, eds. Thomas Medvetz and Jeffrey J. Sallaz (New York: Oxford University Press, 2018), 347). The cited definition is drawn from Claude Banville and Maurice Landry, "Can the Field of MIS be Disciplined?" *Communications of the ACM* 32(1) (Jan., 1989), 52. See also: Fran M. Collyer, et al., "Gatekeepers in the healthcare sector: Knowledge and Bourdieu's concept of field," *Social Science and Medicine* 186 (2017), 98; Fritz Ringer, "The intellectual field, intellectual history, and the sociology of knowledge," *Theory and Society* 19 (1990), 270.

³⁷ Patricia Thomson, "Field," in *Pierre Bourdieu: Key Concepts*, ed. Michael Grenfell (Durham: Acumen, 2008), 67.

by fellow academics and/or bureaucratic structures and norms within the academy. Notably, fealty to the dominant iteration's concepts, precedents, and methodological repertoires is often an important prerequisite towards obtaining funding, prestigious conference invites, job opportunities, journal space, book deals, etc., all of which depend on cultivating academic respectability vis-à-vis one's academic peers³⁸.

- 2) *Political constraints*: pertain to government funding of academic research. Not only do governments require specific types of knowledge that exclude much academic research (typically short term, visible impact solutions³⁹ that exclude the *longue durée* solutions insisted upon by many progressive paradigm scholars), but they pressure scholars to work within their favoured paradigms/iterations/sub-paradigms through two main mechanisms: 1) evaluative processes (such as the 'impact' agenda currently afflicting UK universities⁴⁰) that pressure scholars to make their research useful to policymakers (hence adopting their iterations and research aims) as a means of procuring funding, promotion, and improving their personal job security; and 2) through specific funding applications, many of which pre-ordain the iteration and methodology to be employed and the research questions (and often even variables) to be explored⁴¹. A

³⁸ This is thoroughly discussed in: Christina Boswell & Katherine Smith, "Rethinking policy 'impact': four models of research-policy relations," *Palgrave Communications* 3(44) (2017): pp. 1-10; Claude Banville and Maurice Landry, "Can the Field of MIS be Disciplined?" *Communications of the ACM* 32(1) (Jan., 1989): pp. 48-60; D. Harrison McKnight, "Good science, bad science: Preventing paradigm paralysis and method-bias malaise," *International Journal of Accounting Information Systems* 12 (2011): pp. 84-89; Edward W. Said, "Professionals and Amateurs," in *Representations of the Intellectual: the 1993 Reith Lectures* (New York: Vintage Books, 1996 [1994]); Ritzer, "Sociology,," Ted Hutchin, *The Right Choice: Using theory of constraints for effective leadership* (Boca Raton: CRC Press, 2012), 124; Katherine Smith, "Research, policy and funding – academic treadmills and the squeeze on intellectual spaces," *The British Journal of Sociology* 61 (1) (2010): pp. 176-195; Vicente Navarro, "The politics of health inequalities research in the United States," *International Journal of Health Services* 34(1) (2004): pp. 87-99.

³⁹ Raphael S. Ezekiel & Jerrold M. Post, "Worlds in collision, worlds in collusion: The uneasy relationship between the policy community and the academic community," *Terrorism and Political Violence* 3(1) (1991), 117-121.

⁴⁰ Christina Boswell & Katherine Smith, "Rethinking policy 'impact': four models of research-policy relations," *Palgrave Communications* 3(44) (2017): pp. 1-10; Katherine E. Smith & Ellen Stewart, "We Need to Talk about Impact: Why Social Policy Academics need to Engage with the UK's Research Impact Agenda," *Journal of Social Policy* 46(1) (2017): pp. 109-127; Katherine Smith, "Research, policy and funding – academic treadmills and the squeeze on intellectual spaces," *The British Journal of Sociology* 61 (1) (2010): pp. 176-195.

⁴¹ Carol H. Weiss, "Where Politics and Evaluation Research meet," *Evaluation Practice* 14(1) (1993): pp. 93-106; Edward W. Said, "Professionals and Amateurs," in *Representations of the Intellectual: the 1993 Reith Lectures* (New York: Vintage Books, 1996 [1994]), 82; Henry A. Giroux, *University in Chains: Confronting the Military-Industrial-Academic Complex* (Oxon:

second political consideration stems from the material and ideological positionality of the individual researcher. Because IV research is so inherently ideological (by dint of its claims on *status quo* and/or dissenter legitimacy), no scholar approaches with complete disinterest. This was overt throughout the first century of IV research, which was generally conducted by stalwart conservatives on one hand (conservative paradigm) and determined revolutionists (progressive paradigm) on the other. Even today, however, we cannot approach topics such as 'Islamic extremism', 'terrorism', right/left-wing vigilantisms etc. without being influenced by our own ideological baggage, moral indignation, and preconceptions.

In addition, and based on our own study of extant IV literature, we can identify several further in-field dynamics product of the highly pragmatic and partisan/ideological aspects of IV research:

- 3) *Policymaker-driven research*: Much IV research is not only policy-driven but *policymaker* driven, with many key concepts now employed – often uncritically – by scholars deriving from policymakers rather than from socio-scientific exploration⁴². While policymakers often consult scholars for such knowledge production, scholars are rarely consulted alone. Also consulted are practitioners, politicians, journalists, clients and stakeholders, interest groups, advisors, friends, etc.⁴³ while also falling back upon their own preconceptions and intuitions⁴⁴. Moreover, when consulted, academics are often employed not to fill a research gap unconstrained, but rather to build upon frameworks or flesh out

Routledge, 2016 [2007]), 15; Herbert C. Kelman, "The Use of University Resources in Foreign Policy Research," *International Studies Quarterly* 12(1) (Mar., 1968), 19-21; Michael Useem, "Government Influence on the Social Science Paradigm," *The Sociological Quarterly* 17(2) (Spring, 1976): pp. 146-161; Robert K. Merton, *The Sociology of Science: Theoretical and Empirical Investigations* (Chicago and London: University of Chicago Press, 1973), 75.

⁴² See chapter 1.

⁴³ Carol H. Weiss, "The Many Meanings of Research Utilization," *Public Administration Review* 39(5) (Sep. - Oct., 1979), 428.

⁴⁴ Ibid, 429; Boswell & Katherine Smith, "Rethinking policy 'impact'," 5; Kelman, "The Use of University Resources," 18; Yaacov Y. I. Vertzberger, "Foreign policy decisionmakers as Practical-Intuitive Historians: Applied History and its shortcomings," *International Studies Quarterly* 30(2) (Jun., 1986): pp. 223-247.

policies already conceived by the policymaker, who may filter or reject conflicting, non-integratable, or non-actionable information⁴⁵.

- 4) *Practitioner-driven research*: most apparent in the hybrid paradigm, non-scholarly practitioners (e.g., military personnel) are often pushed to create a coherent picture from conflicting discourses over – and observed manifestations of – the phenomenon. Heuristic terms and concepts emergent from such attempts often permeate into academic usage without adequate reflexivity or operationalisation⁴⁶.
- 5) *Entrenched hegemonic assumptions*: due to the high level of cultural reification of certain themes, tropes and narratives, IV researchers do not operate absent preconceived notions imbibed from political and media discourses, literature, conventional wisdom, etc.; e.g., deeply ingrained notions and imaginaries of ‘extremists’ or religious violence, culturally-normalised ‘folk’-narratives of key historical events and epochs, etc.
- 6) *Anti-hegemonic research*: in contrast to research striving to legitimise the *status quo* and/or delegitimise its challengers, some research is driven by an opposing agenda based on delegitimising the *status quo* and/or legitimising dissent. Less overtly partisan, other research is shaped by a self-conscious awareness that hegemonic iterations serve partisan, pro-*status quo* agendas, and so actively focus on challenging them (e.g., *Critical Terrorism Studies*⁴⁷ or, more broadly, the imperative to “speak truth to power”⁴⁸).

⁴⁵ Weiss, “The Many Meanings,”; Boswell & Katherine Smith, “Rethinking policy ‘impact’,”; Irving Louis Horowitz, “Social Science Mandarins: Policymaking as a Political Formula,” *Policy Sciences* 1 (1970), 339-340.

⁴⁶ See Chapter 3.

⁴⁷ As institutionalised in the influential journal *Critical Studies in Terrorism*, est. 2008 with an explicit mandate to “challenge received wisdom [...] [through] an acute sensitivity to the politics of labelling [...] exhibit[ing] a deep awareness of key epistemological issues, including the way in which knowledge is produced as a social process, the subjectivity of the researcher, and the link between knowledge and power, and consequently, the ways in which knowledge can be employed as “a political technology” in the maintenance of hegemony by elites, institutions, and groups. [...] an anti-hegemonic project, a kind of “outsider theorising” which seeks to go beyond problem-solving within the status quo and instead... to help engage through critical theory with the problem of the status quo [...] uncovering the field’s underlying ideological, institutional, and material interests.” See: Richard Jackson, “Critical Terrorism Studies: An Explanation, a Defence and a Way Forward,” *Paper prepared for the BISA Annual Conference*, 14-16 December, 2009, University of Leicester, UK.

⁴⁸ As advocated in Said’s highly-influential 1993 lecture of that name. See: Edward W. Said, “Speaking Truth to Power,” in *Representations of the Intellectual: the 1993 Reith Lectures* (New York: Vintage Books, 1996 [1994]).

7) *Cultural pre-occupations*: particularly with the dominant conservative paradigm, knowledge production on IV is an intensely social process that is often influenced by prevailing cultural ontologies and pre-occupations at each time, with IV often understood as symptomatic of individual or cultural malfunction within the generally functioning system. Prevailing anxieties on such disruptions thus often shape how the IV threat is understood.

As Ritzer surmises then, one paradigm (or paradigm/iteration/sub-paradigm) “wins out over another because its supporters have more power than those who support competing paradigms and not necessarily because their paradigm is ‘better’ than its competitors⁴⁹”.

Finally, this analytical process was highly comparative, drawing contrasts between jostling paradigms, iterations, sub-paradigms, and their methodological and ideological genealogies to identify, distinguish and explicate the various competing concepts, claims, and narratives, and compare and evaluate their relative merits accordingly.

The findings from GA are presented as critical historiographical narratives that trace the development of particular ideas/schools of thought from their origins to the present.

Due to the potential for human error/ideological intrusion, I contend that GA will reap its best rewards through a dialectical process of refinement in which multiple scholars subject the same body of literature to scrutiny, each time being as explicit as possible about the analytical framework – formal or informal – informing them.

Part I is structured as follows:

- *Chapter 1: The conservative paradigm of ideological violence*: explicates and critiques the conservative paradigm while exhibiting the utility of GA in paradigm ‘dissection’.
- *Chapter 2: The progressive paradigm of ideological violence*: subjects the progressive paradigm to the same treatment.

⁴⁹ Ritzer, “Sociology,” 157.

- *Chapter 3: The Global War on Terror and attempts at paradigm synthesis:* explores how the GWOT and ‘Arab Uprisings’ prompted attempts to synthesise the two paradigms, explores why those attempts unfolded in the way that they did, and problematises the resulting proposals.

Part II: Paradigm ‘hunting’ Comparative Historical Analysis:

The research design for Part II is fully articulated in chapter 4. It is given its own chapter because the usage of CHA is justified based on the conclusions and lessons drawn from our problematisation of extant paradigms and attempts at synthesis in Part I. At this stage, it is sufficient to note the following:

I present and demonstrate the utility of CHA in paradigm hunting by using it to answer three questions – correlating to the aforementioned three foundational assumptions constitutive of IV paradigms – in the context of three episodes of IV perpetrated by Sunni-Lebanese militants: 1) the 1958 *Lebanese Crisis*; 2) the 1975-6 *Two-Year War*, and 3) the 2012-2014 *Sunni Insurrections*. Specifically, I ask of these three episodes three questions:

- 1) What role did the justificatory ideology/ideological movement play in the causation of the violence? (*à la* foundational assumption 1).
- 2) How did the justificatory ideology/movement come to popularise among Sunni-Lebanese militants at that time? (*à la* foundational assumption 2).
- 3) How did the justificatory ideology/movement subsequently come to lose the support of Sunni-Lebanese militants? (*à la* foundational assumption 3).

While I qualify this choice of case-studies below, my usage of these Sunni-Lebanese cases is essentially illustrative, its purpose being to signpost towards a more expansive methodological roadmap in which various researchers can - gradually, collaboratively, and dialectically – develop and refine a new set of methodologically-sound foundational assumptions (i.e. a new paradigm) to better guide further research and strategic thinking on the phenomenon, and help evaluate, synthesise, resituate, and re-interpret extant studies and data. Such a journey will entail applying this same research design (expanded upon in chapter 4) to multiple case-studies, with my own Lebanese cases being merely the first of many. This collaborative effort will 1) help build up a clearer and more nuanced

picture by gradually increasing the sample size (of historical cases) and 2) help obviate the potential for human error and/or ideological intrusion, as with the GA.

Part II is structured as follows:

- *Chapter 4: Towards a new paradigm: proposal for a comparative historical approach:* presents the case for using CHA in ‘paradigm hunting’ and outlines the specific research design for my own demonstration thereof over the following three chapters.
- *Chapter 5: The Lebanese ideological violence ‘arena’ – an overview:* provides a targeted contextual overview of the demonstrative Sunni-Lebanese case-study.
- *Chapter 6: On the causation of Sunni-perpetrated ideological violence in Lebanon:* answers CHA research question 1.
- *Chapter 7: On the rise and fall of ideological movements in Sunni Lebanon:* answers CHA research questions 1 and 2.

The study concludes by recapitulating my rationale, scope, and limitations, consolidating my direct and supplementary findings, laying out a roadmap for further research, and offering provisional insights for preventing/containing IV.

CHA case-selection:

When studying IV, no case-study is definitive. IV is a complex phenomenon with substantial variation and contingency in both causation and manifestation. Resultantly, the proposed CHA approach will need to be applied to multiple case-studies to construct, abstract, substantiate, refine, and delimit the revised foundational assumptions constitutive of a new paradigm. My usage of three episodes of Sunni-perpetrated IV in Lebanon is purely demonstrative. However, these episodes were not selected at random. Before I elaborate upon this choice of case-selection, it is helpful to summarise the setting and episodes under study:

The three episodes of Sunni-Lebanese-perpetrated IV were casually similar -both in the ‘permissive conditions’ and ‘precipitant’ developments and provocations⁵⁰

⁵⁰ ‘Permissive conditions’ constitute long-term grievances that make a community or individual amendable to revolt, while ‘precipitant factors’ constitute incidents or developments which trigger or provoke the aggrieved into embarking on that revolt. See: Martha Crenshaw, “The causes of

that produced them - yet saw belligerents mobilise under radically different ideologies (see Chapters 6, 7). The 1958 *Lebanese Crisis* saw Lebanese Sunnis resisting the political marginalisation of their confessional community - vis-à-vis the dominant Maronite community - through the lens of Pan-Arab Nationalism; hopeful that the socioeconomic and socio-political inequalities and indignities under which they chafed would be remedied by integrating Lebanon into the Pan-Arab political entity proposed by Egyptian President Nasser. The 1975-6 *Two-Year War* was, largely, a case of unfinished business, railing against unresolved grievances from 1958. Despite this, most Sunni belligerents mobilised under Marxist-leaning ideologies advancing radically different understandings of the problem and remedial proposals. Finally, in the 2012-2014 *Sunni Insurrections* – while lacking direct continuity with the two earlier struggles and confronting a new enemy (Lebanon’s newly-ascendant Shi‘a community) – they nevertheless remained animated by the marginalisation of their confessional community vis-à-vis their confessional rivals. This time, however, Sunni militants mobilised under a militant, sectarian Salafi Islamist ideology; one which had, for generations, failed to generate significant, sustained support in the community⁵¹.

As well as comparatively exploring what caused each episode (to understand what causal role the justificatory ideology played in the violence), I also investigate how each ideology came to become the dominant ideology among Sunni-Lebanese militants at that time, tracing each ideology’s ‘life-cycle’ from conception to demise. This latter exploration includes an investigation into how each justificatory ideology outcompeted rival anti-*status quo* ideologies at its time of dominance.

These cases were an intuitive choice because it was my prior research on them that first prompted me to question conventional wisdoms on the causation of IV,

terrorism,” *Comparative Politics* 13(4) (Jul., 1981): pp. 379-399; Darcy M.E. Noricks “The root-causes of Terrorism,” in *Social Science for Counterterrorism: Putting the Pieces Together*, eds. Paul K. Davis and Kim Cragin (Santa Monica, CA: RAND Corporation, 2009), 13-14; Tinka Veldhuis & Jørgen Staun, *Islamist Radicalisation: A Root Cause Model* (Clingendael: Netherlands Institute of International Relations, 2009), 26; Edward Newman, “Exploring the ‘Root Causes’ of Terrorism,” *Studies in Conflict & Terrorism* 29(8) (2006): pp. 749-772.

⁵¹ So much so that many scholars came to conclude that Lebanon’s Sunnis were somehow culturally ‘immune’ to the ‘religious extremism’ afflicting many of their co-religionists in other countries. See for example: Mackey, Sandra. *Mirror of the Arab World: Lebanon in Conflict* (New York: W.W. Norton & Company, Inc., 2008), 226; Hirst, David. *Beware of small states: Lebanon, battleground of the Middle East* (London: Faber and Faber, 2010), 3; Bilal Y. Saab, “The Failure of Salafi-Jihadi Insurgent Movements in the Levant,” *CTC Sentinel* 2(9) (Sep., 2009), 15.

particularly the dominant RVE paradigm which, at the time, I subscribed to, and most governments, practitioners, and scholars continue to subscribe to:

Firstly, the conservative paradigm's contention that IV results from the manipulation of otherwise content individuals (see Chapter 1) seemed far removed from Lebanon's episodes of IV so intimately and visibly linked with prior macroscopic grievances and developments. Moreover, during each episode, rival ideologies/movements competed to lead the movement, strongly suggesting a *post facto* role for ideologies as providing leadership and rationales for those already intent on revolt. Nor did the conservative paradigm's conceptualisation of the psychologically-maladjusted, marginal extremist appear an accurate reflection of IV in the country, which frequently mobilised large sections of the community – either as active belligerents or tacit supporters. Equally challenging was the often-nuanced ideological adherence of the perpetrators, with many 'rank-and-file' movement members (and even some mid-level leaders) frequently being conceptualised by case-study experts less as ideological 'extremists' than as 'primitive rebels', 'social bandits', and/or ambivalent 'hedgers' engaging in continuous rational evaluations as to whether their material interests lay best with their mainstream leaders or the anti-*status quo* movement. Such individuals, it is frequently contended, possess only vague understandings of the ideologies they espoused, adopting that ideology as a simplified unifying identity for distinguishing friend from foe, a culturally-resonant collectivising narrative for weaving together multiple localised injustices and abuses, and a justificatory rationale for the localised acts of dissent and resistance they provoked⁵². Moreover, their hedging between the pro-establishment ideology espoused by their mainstream communal leaders and those anti-establishment ideologies was pronounced.

Initially, this appeared to vindicate the progressive paradigm, with ideologies providing *post facto* rationales for those already intent on revolt (see chapter 2). However, while progressive paradigm-style analyses seemed to

⁵² This conceptualisation is most explicit in: Michael Johnson, *Class and Client in Beirut: The Sunni Muslim Community and the Lebanese State 1840-1985* (London & Atlantic Highlands: Ithaca Press, 1986), 83 & 200; Samir Khalaf, *Civil and Uncivil Violence in Lebanon: A History of the Internationalization of Communal Conflict* (New York: Columbia University Press, 2002), 136; and Raphaël Lefèvre, "The Sociopolitical Undercurrent of Lebanon's Salafi Militancy," *Carnegie Endowment for International Peace*, dated March 27 2018. Accessed March 30 2018. Available at: <https://carnegie-mec.org/2018/03/27/sociopolitical-undercurrent-of-lebanon-s-salafi-militancy-pub-75744>

present more plausible explanations as to why IV was occurring in Lebanon (e.g., attributing the Sunni insurrections to Hezbollah predations, lack of trust in the *Lebanese Armed Forces* [LAF], vertical and horizontal inequalities, mainstream leadership crises⁵³, etc.), they offered little explanation as to why specific ideologies became dominant at different times for expressing that discontent. What made Pan-Arab Nationalism more appealing to Lebanese Sunnis than Marxism in 1958, given the prominent place of socioeconomic inequalities in the grievances of the belligerents? What had made Pan-Arab Nationalism more appealing than Islamism, during that same period, for a movement chafing under Christian and allegedly anti-Muslim and pro-imperialist rule? What had changed to make these two previously-marginal ideologies dominant during later episodes of causally-similar IV? I could find no other case-study that demonstrated so clearly a community cycling through various ideologies in the pursuit of an essentially continuous set of objectives (i.e., levelling or overturning the confessional power balance), nor of the scantily-researched yet oft-observed competition between rival ideologies/movements seeking to assume leadership of the same cause. For example, while Iraq has also cycled through Marxist, Pan-Arab Nationalist, and Islamist ideologies over approximately the same period, the conditions and historical-causal trajectories prompting each popularisation lack the continuity experienced in Lebanon (the conditions and historical-causal trajectories under which Marxism burgeoned during 1940s-50s Iraq, for instance, shared little with those accompanying the growth of Iraq's Sunni Islamist

⁵³ Notable examples in this vein include: Raphaël Lefèvre, *The roots of crisis in northern Lebanon* (Washington, DC: Carnegie Endowment for International Peace, 2014). Available at: https://carnegieendowment.org/files/crisis_northern_lebanon.pdf; L7 CVE Lab, "Drivers of Instability, Conflict and Radicalization: A snapshot from Akkar," *Levant 7 Elevating Insight* (Jan., 2015); International Crisis Group, "Lebanon's Politics: The Sunni Community and Hariri's Future Current," *ICG Middle East Report* 96, (May 2010). Available at: <https://www.crisisgroup.org/middle-east-north-africa/eastern-mediterranean/lebanon/lebanon-s-politics-sunni-community-and-hariri-s-future-current>; Patricio Asfura-Heim, et al., *The Specter of Sunni Military Mobilization in Lebanon* (Arlington Country, Virginia: CNA Strategic Studies, 2013); Hilal Khashan, "Dateline: Why Lebanon's Sunnis support ISIS," *Middle East Quarterly*, dated Summer 2015. Accessed October 9 2016. Available at: <https://www.meforum.org/5316/lebanon-sunnis-isis>; Are John Knudsen, "Sunnism, Salafism, Sheikism: Urban Pathways of Resistance in Sidon, Lebanon," *Norwegian Institute of International Affairs* (2019). Available at: https://nupi.brage.unit.no/nupi-xmlui/bitstream/handle/11250/2599516/HYRES_Research_Note_Knudsen.pdf?sequence=1; Aram Nerguizian, "Lebanon at the Crossroads," *Statement before the U.S. Senate Foreign Relations Subcommittee on Near Eastern and South and Central Asian Affairs*, Center for Strategic & International Studies (CSIS), February 2014. Available at: <https://www.foreign.senate.gov/download/aram-nerguizian-revised-testimony>; Faysal Itani and Sarah Grebowski, "Beyond Spillover: Syria's role in Lebanon's drift toward political violence," *Atlantic Council* (2013).

insurgency following the 2003 US invasion, etc.). Similarly, while Syria demonstrates an ideological competition (between secularists and Islamists over the 2011 uprising), it lacks the temporal comparisons afforded by Lebanon, with its repeated, causally-similar conflicts manifesting under radically different ideologies/movements (like Iraq, Syria's Islamist uprising of the 1970s-80s differed markedly in causation to that of 2011). Thus, while a later research agenda might include fruitful application of the research design to compare, for example, the rise of Islamism in Syria vs. Iraq, they lack Lebanon's temporal internal comparisons which so optimise our Lebanese cases as a starting point⁵⁴. The novel cyclical nature of these Sunni-Lebanese episodes – substantiated throughout chapters 6 and 7 – render it a near unsurpassable opening case, offering within-case temporal comparisons unavailable to other studies.

The above-noted lacunae prompted me to explore more critically extant understandings of IV and, from such exploration, I grew increasingly aware of the limitations, confusions, and inconsistencies afflicting the field, and of the need to methodologically revise the foundational assumptions upon which it stands. It stood to reason that, if the Sunni-Lebanese case could highlight such issues, could it not also help remedy them? It remained necessary, however, to substantiate this intuitive choice following the case-selection guidance enshrined in methodological literature on comparative research. Here, Lebanon and its three historical episodes satisfied two key recommendations in ways for which I struggled to find rivals:

- 1) Satisfying the 'most-similar-systems' design favoured by many comparativists; explicitly Przeworski and Teune⁵⁵ and Kaarbo and Beasley⁵⁶. As I have begun to elucidate, by situating these three episodes within the same population (roughly three generations of the Sunni-Lebanese community), I optimise the selection of "systems [i.e., cases] as similar as possible with respect to as many features as possible [...] [e.g.] economic, cultural, and political characteristics [etc.] [...] [so that] the number of 'experimental' variables, although unknown and still large, is

⁵⁴ As I expand below.

⁵⁵ Adam Przeworski and Henry Teune, *The Logic of Comparative Social Inquiry* (New York: Wiley-Interscience, 1970), 32-33.

⁵⁶ Juliet Kaarbo and Ryan K. Beasley, "A Practical Guide to the Comparative Case Study Method in Political Psychology," *Political Psychology* 20(2) (Jun., 1999), 380.

minimized⁵⁷.” By situating these episodes within the *same* system, I need account only for temporal – not spatial - variations between cases⁵⁸ (as would be the case were I to compare, for example, Iraqi with Syrian Islamism, as noted above). Given CHA’s focus on historical trajectories, these temporal variations are methodologically accounted for, being the main point of analysis. As noted, the repetitive – even cyclical – outbreaks of Sunni-Lebanese-perpetrated IV provide an unrivalled case of internal, temporal comparison.

2) Tilly’s helpful heuristic of the “historical episode”: “bounded sequences of continuous interaction, usually produced by an investigator chopping up longer streams of contention into segments for purposes of systematic observation, comparison, and explanation”⁵⁹. Each of the episodes were easy to systematically bound and subdivide into sequential stages (see Chapter 6). Similarly, the ideological ‘life-cycles’ studied and conceptualised in Chapter 7 are naturally bounded by definition – from conception to demise. This bounding and segmentation aids both in typologising the episodes to check for their comparative validity, and in systematically identifying and comparing each stage in their respective historical trajectories.

Finally, on pragmatic grounds, Lebanon endears the researcher on account of the expanse and richness of extant literature available, relative to other potential case-studies (e.g., Iraq, Syria, Libya, etc., in the context of our Islamist case-study). Researchers have long been drawn to Lebanon for numerous reasons. Hourani perhaps most clearly articulated its socio-scientific value, noting that, on account of its novel, volatile socio-political dynamics and tumultuous history, “Lebanon can be of interest to the historian or political scientist because he can see there with peculiar clarity the development of a political society: that is to say, a system of customs and agreements defining the ways in which power should

⁵⁷Przeworski and Teune, *The Logic of Comparative Social Inquiry*, 32.

⁵⁸ As noted by Snyder when making the case for ‘within-nation comparison’: “Subnational units within a single country can often be more easily matched on cultural, historical, ecological, and socioeconomic dimensions than can national units [...] I am able to control for ecological, cultural, and socioeconomic conditions to a far greater extent than is usually possible in studies that compare national units” (Richard Snyder, “Scaling Down: The Subnational Comparative Method,” *Studies in Comparative International Development* 36(1) (Spring 2001), 96).

⁵⁹ Charles Tilly, *Contentious Performances* (New York: Cambridge University Press, 2008), 10.

be exercised and neighbours deal with one another⁶⁰". On top of this, Lebanon has enchanted observers through its romanticised aura as an apparent oasis of exceptionalism – long perceived as a cultural gateway between East and West, and a paragon of religious coexistence and harmony⁶¹. This made for a gripping tragic narrative when civil war arrived in the country in the 1970s, and the world watched as the cosmopolitan 'Paris of the Middle East' spiralled into a *dance macabre* of communal slaughter (how else did it first attract this young, naïve, *Middle East Studies* student?). Finally, even in its travails, Lebanon has remained a peculiarly hospitable and open environment for journalists and researchers – both culturally and politically. Add to this the fact that, for all its perceived exceptionalism, Lebanon has simultaneously been frequently considered – with some validity – as a microcosm of the broader Middle East⁶², and it becomes little surprise that the country has become the locale of choice for those seeking to examine the broader Middle East's dynamics, absent dealing with the broader Middle East's dictators, secret police, and other restrictions, and/or, (real or perceived) less hospitable and/or open/forthcoming populations (particularly in times of conflict or repression)⁶³. The result is that we possess a wealth of

⁶⁰ Albert Hourani, *The Emergence of the Modern Middle East* (Berkeley and Los Angeles: University of California Press, 1981), 124.

⁶¹ This aura – and its deep roots – is discussed particularly lucidly in Philip Mansel, *Levant: Splendour and catastrophe on the Mediterranean* (London: John Murray (Publishers), 2010), particularly page 91.

⁶² Mackey writes "Ironically, it is Lebanon, the most uncommon of Arab states, that provides a clear study of the Arab world [...] Lebanon shares many of the characteristics found in all Arab societies." (Mackey, *Mirror of the Arab World*, 4). Similarly, did write Paul Thomas Chamberlin: "Lebanon became a microcosm for so many of the changes that would take place in the region [...] religious nationalism, heavily armed private militias, sectarian strife, massacres of civilians, and urban guerrilla warfare would all touch the small Mediterranean nation." (Paul Thomas Chamberlin, "The Cold War in the Middle East," in *The Routledge Handbook of the Cold War*, eds. Artemy M. Kalinovsky and Craig Daigle (Oxon: Routledge, 2014), 172). This common trope is even more pronounced in the world of journalism and popular culture. Acclaimed BBC correspondent Jeremy Bowen once described Lebanon as "the Middle East in miniature, a microcosm of a troubled part of the world with all its surprises, strengths and weaknesses." (Jeremy Bowen, "Lebanon's vines on the frontline," *BBC News*, dated January 12 2011. Accessed August 28 2019. Available at: <https://www.bbc.co.uk/news/world-middle-east-12153124>); Lebanon's own *Naharnet* newspaper called Lebanon a "microcosm of regional conflicts," (Naharnet Newsdesk, "Lebanon 'Microcosm of regional conflicts'," *Naharnet*, undated. Accessed August 28 2019. Available at: <http://m.naharnet.com/stories/en/111756-analysts-lebanon-microcosm-of-regional-conflicts>); and, in a speech of October 1983, during the USMC's military intervention in Lebanon's civil war, US President Ronald Reagan told the American citizenry that "The factions and bitterness that we see in Lebanon are just a microcosm of the difficulties that are spread across much of that region." ("Transcript of address by President on Lebanon and Granada," *The New York Times*, dated October 28 1983. Accessed August 28 2019. Available at: <https://www.nytimes.com/1983/10/28/us/transcript-of-address-by-president-on-lebanon-and-grenada.html>).

⁶³ Certainly, it is difficult to imagine Robert Fisk fraternising so freely with civilians, fighters, warlords, and officials on the recent battlefields of Iraq, Syria, and Libya, etc., as he did throughout

literature on Lebanon and its history, far exceeding that available on potentially comparable case-studies such as Syria, Iraq, Libya, etc.

Conceptualising and operationalising 'ideology':

Finally, it is important to conceptualise and operationalise the key concept under study: 'ideology' (or, more specifically, anti-*status quo* political ideologies - hereafter 'ideology', unless otherwise specified). Ideology is a notoriously contested and difficult-to-define concept. Van Dijk laments that "of all essentially contested and controversial concepts in the social sciences and the humanities, that of 'ideology' may well come out near the top of the list⁶⁴". Moreover, as Benford and Snow lament, scholars have tended to conceptualise 'ideology' descriptively rather than analytically, the result being that it becomes difficult and unclear as to how the concept should/can be operationalised for methodological exploration⁶⁵. In hope of providing a conceptualisation of ideology that is both comprehensive and operationalisable, I employ an anatomical model influenced by Wilson⁶⁶, Benford and Snow⁶⁷, and Gamson⁶⁸ - all of whom proposed deconstructing ideologies into their constituent components. I have affirmed, refined, and expanded upon their own models in an iterative manner throughout the research process, based on continuous reflexion of the historical cases under study. Thus, my own model is, at least in part, a product of the research process, rather than one of preconceived notions liable to have led my analysis in a particular direction (and thus rendering my analyses no more reliable than the studies I critique for being built on unqualified foundational premises):

I separate ideologies into six components:

Lebanon's civil war (famously documented in Robert Fisk, *Pity the Nation: Lebanon at War* (London: Andre Deutsch, 1990)).

⁶⁴ Tuen A. Van Dijk, *Ideology: a multidisciplinary approach* (London: SAGE Publications Ltd., 2000 [1998]), 1.

⁶⁵ David A. Snow and Robert D. Benford, "Ideology, frame resonance, and participant mobilization," *International Social Movement Research* 1 (1988), 197.

⁶⁶ John Wilson, *Introduction to Social Movements* (New York: Basic Books, Inc., Publishers, 1973), 95.

⁶⁷ David A. Snow and Robert D. Benford, "Ideology,"; and Robert D. Benford and David A. Snow, "Framing Processes and Social Movements: An Overview and Assessment," *Annual Review of Sociology* 26 (2000): pp. 611-639.

⁶⁸ William A. Gamson, *Talking Politics* (Cambridge: Cambridge University Press, 1992). Summarised in John A. Noakes and Hank Johnston, "Frames of Protest: A road map to a perspective," in *Frames of Protest: Social Movements and the Framing Perspective*, eds. Hank Johnston and John A. Noakes (Lanham: Rowman & Littlefield Publishers Inc., 2005), 5.

- 1) *Prompting Grievances*: the real/perceived grievances that prompt an individual/group to formulate the ideology in the first place, e.g., wealth disparities, foreign domination, societal degradation, etc.
- 2) *Diagnostic Frames*: are evaluations of the social-political *status quo* that propose explanations for the suffering of the populations the ideology's entrepreneurs wish to mobilise. They seek to subvert the dominant establishment ideology by informing those populations that their suffering results from deliberate and avoidable injustices afflicted upon them by a self-serving outgroup, rather than being natural, just, immutable and/or for the benefit of all. They identify oppressive/exploitative actors and articulate how and why those oppressors exercise and sustain that oppression/exploitation. They may also seek to counter the claims of rival ideologies, demonstrating how that rival fails to accurately diagnose the ills of the *status quo*, and/or how its 'solidarity' and/or 'prognostic frames' (see below) are misguided and/or likely to simply replace one class of oppressors – or flawed/unjust system - with another.
- 3) *Solidarity Frames*: expand from the diagnostic frame's identification of oppressive/exploitative outgroups to identify the ingroup with whom adherents should feel solidarity and shared interests. This often involves a deliberate challenge to the solidarity frames of the establishment ideology and rival anti-establishment ones. In most cases, solidarity frames propose as 'ingroup' members all those individuals perceived as facing the same oppressive enemy, although this can lead to an insular and exclusivist solidarity frame if multiple enemies are perceived to be conspiring against the ingroup.
- 4) *Basic Prognostic Frames*: based on the diagnostic frames' articulation of what is wrong with the *status quo*, basic prognostic frames articulate a vision for an alternative, more just society that can be strived towards.
- 5) *Advanced Prognostic Frames*: build upon basic prognostic frames to provide detailed blueprints of how the striven-for utopia should be achieved, implemented, and maintained. Often times, ideologies that share common diagnostic, solidarity, and basic prognostic frames schism – at times violently – over differences in advanced prognostic frames. E.g., considering Sunni Islamist ideologies, while all share the basic prognosis that a return to authentic Islam is required, they differ over what that would

look like – a totalitarian ‘caliphate’? a parliamentary democracy with a constitution informed by Islamic principles? etc.

- 6) *Strategic Frames*: more often the preserve of specific, localised ideological movements attempting to implement an ideology in a given time or place rather than being integral to the ideology itself, strategic frames propose strategic/tactical repertoires through which change can be achieved within that specific locale. This might even include the same movement proposing different strategic frames for different theatres of operation.

V. Scope and limitations:

A number of scoping limitations and disclaimers should be explicated at this stage:

Firstly, this study proposes and demonstrates a means by which we can contribute towards gradually and collaboratively constructing and refining a new ‘third’ paradigm that can aid in resetting, reconciling, and synthesising the ongoing debates over the causes of IV. It does not claim to present a complete, polished, and generalisable new paradigm itself. GA can only deconstruct, not build and, with its propensity for human error and subconscious ideological influence, it will yield its best fruit when multiple scholars carry out and debate their own genealogical investigations. CHA – which *can* help in constructing a new paradigm - can similarly make advances only incrementally, collaboratively, and dialectically. CHA practitioners no longer claim an ability to construct universal, deterministic, or predictive covering laws on such highly complex and contingent phenomena⁶⁹, and this humility is something I also take seriously. IV is far from monolithic in both causation, manifestation and trajectory, and findings derived from such small-N studies are contextually-bounded to the causal and manifest peculiarities of those cases (both the ideological movements in question and the geographical and temporal locales, contexts, and trajectories through which they popularised). Therefore, my findings should be considered methodologically-rigorous but provisional and pre-generalisable. Where this study derives its value is in demonstrating the utility of these methods for

⁶⁹ Jack A. Goldstone, *Revolution and rebellion in the early modern world* (Berkeley and Los Angeles: University of California Press, 1991), 54; Jack A. Goldstone, “Comparative Historical Analysis and Knowledge Accumulation in the Study of Revolutions,” in *Comparative Historical Analysis in the Social Sciences*, eds. James Mahoney and Dietrich Rueschemeyer (New York: Cambridge University Press, 2003), 52.

challenging entrenched conventional wisdoms and methodologically constructing interpretive and integrative causal frameworks and foundational assumptions that can be gradually abstracted, tested, substantiated, refined, delimited, and expanded upon by applying the same research design to additional case-studies. Thus, the contribution of this study is to propose and demonstrate a novel methodological roadmap to guide what is likely to be a long, collaborative, and dialectical journey towards the elusive 'third' paradigm of IV. Its offering is philosophical and methodological, rather than empirical.

It should also be clarified that my critique of the foundations underpinning extant research should not be understood as a dismissal or unqualified rejection of the many excellent and invaluable studies built upon those foundations. It is, in fact, my conviction that the construction of a new, methodologically-rigorous 'third' paradigm will better enable such studies to reap the rewards that they deserve, by providing them with an improved framework through which their findings can be more appropriately and systematically interpreted, situated, delimited, synthesised, and integrated with other valuable studies.

Additionally, while my genealogical analysis focuses heavily on the role of ideologically/culturally-conditioned narratives and assumptions, political interests, and social-historical preoccupations, etc., in shaping the dichotomised conservative and progressive paradigms (and extant attempts at synthesis), I do not seek to suggest that their emergence/adherence can be entirely reduced to such dynamics (less still to denounce paradigm adherents as ideological/political dupes, stooges, or shells!). As I have noted, there are reasonable academic reasons to favour both paradigms. Nevertheless, as the following chapters demonstrate, the genealogies of both paradigms strongly suggest the *primacy* of these cultural/ideological/political dynamics in the vital domains of paradigm conception, reification, popularisation, and institutionalisation.

VI. Positionality statement:

I cannot comment upon the assumptions and biases of others in my field without being reflexive of my own. My positionality is best expressed by an overview of my intellectual journey into the topic, both in terms of assumptions and motives going into the research, and how those assumptions and motives shifted

throughout – and as a result of – the research process. This research constitutes, after all, the final product of a deeply organic process of learning and problematisation – an internal dialectic – in which the finished form differs significantly from its original aims and assumptions.

For me, this begins in childhood with 9/11 and its aftermath. Like many of my generation (b. 1990), 9/11 and the resulting GWOT played a defining role in shaping my political and social consciousness. Not only was it the ‘headline’ story at the time at which I was first awakening to a fledgling degree of political and social consciousness but, as a boy fascinated by military history, I was rapt to watch it unfolding before me, and so perhaps paid closer attention than most. Crucially at this stage, however, this attention was decidedly superficial. While I wanted to know about every battle, my understanding of the causes and dynamics of the conflict(s) was uncritical, and I imbibed dominant public discourses with little reflection upon their validity. This credulity was partly shaped by a fairly cloistered rural, (post-)Christian upbringing which included a degree of implicit ‘othering’ vis-à-vis Muslims with whom I had had little exposure beyond the 1966 movie ‘Khartoum’ and the news stories emanating out of Iraq and Afghanistan. I thus fell easy prey to early GWOT rhetoric and, even more so, made-for-popular-consumption documentaries, TV dramas, and movies on - and personal accounts of - the GWOT, which frequently depicted the ‘enemy’ as religious totalitarians wishing to kill non-believers and impose ‘sharia law’ upon the whole world. I remember, for example, as a teenager reading a US marine’s memoir of the 2004 *Second Battle of Fallujah*, in which he described the enemy as “ideologically motivated [...] trained for years to kill us infidels⁷⁰ [...] motivated by fanatical devotion⁷¹ [...] extremists infected with a virulent form of Islam [...] they revile our culture and want it swept clean, replaced with Sharia law⁷²”. Thus, true to popular discourses, the insurgents in Iraq and Afghanistan were understood to be religious fanatics flocking to kill infidels; true to naïve assumption, the 7/7 London bombers were ‘psychopaths’ – whatever that meant to a fifteen-year-old me. As far as I was aware in my pre-university years, the GWOT was simply the latest round in a constant religious-civilisational conflict

⁷⁰ David Bellavia, *House to House: An epic memoir of war* (New York, London, Toronto and Sydney: Free Press, 2007), 48.

⁷¹ *Ibid*, 41

⁷² *Ibid*, 180.

incorporating the crusades, the Ottoman conquests and, more generally, an Islam 'spread by the sword'. At this stage in my development, Huntington's *Clash of Civilizations* thesis⁷³ appeared not only uncontroversial, but common sense. I believed uncritically the official propaganda that the 'enemy' were fanatical 'killers'⁷⁴ and, even as I learned to distinguish the 'Islam' of the terrorists from Islam writ large, I still uncritically assumed that it was religious fanaticism pure and simple that motivated them.

It was with these assumptions that I embarked, in 2008, upon my undergraduate degree in *War and Society* at Swansea University. There I undertook a module that shattered both my perceptions and my worldview irrevocably. The lecturer – through a mix of personal charisma, a flair of story-telling, and possibly too much Chomsky – cast the scales from our eyes. I, like many classmates, realised I had been duped, and it became an enduring passion project to dispel the myths I had fallen for. Most of all, I was motivated to dispel the myths that Islamically-framed violence was 1) rooted in religious fanaticism and 2) unprovoked, genocidal rage against non-believers. My BA dissertation, again relying a little too much on Chomsky, asked why we seemed to be losing the GWOT. The answer, I proposed with conviction, was that the West had transgressed too many times against the 'Muslim world' for 'them' to trust us now.

I discovered theory rather late in the game, not really coming to grips with it until my MA. As an intellectual 'late bloomer', I found myself enthralled simultaneously by *Social Movement Theory* [SMT], *Social Identity Theory* [SIT], and social psychology more broadly. Without a broader framework into which to synthesise these two schools of thoughts, my understandings of the causes of IV became confused, on one hand continuing to understand it as a (often misguided) response to legitimate grievances (à la SMT) while, simultaneously, finding it intuitively convincing that perpetrators were motivated just as much – if not more – by psychological factors such as self-esteem defence, tribalism, the desire for self-actualisation, etc. (à la SIT/social psychology). With hindsight, this should have been an early warning sign of the need for an integrative 'third' paradigm.

⁷³ Samuel P. Huntington, "The Clash of Civilizations?" *Foreign Affairs* 72(3) (Summer, 1993).

⁷⁴ "National strategy for combatting terrorism, September 2006," *The White House*, dated September 2006. Accessed February 12, 2020. Available at: <https://georgewbush-whitehouse.archives.gov/nsc/nsct/2006/>

In Autumn 2014, a year prior to commencing my MRes, I undertook an internship at the *American University of Beirut's Issam Faires Institute*. Lebanon was at that time experiencing sporadic IV from both indigenous and external militant actors mobilising under sectarian Sunni Islamist ideologies, not least the self-styled *Islamic State* [IS] (see chapters 6 and 7). In my fascination I trawled the Lebanese *Daily Star*, *Carnegie Endowment for International Peace* and similar sites for updates and analyses. What I found was a near unanimous consensus that the militants and their supporters were motivated by pervasive socio-economic and political grievances with ideology being merely a *post facto rationalisation* and locus of solidarity for those involved. My intuition swung strongly back in favour of viewing IV as a misguided response to legitimate grievances. However, my interest in SIT and social psychology lingered, still intuitively convinced but lacking a framework through which to integrate/reconcile it with my impressions from the Lebanese case. This was further complicated by my uncritical and naïve embracing of the *Radicalisation into Violent Extremism* [RVE] paradigm monopolising public and much scholarly discourse on the Islamically-framed violence phenomenon. Like many other scholars, I was attempting to shoehorn progressive paradigm assumptions into the conservative paradigm RVE iteration, with confusion resulting. My only unifying framework was that, whatever the cause, we were wrong, unjust, disingenuous, and irresponsible to attribute it to unprovoked religious fanaticism. This was my stance upon commencing my MRes and PhD proper a year later. My original PhD proposal was testament to this confusion, as I sought to ask, “to what extent do social justice imbalances [i.e., horizontal inequalities] contribute towards radicalisation?”

I became fundamentally disenchanted with RVE – and conservative paradigm more broadly - upon commencing my PhD literature review, which exposed me to critiques of the school of thought (see chapter 1). Simultaneously, my case-study research prompted growing sympathy for Marxists analyses of my Lebanese case-study. These experiences thus swung me decisively in favour of the progressive paradigm. As with my experience almost ten years prior during my BA, I again felt I had been duped, and felt compelled to push back against an RVE paradigm that seemed cynically designed to delegitimise dissent and absolve the West of all responsibility. There remained one major problem,

however. The progressive paradigm seemed unable to account for what is perhaps the *defining* feature of IV: its strong affective dynamics. Moreover, I realised that, informally, I was exercising a degree of hypocrisy by impulsively attributing delegitimising conservative paradigm dynamics towards ideological movements I had less sympathy for (or considered to lack legitimate grievances). Finally, I continued to struggle to integrate my lingering intuitive attraction to SIT/social psychology into a progressive paradigm framework. I thus realised a synthesis was needed that could integrate and delimit the best insights from both paradigms: the affective dynamics it seemed only the conservative paradigm could articulate but which it over-emphasised to the point of distortion, and the rational response to grievances only the progressive paradigm fully acknowledged, but which left so much else unanswered. Finding extant attempts at synthesis inadequate (see chapter 3), it became the *raison d'être* for my final thesis to identify a more methodological approach to achieve this end. The aforementioned contentiousness of the debate, moreover, assured me that this synthesising, integrative effort must be done as methodologically as possible and preferably in a way that seeks to transcend extant paradigms, rather than attempting to amalgamate the most helpful or convincing elements of each, as had been the approach of previous unsuccessful attempts (see chapter 3).

Finally, I should state my ontological and epistemological assumptions, encapsulated in the *Critical Realist* [CR] paradigm. While I discuss CR in more detail in chapter 4, it suffices at this stage to offer a simplified definition and surmise how it influences my personal understanding of ontology and epistemology. CR is often articulated in very complex ways, but this can serve to obscure its elegant simplicity. As Lustick⁷⁵ notes, it can essentially be summarised as an attempt to take seriously the constructionist critique of positivism, without surrendering to constructionism's fatalistic conclusions that reality is beyond our comprehension to study (or, more radically, that there exists no objective reality to study). CR holds that an objective reality does exist independent of human comprehension, but our ability to understand and study it is compromised by human limitations such as ideology, positionality, language, human error, etc. In my own words, it holds that, while valid and valuable, 'science

⁷⁵ Ian S. Lustick, "History, Historiography, and Political Science: Multiple Historical Records and the Problem of Selection Bias," *The American Political Science Review* 90(3) (Sep., 1996), 613.

is far from a perfect science'. In particular, CR argues that while causation cannot be identified through positivistic empiricism, it can be extrapolated through observation of its effects. As I discuss in chapter 4, this is achieved primarily through constructing contingent and conjunctural historical narratives rather than static relationships between sufficient and/or necessary variables; identifying 'tendencies' rather than 'laws'. It thus owes more methodologically to the historians' craft than that of the 'conventional' social scientist. This will become clearer as we progress through the dissertation.

Chapter 1: The conservative paradigm of ideological violence:

1.

The chapters in Part I of this study perform a dual function. In the first instance, they serve as a critical literature review that justifies the rationale for this study by explicating and problematising our extant IV paradigms (chapters 1-2) and extant attempts at synthesising them (chapter 3). In the process, however, they demonstrate the prominent role GA can play in paradigm 'dissection'. GA is used to: 1) reveal the discreteness and continuity of each paradigm between its conception and its most up-to-date iteration(s) in the present; and 2) reveal the hidden dynamics that have shaped and constrained its emergence and development, including the interests it served and the contingent socio-historical events, moods, and concerns that prompted key stages in that development. This all serves to denaturalise each paradigm's foundational assumptions and thus open them up to holistic critique.

This chapter begins this process by explicating, critiquing, and 'dissecting' the conservative paradigm of IV. The chapter proceeds as follows: *Section 1.1.* explicates the paradigm's three foundational assumptions on the causation of IV. *Section 1.2.* demonstrates the usage of GA in paradigm explication and 'dissection'. *Section 1.3.* problematises the paradigm on methodological, conceptual, empirical, and political grounds.

1.1. The conservative paradigm defined:

While the following GA explicates the conservative paradigm in detail – and with references – its defining features (i.e., its foundational assumptions) can be summarised as follows:

1.1.1. Foundational assumption 1: On the causation of IV:

It is assumed that IV occurs when politically-content but otherwise troubled, 'vulnerable', or 'deviant' individuals become persuaded by, and emotionally invested in, a violent ideology (a dynamic hereafter referred to as *ideological persuasion*). It is assumed these ideologies promote violence through instilling into the adherent 1) intolerant chauvinist attitudes (e.g., religious, ethnic,

nationalist, moralist, etc.); 2) conspiracy theories/false narratives of grievance and blame (e.g., erroneous claims the socio-political/socioeconomic status quo is somehow to blame for some injustice, and must be violently replaced by an alternative system); or 3) by providing an *ersatz* 'cause' to rebels currently lacking one: a deviant strategy by which troubled individuals might satisfy unmet psychological needs (e.g., meaning, belonging, purpose, self-esteem, control, ontological certainty, etc.).

1.1.2. Foundational assumption 2: On ideological popularisation:

Ideologies are believed to popularise only among a certain type of 'vulnerable' or 'deviant' individual (e.g., the gullible or impressionable, the psychologically-unfulfilled or deviant, those with intolerant 'authoritarian' personality types, the lazy or responsibility-shirking, etc.) – or, alternatively, peculiarly vulnerable cultures (usually Arab/Muslim) - and results from such individuals being exposed to propaganda or being targeted by a recruiter who exploits their vulnerability to manipulate them into becoming duped foot-soldiers for cynical, opportunistic and self-serving ideology entrepreneurs. 'Vulnerable' individuals are attracted to such ideologies either because they lack the critical thinking skills or pluralistic values to see through them, are psychologically/culturally-predisposed towards their violent and/or intolerant views, are psychologically/culturally-predisposed towards blaming others for their own failures, or else because they are seeking to satisfy basic psychological needs⁷⁶ that they have been unable to satisfy through 'ordinary' avenues⁷⁷.

1.1.3. Foundational assumption 3: on preventing/containing IV:

Such 'vulnerable' individuals must be shielded from exposure to propaganda/recruiters, and fortified against manipulation; using through educational interventions (fostering critical thinking skills and pluralistic values, etc.) or social interventions (fostering stable family and social environments, and/or fulfilling careers/extra-curricular pastimes intended to provide alternative avenues for satisfying psychological needs; or firm values that will guard against manipulation by 'degenerate' or intolerant ideas). For those *already* manipulated,

⁷⁶ As noted above.

⁷⁷ 'Ordinary' avenues being those encouraged by the establishment ideology (e.g., fulfilling careers) or non-ideological avenues such as stable family life, relationships, hobbies, etc.

there is a tension as to whether they can be returned to the straight path (through efforts to discredit or 'out-appeal' the ideology and/or through programmes aimed at reversing the process of manipulation/providing alternative avenues for satisfying psychological needs), or whether such individuals have in fact become so emotionally invested in that ideology as to be rendered irrational fanatics, inimical to reason and only neutralizable through force. Ultimately, because IV results purely from manipulation, sheltering individuals from being manipulated will naturally prevent them from developing any motive for violence or perception of grievance.

The paradigm is 'conservative' in that its emphasis on cynical manipulation and micro-causality (i.e., assuming causation lies in the personal frailties of the manipulated individual) discounts any need to scrutinise the macro-environment or take seriously the ideology's stated grievances (which are discarded as false narratives of victimhood and blame conjured ex nihilo by the ideology). IV is perceived to be an irrational act – either due to the irrationality of the beliefs that drive it, the irrationality of the individual's motives (e.g., a deviant attempt to fulfil psychological needs, shirk personal responsibility, or impose their beliefs), or the perception that perpetrators are inimical to rational debate over those beliefs. Otherwise stated, because IV occurs because something has gone wrong in the behaviour/thinking of the individual, it erases any possibility that something may have gone wrong in society. Thus, for these reasons, the ideology/movement and its actions are delegitimised, and the establishment ideology/*status quo* is upheld as unproblematic. It is what, in popular culture, we understand as either tragic 'brain-washing' (they have been manipulated into believing made-up grievances); abhorrent bigotry (they want to impose their beliefs on others); or anti-social behaviour (they are irrationally projecting their own insecurities and frustrations).

Research bounded by this paradigm seeks to elaborate upon the dynamics of such *ideological persuasion*, which it takes for granted as the causal dynamic driving IV. Research is constrained to asking questions such as: 1) how does *ideological persuasion* occur? 2) what kind of person is vulnerable to *ideological persuasion*? 3) how can we shield 'vulnerable' individuals from *ideological persuasion*? 4) how can we degrade the persuasive power of propaganda? Etc. In turn, the variables sought for investigation are constrained to the micro-realm,

focussing on what kind of individuals are likely to be endeared to ideologies/movements and/or vulnerable to *ideological persuasion*, and why.

1.2. Genealogy of the conservative paradigm:

The conservative paradigm is particularly demonstrative of the development-by-‘evolutions’ dynamic noted in the introductory chapter, the paradigm transitioning through multiple abrogating iterations in response to changing IV ‘imaginaries’ (e.g., Jacobin revolutionaries to socialist mass movements to anti-colonial rebellions, etc.) and cultural/ideological ontologies and pre-occupations, all the while retaining as truisms its foundational assumptions. These iterations – while fluid and informal prior to the most recent, highly-explicated and formulaic RVE iteration – can be roughly periodised as follows:

1.2.1. European post-revolutionary reactionism, c. 1789-1848:

The conservative paradigm first emerged in reactionary response to the 1789 *French Revolution*. Shaken by events in France, European rulers – joined by the restored French Monarchy post-Napoleon – sought to understand the upheavals to better insulate themselves against future episodes.

Reactionary theorists commenced by seeking to understand the unprecedented, sudden mass loss of deference to traditional norms and authorities which had accompanied and facilitated the revolution⁷⁸. For

⁷⁸ While previous rulers had encountered sporadic episodes of violent discontent, they had traditionally been localised, short-term and grievance-specific (e.g., bread riots over food shortages, *jacqueries* over specific feudal excesses, etc.) rather than sustained and anti-systemic. This has been helpfully conceptualised in the works of Tilly and Tarrow. They note that, prior to the French Revolution – which they conceive as marking the beginning of modern social movements – the disenchanted responded to grievances through sporadic, localised and brief acts of resistance that targeted directly the immediate cause of grievance. For example, high taxes were resisted by chasing the local tax collector out of town, grain shortages by seizing the grain stores of the local lord. This contrasted with post-French Revolution popular politics, which began attacking the broader structures that facilitated such injustices, e.g., questioning the feudal system in its entirety. See: Tilly, *Contentious Performances*, and Sidney Tarrow, “Modular Collective Action and the rise of the social movement: why the French Revolution was not enough,” *Politics & Society* 21(1) (Mar., 1993): pp. 69-90. For a more empirical exploration of this divergence, see: R.R. Palmer, *The age of democratic revolution: a political history of Europe and America, 1760-1800* (Princeton: Princeton University Press, 2014), 492. Palmer describes with particular clarity how, prior to the French Revolution, the ire of the disenchanted would often fall upon local lords, tax collectors, and scapegoats such as the Jewish community, yet deference to the Monarch was rarely shaken; whom they perceived as a loving father figure. Moreover, even in times of discontent, the masses continued to depend upon traditional authority figures, rarely entertaining radical alternatives (Ibid, 388 & 492). Meanwhile, previous ‘revolutions’ (in the *Thirteen Colonies* and *Austrian-Netherlands*) had not been considered particularly revolutionary at the time – the former perceived as a broadly conventional revolt by disgruntled vassals against their overlord; the latter a conservative re-imposition of traditional privileges/customs (see: Paul

opponents of the revolution, it appeared logical to attribute the upheavals to the ideological persuasion of the masses for two main reasons:

Firstly, while the French revolutionaries' claimed grievances were substantial, they were hardly unprecedented. Such grievances had traditionally led only to localised, short-term, grievance-specific expressions of discontent⁷⁹, the masses' traditional unquestioning deference to the sacred institutions of Church and Crown remaining intact⁸⁰. Therefore, grievances alone seemed insufficient to explain this anti-systemic sea-change. The novel anti-traditionalist ideas expressed by the revolutionaries - rooted in politicised philosophical notions of popular sovereignty, of *liberté, égalité, and fraternité* - appeared an obvious culprit⁸¹.

Secondly, the rapid spread of the upheavals across borders (allegedly as far as the colonies and the US⁸²) furthered rejection of grievances as a causal explanation. The spread of *Jacobin* ideals, not the existence of common prior grievances, appeared the common denominator across cases.

Based on these deductions, the logical next question was to consider how these irreverent ideas – so long failing to interest, yet alone persuade, the traditionally deferential masses – had so rapidly and pervasively come to influence them. The most prolific proposals posited that a vast, malevolent conspiracy of philosophers and/or occultists⁸³ had undertaken to mislead the

W. Schroeder, *The transformation of European Politics 1763-1848* (Oxford: Oxford University Press, 1994), 11 & 61; Palmer, *The age of democratic revolution*, 400; and H. G. Koenigsberger, *Early Modern Europe, 1500-1789* (Harlow, Essex: Longman Group UK Limited, 1987), 303).

⁷⁹ See previous footnote.

⁸⁰ *Ibid.*

⁸¹ See below.

⁸² I say allegedly because, as many scholars note, the panic induced by the revolution (and no small degree of conservative opportunism) saw almost any and every act of political dissent or agitation being branded – accurately or erroneously – as Jacobin-orchestrated or inspired (this theme pervades Zamoyski's exhaustive study on the topic: Adam Zamoyski, *Phantom Terror: The threat of Revolution and the repression of liberty 1789-1848* (London: William Collins, 2014) [Kindle]. See also: John Roberts, *Revolution and improvement: the Western World 1775-1847* (Berkeley: University of California Press, 1976), 116.). This included an increase in labour agitation and parliamentary reform advocacy in Britain (H.T. Dickinson, "The political context," in *The Cambridge Companion to British Literature of the French Revolution in the 1790s*, ed. Pameka Clemit (Cambridge: Cambridge University Press, 2011), 5; William Doyle, *The Oxford History of the French Revolution*, 2nd ed. (Oxford: Oxford University Press, 2002), 145; Zamoyski, *Phantom Terror*, 50 & 60); alleged Jacobin-plots and peasant land-seizures in the Habsburg lands (Palmer, *The age of democratic revolution*, 498; Zamoyski, *Phantom Terror*, 28, 30, 35, 39); an allegedly-Jacobin constitutional movement in Poland – followed by an openly Jacobin revolt against the resulting Russian interference (Zamoyski, *Phantom Terror*, 37-38); slave revolts in the colonies (*Ibid.*, 28 & 46); revolt in Ireland (*Ibid.*, 62); and the 'Whisky Rebellion' in the US (*Ibid.*, 69).

⁸³ Various theories were posited as to the culprits, but most laid blame upon an alliance of philosophers and occultist *illuminati*, who had formed the Jacobin clubs as a front for perpetuating

naively gullible uneducated masses⁸⁴ to harness them as unwitting foot soldiers in a sinister – even satanic – project to subvert and destroy the ‘natural’ order of church and crown⁸⁵. Specifically, ‘secret societies’ were believed to have employed various strategies of ‘seduction’ and corruption⁸⁶ to degrade the moral/religious fibre of the masses (from which their traditional deference naturally sprang) and, once sufficiently alienated and de-moralised, inculcate them with an erroneous utopian narrative – a ‘freedom swindle’ (i.e., Jacobinism) – designed to spur them into irrational violence against rulers they had previously held no qualms against⁸⁷. So conceived, the IV-perpetrator was a victim in need of rescue – but not from the grievances they claimed, but rather from the manipulators who had cynically sold them those grievances conjured *ex nihilo*⁸⁸.

This narrative was popularised by several best-selling polemics published following the revolution⁸⁹ and reified by a prolific new genre of ‘anti-Jacobin’

their anti-monarchical and anti-clerical ideas. This line of thought resulted from equations being drawn between the ideas of the philosophers – particularly Voltaire – and Jacobinism. see: Amon Hofman, “Opinion, Illusion, and the Illusion of Opinion: Barruel’s Theory of Conspiracy,” *Eighteenth-Century Studies* 27(1) (Autumn, 1993): pp. 27-60; Zamoyski, *Phantom Terror*, 16-20, 74 & 273; Doyle, *The Oxford History of the French Revolution*, 145; Michael Lienesch, “The Illusion of the Illuminati: the counterconspiratorial origins of post-revolutionary conservatism,” in *Revolutionary Histories: Transatlantic Cultural Nationalism, 1775–1815*, ed. W. M. Verhoeven (New York: Palgrave, 2002), 152-155; and Michael Taylor, “British Conservatism, the Illuminati, and the Conspiracy Theory of the French Revolution, 1797–1802,” *Eighteenth-Century Studies* 47(3) (Spring 2014), 294.

⁸⁴ These ‘secret societies’ were said to pray upon the “naïve and suggestible” (Stewart McCain, “Justifying Conspiracy and Legitimizing Political Violence in Restoration France,” *Retrospective 2* (Spring 2013), 61) and those envious of the wealthy (Palmer, *The age of democratic revolution*, 481), all of whom became “simple-minded dupes of the conspirators” (Hofman, “Opinion, Illusion, 41).

⁸⁵ Hofman, “Opinion, Illusion,” 28; Lienesch, “The Illusion of the Illuminati,” 152 & 156; Taylor, “British Conservatism,” 293; Doyle, *The Oxford History of the French Revolution*, 145; Zamoyski, *Phantom Terror*, 18 & 43.

⁸⁶ Resulting largely from perceived correlations between the spread of Jacobinism and falls in church attendance (and rise in religious dissenter groups such as Methodism), alongside Jacobinism’s vocal clericalism, it was broadly believed that the conspirators had deliberately sought to degrade both the moral and religious faculties of the masses so as to dupe them against the rightful order (Zamoyski, *Phantom Terror*, 43, 67, 70, 106, 146, 182 & 235). Additionally, they were believed to have insinuated themselves into various institutions of state and society to spread their corrupting ideas, even changing the meaning of words such as “reason,” “equality” and “liberty,” all in the name of fomenting revolt (Hofman, “Opinion, Illusion,” 28, 39 & 50. See also: Zamoyski, *Phantom Terror*, 74).

⁸⁷ Zamoyski, *Phantom Terror*, 41 & 33.

⁸⁸ *Ibid*, 73 and, more generally, throughout. Once this conspiracy had born fruit in France, these ideas were imbibed - through ‘contagion’ - by those witnessing the upheavals beyond France, propelling them to misguided attempts at emulation, all the while encouraged by a subversive French propaganda apparatus which was believed – without evidence – to have tentacles all over Europe. This belief in a French revolutionary ‘club de propagande’ became near ubiquitous following France’s 1792 *Edict of Fraternity* which pledged French support to all people wishing “to recover their liberty.” see: Roberts, *Revolution and improvement*, 106 & 114; Palmer, *The age of democratic revolution*, 412 & 494; Zamoyski, *Phantom Terror*, 32.

⁸⁹ Notably Edmund Burke’s 1790 work *Reflections on the Revolution in France*, John Robison’s 1798 *Proofs of a Conspiracy Against All the Religions and Governments of Europe, carried on in*

novels⁹⁰ and much pulpit sermonising⁹¹. It attained *de facto* orthodoxy among Europe's ruling classes, dictating their responses during and after the upheavals⁹². They embraced epidemiological language – 'contagion', 'delirium', 'pestilence' – to conceptualise the dynamics of *ideological persuasion*, believing ideologies fed upon morally 'gangrened' societies⁹³. The response proffered to such social disease was one of quarantine and inoculation: quarantine involving the censorship of potential seditious literature⁹⁴ and the hunting down of propagandists/conspirators⁹⁵; inoculation requiring repairing society's moral/religious fabric to restore traditional differences and strengthen the masses against ideological persuasion⁹⁶. Counterpropaganda was also employed

the secret meetings of Free Masons, Illuminati and Reading Societies, and Augustin Barruel's 1797 *Memoirs Illustrating the History of Jacobinism*. All of these works, and other lesser workers proffering the same general thesis, were reified in dozens of other pamphlets, abridgements and press reviews. For summaries and contextualised discussions, see: Hofman, "Opinion, Illusion,"; Graeme Garrard, *Counter-Enlightenments: From the eighteenth century to the present* (Oxon: Routledge, 2006), 37-43; Dickinson, "The political context,"; Taylor, "British Conservatism,"; and Lienesch, "The Illusion of the Illuminati".

⁹⁰ Particularly in Germany (which seized upon the theme of occult conspiracies inspired by the Illuminati conspiracy theory – see: Zamoyski, *Phantom Terror*, 71-72) and in Britain (which focussed more on the irrational bloodlust of the revolutionary masses, whipped into hysteria by conspiratorial provocateurs. See: Taylor, "British Conservatism," 298.

⁹¹ Taylor, "British Conservatism," 297-298.

⁹² This is the primary theme of Zamoyski, *Phantom Terror*. See also: McCain, "Justifying Conspiracy," 57; and Taylor, "British Conservatism," 294.

⁹³ This tendency is documented throughout Zamoyski, *Phantom Terror*.

⁹⁴ European governments attempted to implement a *cordon sanitaire* around France to stem the flow of revolutionary ideas into their own countries. Meanwhile, they fervently searched literature, songs and artistic performances for anything that could be seen as promoting revolution, irreverence or generally morally-corrupting ideas, and implemented laws banning seditious publications. See: Robert Justin Goldstein, "Introduction," in *The War for the Public Mind: Political Censorship in Nineteenth-century Europe*, ed. Robert Justin Goldstein (Westport, CT: Praeger, 2000); Zamoyski, *Phantom Terror*, 33; Jonathan Sperber, *The European Revolutions, 1848-1851*, 2nd ed. (Cambridge: Cambridge University Press, 2005), 60; David Thomson, *Europe since Napoleon* (London: Lowe and Brydone (Printers) Ltd., 1957), 31 & 90; Doyle, *The Oxford History of the French Revolution*, 146-148.

⁹⁵ The French Revolution is indeed credited with transforming the very institution of policing and the birth of the first police states. In all the countries of Europe the police burgeoned and used spies and *agents provocateur* to detect and entrap potential revolutionary agents. See: Clive Emsley, "Introduction: Political Police and the European Nation-State in the nineteenth century," in *The Policing of Politics in the Twentieth Century: Historical Perspectives*, ed. Mark Mazower (Oxford: Berghahn Books, 1997); Ido de Haan and Jeroen van Zanten, "Constructing an International Conspiracy: Revolutionary Concertation and Police Networks in the European Restoration," in *Securing Europe after Napoleon: 1815 and the New European Security Culture*, eds. Susanne Keesman et al. (New York: Cambridge University Press, 2019); Karl Härter, "Security and Cross-Border Political Crime: The Formation of Transnational Security Regimes in 18th and 19th Century Europe," *Historical Social Research/Historische Sozialforschung* 38(1) (2013): pp. 96-106.

⁹⁶ This included the re-empowering of church oversight over and involvement in education (which had been on the decline prior to the revolution) (Thomson, *Europe since Napoleon*, 84; Palmer, *The age of democratic revolution*, 502), state-funded church-building programmes (Zamoyski, *Phantom Terror*, 142) and, in Spain and Italy, the return of the Inquisition (Thomson, *Europe since Napoleon*, 84). More broadly, Russia, Prussia and Austria ended the Napoleonic Wars by entering a *Holy Alliance*, which hoped to protect against future revolutions through fostering an alliance

(through government-sponsored newspapers) to extol the virtues of the old order and denounce Jacobinism⁹⁷. Debates also raged inconclusively over the risks and potentials of education and reform (particularly constitutionalism). In both domains, opinion split between those who saw such advances as prophylactics (education aiding individuals to see through manipulative *ideological persuasion*⁹⁸ and constitutionalism providing safeguards for the new post-deference world⁹⁹, respectively) and those who viewed them as slippery slopes towards the *imbibing* of dangerous ideas¹⁰⁰ and escalating demands¹⁰¹, respectively.

So far, this discussion has focused on the simplistic deductive reasoning driving the conservative paradigm's foundational assumptions. However, its achievement of hegemony among reactionary regimes was also influenced by ideological interests. Historians generally agree that, while this narrative was sincerely believed by many in the ruling classes, it was also employed cynically as a means of discrediting *any* expressions of dissent (e.g., labour strikes or bread riots) by labelling them as products of Jacobin subversion, while the paternalist ideology of the ruling classes predisposed them to automatically reject any ideological vision challenging the old hierarchies¹⁰².

between church and state, itself fostering renewed religious deference (Ibid, 76; Eric Hobsbawm, *The Age of Revolution 1789-1848* (New York: Vintage Books, 1996 [1962]), 230).

⁹⁷ Zamoyski, *Phantom Terror*, 40 & 48.

⁹⁸ This was the view of the young Russian Tsar Alexander, King George III of England and post-revolutionary French Minister Adolph Theirs. They advocated education as a means of "developing patriotism and refuting subversive ideas", particularly instilling the 'knowledge' that "suffering is necessary in all estates" and that "when the poor have a fever, it is not the rich who have sent it to them." see: Goldstein, "Introduction," 4. See also: Zamoyski, *Phantom Terror*, 7; and Christopher Harvie, "Revolution and the rule of law (1789-1851)," in *The Oxford History of Britain*, revised ed., ed. Kenneth O. Morgan (Oxford: Oxford University Press, 1988), 502.

⁹⁹ The pro-constitutionalist camp, notably Britain and the young Tsar Alexander, recognised that legitimacy could no longer be based on obedient deference to church and crown, and that modernising reforms and constitutions were the best way to restore legitimacy and act as a backstop against more radical agitation (Zamoyski, *Phantom Terror*).

¹⁰⁰ To this camp - exemplified by the Habsburg Empire, the later ideas of Tsar Alexander and his successor, Tsar Nicholas II – education equipped individuals to imbibe seditious and erroneous ideas at will. Austrian Police President Count Joseph Sednitzsky spoke for many when he warned "people will read themselves into criminals". See: Goldstein, "Introduction," 5. See also: Palmer, *The age of democratic revolution*, 502; and Zamoyski, *Phantom Terror*, 31.

¹⁰¹ Habsburg Austria was particularly intractable when it came to this position (Zamoyski, *Phantom Terror*, 181; Thomson, *Europe since Napoleon*, 116). This camp felt vindicated after Poland – a country granted the most liberal constitution in Europe by Tsar Alexander following the Napoleonic Wars – exploded in revolution in 1830; see: Brian Porter, *When Nationalism began to Hate: Imagining modern politics in nineteenth-century Poland* (New York: Oxford University Press, 2000), 18.

¹⁰² This is discussed throughout Zamoyski, *Phantom Terror*, particularly pages 48, 52-55, & 152.

This focus on revolutionary conspiracies became a self-fulfilling prophecy, by encouraging pro-revolutionary dissidents to create their own ‘secret societies’ to foment fresh revolutionary upheavals throughout the restoration era¹⁰³. Despite the negligible actual success of such endeavours¹⁰⁴, the existence of such groups burnished the credibility of the conservative paradigm, and they were held accountable for a string of upheavals between 1820 and 1848¹⁰⁵.

As will become apparent throughout the rest of this genealogical review, the foundational assumptions promulgated and reified during this period set the tone for reactionary thinking on IV moving forward. While iterations and sub-paradigms would evolve in response to evolving establishment ideologies, scientific/quasi-scientific fashions, societal trends and conditions, and IV ‘imaginaries’, the foundational assumptions themselves would remain unquestioned, largely for political reasons.

1.2.2. Bourgeois anti-socialism, c. 1848-1933:

The first significant conservative paradigm ‘evolution’ occurred as the feudal order of the *ancien régimes* gradually gave way to the new *bourgeois* order¹⁰⁶. This new ‘enlightened’ ruling class did not base its legitimacy on religious deference¹⁰⁷, but rather upon an ideology of ‘meritocratic’ *classical liberalism* holding that – through industry and ingenuity – advancement was equally open to all. This ideology justified the political dominion of the wealthy, in that their material successes proved their superior work-ethic, abilities, intelligence, and dynamism. By deduction, it justified wealth disparities by attributing poverty to laziness and/or moral weakness¹⁰⁸. By extension, these assertions delegitimised

¹⁰³ See Chapter 2.

¹⁰⁴ Scholars note that, despite multiple attempts between 1815 and 1848, these secret societies failed to ring in a single success (with the arguable exception of short-lived successful elite coups instigated by secret societies – but without sufficient popular support - in 1820 Spain and Naples), while the three waves of popular revolutions that did take place between these dates (1820-21, 1830 and 1848) were neither fomented nor directed by secret societies. See: Mike Rapport, *1848: Year of Revolution* (London: Hachette Digital, 2008), 21; Hobsbawm, *The Age of Revolution*, 116; Sperber, *The European Revolutions*, 63.

¹⁰⁵ De Haan and van Zanten, “Constructing an International Conspiracy,” 177-191; Zamoyski, *Phantom Terror*, 247.

¹⁰⁶ Beginning approximately with the 1830 revolutions, but really taking off in the post-1848 revolutionary period, see: Eric Hobsbawm, *The Age of Capital 1848-1875* (London: Abacus, 1995 [1975]), 38.

¹⁰⁷ Ibid.

¹⁰⁸ These dominant attitudes – which became increasingly buttressed both by Social Darwinism and proto-biological theories on the supposed genetic differences between the wealthy and poor

the burgeoning socialist/labour movements, in that morally-upright individuals worked their way up the social ladder, rendering anti-establishment agitation a symptom of moral weakness. From here, conservative paradigm conspiracist tropes found easy purchase: anti-establishment agitation being denounced as product of self-serving ‘rabble rousers’ – chiefly cadres of the *Communist International* – who exploited the weak moral fibre of those destitute people too lazy to advance themselves to sell them a new ‘freedom swindle’ cloaked in the erroneous villainising discourses of socialism; one which enabled the destitute to project blame for their own failings on their betters¹⁰⁹. In the US, this iteration was lent further credence by the cultural narrative of American exceptionalism – expressed by the ‘American Dream’ narrative – which led many to believe that, even if resentment over wealth disparities might hold some limited legitimacy in the backwards ‘old world’, it had no logical place in the free and meritocratic US¹¹⁰. Therefore, labour agitation and other forms of socialist dissent could only be understood as the product of European immigrants importing alien ideas that held no place or credence in US society¹¹¹.

Conservative paradigm foundational assumptions were further reified and elaborated during this period by the emergent quasi-scientific trends of crowd and criminal psychology. Observing the preponderance of labour agitation and anarchist terrorism in industrial cities, ‘crowd psychology’ hypothesised that urbanisation – or simply large gatherings - bread overly-stimulated ‘mass

and/or hardworking and criminal classes – are thoroughly explored in the works of Hobsbawm, Zinn, and Lindemann. See: Hobsbawm, *The Age of Revolution 1789-1848*, 198-199; Hobsbawm, *The Age of Capital*, 13, 176, 312-314; Eric Hobsbawm, *The Age of Empire 1875-1914* (New York: Vintage Books, 1989 [1987]), 32, 254; Howard Zinn, *A People’s History of the United States* (London: Longman, 1980), 256; and Albert S. Lindemann, *A History of European Socialism* (New Haven and London: Yale University Press, 1983), 54, 117.

¹⁰⁹ Communist agitators were viewed as whipping up the poor’s jealousies towards the rich to mobilise them for IV against the *status quo*. While this was a constant theme throughout the period, the idea of a vast Communist conspiracy – akin to the French Revolution’s conspiracy of the philosophes – crystallised on both sides of the Atlantic following the 1870 *Paris Commune*, which was roundly attributed to a conspiracy by Karl Marx and the Communist Internationale. See: Lindemann, *A History of European Socialism*, 55, 108, 121-125; Hobsbawm, *The Age of Revolution*, 214; Hobsbawm, *The Age of Capital*, 201; Eugene E. Leach, “Mental Epidemics’: Crowd Psychology and American Culture, 1890-1940,” *American Studies* 33(1) (Spring, 1992), 9; Daria Frezza, *The Leader and the Crowd: Democracy in American Public Discourse, 1889-1941*, trans. Martha King (Athens and London: University of Georgia Press, 2007), 21-23 and 126; Regin Schmidt, *Red Scare: FBI and the origins of Anticommunism in the United States, 1919-1943* (Copenhagen: Museum Tusulanum Press, University of Copenhagen, 2000), 24.

¹¹⁰ Hobsbawm, *The Age of Capital*, 166; Zinn, *A People’s History*, 218; Frezza, *The Leader and the Crowd*, 22 & 62.

¹¹¹ Zinn, *A People’s History*, 218 & 235; Frezza, *The Leader and the Crowd*, 22; and Frank J. Donner, *The Age of Surveillance: The aims and methods of America’s political intelligence system* (New York: Alfred A. Knopf, Inc., 1980), 18.

societies' that degraded individual moral and rational faculties alongside traditional deferences and hierarchies. This loss of faculties and disruption of norms rendered individuals more vulnerable to the power of 'suggestion'; including the manipulative rhetoric of rabble-rousing freedom swindlers¹¹². Crowd psychology spoke to the interests of the ruling classes by once more delegitimising dissent as irrational (indeed, the impulse for crowd psychology's formulation was reactionary attempts to explain – or, arguably, discredit - the 1871 *Paris Commune*¹¹³). Moreover, it resonated with a broader cultural preoccupation/moral panic over societal 'degeneration' and 'decadence', characterised by popular fears that modern society was weakening the moral fibre and mental/rational faculties of individuals – variously as a result of new luxuries, urbanisation, or alien cultural encroachments¹¹⁴ - to such an extent that even 'morally-upright' bourgeois gentlemen were encouraged to fortify themselves against the threat of 'moral contagion' (i.e. 'suggestion'/*ideological persuasion*)¹¹⁵. Criminal psychology served a similar purpose of de-legitimising dissent by proposing genetic differences between 'honest' working-class individuals who toiled to improve their lot within the system versus those *classes dangereuses* who sought to overthrow it¹¹⁶. The implication, once again, was that ideologies - with their stated grievances - were merely insincere foils concealing criminal intent.

These narratives peaked during the interwar 'Red Scare' in the US, during which any and all labour agitation was attributed to rabble-rousing by subversive

¹¹² Key texts in this regard were the French Taine, Tarde and Le Bon, the American Ross and, in more nuanced form, the Austrian Freud. Detailed overviews of these schools of thought and the socio-political milieu in which they emerged can be found in: Christian Borch, *The Politics of Crowds: An Alternative History of Sociology* (Cambridge: Cambridge University Press, 2012); Christopher E. Forth, "Moral contagion and the will: the crisis of masculinity in the fin-de-siècle France," in *Contagion: Historical and Cultural Studies*, eds. Alison Bashford and Claire Hooker (New York: Routledge, 2001); John Drury & Clifford Stott, "Contextualising the crowd in contemporary social science," *Contemporary Social Science* 6(3) (2011): pp. 275-288; Stephen Reicher, "The Psychology of Crowd Dynamics," in *Blackwell Handbook of Social Psychology: Group Processes*, eds. Michael A. Hogg and R. Scott Tindale (Malden, Massachusetts: Blackwell Publishers Ltd., 2001); Leach, "'Mental Epidemics'," Frezza, *The Leader and the Crowd*; Clifford Stott and John Drury, "Contemporary understanding of riots: Classical crowd psychology, ideology and the social identity approach," *Public Understanding of Science* 26(1) (2017): pp. 2-14.

¹¹³ Drury & Stott, "Contextualising the crowd," 276-277; Frezza, *The Leader*, 54; Borch, *The Politics*, 29-31.

¹¹⁴ Jenny Bourne Taylor, "Psychology at the fin de siècle," in *The Cambridge Companion to the Fin de Siècle*, ed. Gail Marshall (Cambridge and New York: Cambridge University Press, 2007), 14.

¹¹⁵ See footnote 110 below.

¹¹⁶ Lindemann, *A History of European Socialism*, 54; Hobsbawm, *The Age of Capital*, 312-314; Hobsbawm, *The Age of Empire*, 32.

Soviet Agents¹¹⁷. Discoveries that Soviet agents had indeed infiltrated certain positions within the Federal government and various labour unions appeared to vindicate the enduring vitality of this conspiracist model¹¹⁸.

Proposed responses to such threats remained broadly one of quarantine¹¹⁹ and inoculation¹²⁰. Additionally, establishment defenders increasingly mastered strategies of co-optation (i.e. finding ways to manipulate anti-establishment ideas so that they might be incorporated into the establishment ideology)¹²¹, divide-and-rule (seeking to manipulate those ideas so as to turn ideology/movement adherents against one another)¹²², ideological

¹¹⁷ Schmidt, *Red Scare*, 24-26; Robert Alan Goldberg, *Enemies Within: The Culture of Conspiracy in Modern America* (New Haven and London: Yale University Press, 2001), 22.

¹¹⁸ Goldberg, *Enemies Within*, 22-25.

¹¹⁹ Quarantine continued to mean hunting down subversive agents and secret organisations believed to be spreading ideologies and fomenting dissent, as well as banning more overt organisations viewed as fomenting or encouraging (by their mere existence) the spread and embrace of ideologies; e.g. trade unions and socialist political parties. This latter practice prevailed in most of Europe (with the exception of the UK), most famously enacted in the 1878 anti-socialist laws imposed upon Germany by Chancellor Otto von Bismark. See: Emsley, "Introduction," 13; Hobsbawm, *The Age of Capital*, 134, 142 & 201; Lindemann, *A History of European Socialism*, 136; Robert Gildea, *Barricades and Borders: Europe 1800-1914* (Oxford University Press, 1987), 136; Mary Fulbrook, *A Concise History of Germany*, 2nd ed. (Cambridge: Cambridge University Press, 1991), 133; Zinn, *A People's History*, 247. In the US, it additionally meant vigilant border controls, to prevent the entry of ideology-carrying immigrants. See: Schmidt, *Red Scare*, 27-34.

¹²⁰ Ideas on methods of inoculation had evolved markedly with the secular, humanist and scientific turn. While counter-propaganda and indoctrinating forms of education remained pertinent (with an ethos on cultivating patriotic sentiments and preaching the gospel of meritocratic capitalism – see: Zinn, *A People's History*, 257; James H. Billington, *Fire in the Minds of Men: Origins of the Revolutionary Faith* (London and New York: Routledge, 2017 [1980]), 337-343); the new conventional wisdoms informed by crowd psychology also encouraged individuals to "fortify their manly will" so as to protect them from the dangers of 'suggestion' and 'moral contagion'. Fortification could be achieved through "physical culture and mental discipline" (Forth, "Moral contagion," 62), "physical conditions, hygiene, sport and exercise" (Borch, *The Politics*, 138).

¹²¹ Prominent examples include various initiatives by the likes of France's Emperor Louis Napoleon III and German Chancellor Otto von Bismarck to establish social welfare schemes as a means of undercutting the socialist *raison d'être*, as well as establishing/funding faux-socialist newspapers intended to hijack and redirect socialist discourses (Billington, *Fire in the Minds*, 343; Hobsbawm, *The Age of Capital*, 91; Fulbrook, *A Concise History of Germany*, 134). Blunter initiatives include the Habsburg Empire's decision to emancipate the Serfs during the 1848 revolutions so as to snatch their support from the Liberal Revolutionaries who had promised them the same (Hobsbawm, *The Age of Capital*, 33).

¹²² In Europe such strategies were demonstrated masterfully during the 1848 revolutions. In France, counterrevolutionary forces successfully pitted middle-class and peasant revolutionaries against their working-class co-revolutionaries by spreading fears of communistic assaults on their property (Hobsbawm, *The Age of Capital*, 30) and by taxing peasants to fund a public works scheme, which Marx perceived to be a deliberate ploy to provoke peasant resentment of the urban workers (Karl Marx, *The Class Struggles in France, 1848-1850* (Marxist Archive, 2010 [1850])).

Available at: https://www.marxists.org/archive/marx/works/download/pdf/Class_Struggles_in_France.pdf, 22). In the Habsburg lands, counterrevolutionary forces exploited Slavic nationalism to divert their ire away from the Habsburgs and towards their Hungarian/Magyar nationalist co-revolutionaries, whom they accused of wishing to render Slavs second-class citizens in a Magyar-chauvinist nation-state (Rapport, *1848*, 134-139, 186 & 275). In the US, counterrevolutionaries adeptly undermined working-class solidarity by cultivating racial hatreds (between whites, blacks, Asians, Catholics and immigrants in general) through "rewarding [labourers] differently by race, sex,

diversion (attempting to prize perpetrators away from their chosen ideology (e.g. socialism) by appealing to an alternative one (e.g. nationalism))¹²³; and, briefly (before such practices were fatally tainted by association with fascism¹²⁴), attempts to harness crowd psychology's notion of 'suggestibility' for pro-establishment ends¹²⁵. More grimly, it was increasingly surmised that, if IV perpetrators were irrational, then violent repression/deterrence was the only language they would understand¹²⁶; a logic most brutally exhibited in the mass bloodshed and punitive transportations that followed the suppression of the *Paris Commune*¹²⁷.

1.2.3. Colonial orientalism, c. 1830-1945:

Simultaneously, a separate, highly-pernicious conservative paradigm iteration evolved among colonial administrators - particularly those administering Muslim-majority territories¹²⁸ - retaining the now highly-reified conservative paradigm foundational assumptions while specifying them to the particularities of colonial ideology and anti-colonial IV imaginaries. The pervasiveness of Muslim popular resistance to colonialism - often expressed using Islamic rhetoric¹²⁹ – was widely interpreted as product of religious 'fanaticism' and 'bigotry'¹³⁰; characteristics

national origin, and social class, in such a way as to create separate levels of oppression" and by employing minorities as strike-breakers when white labourers engaged in labour activism (Zinn, *A People's History*, 216-247).

¹²³ As noted, counterrevolutionary forces learned to harness education, popular media and entertainment to cultivate nationalist/nativist sentiments as a means of fostering vertical, inter-class solidarity and subverting horizontal inter-national solidarity. See: Hobsbawm, *The Age of Empire*, 142-144; Mohamed Ismail Sabry, *The development of Socialism, Social Democracy and Communism: Historical, political and socioeconomic perspectives* (Bingley: Emerald Publishing Limited, 2017), 4; Gildea, *Barricades and Borders*, 314; and Billington, *Fire in the Minds*, 342.

¹²⁴ Leach, "'Mental Epidemics'," 25.

¹²⁵ Ibid, 23-25; Stott and Drury, "Contemporary understanding of riots," 9; Reicher, "The Psychology of Crowd Dynamics," 165; Frezza, *The Leader and the Crowd*, 128.

¹²⁶ Stott and John Drury, "Contemporary understanding," 9; Reicher, "'The Crowd' century," 540.

¹²⁷ The French army deployed artillery and overwhelming force to eject the Communards from Paris, killing 20,000 of them in the process. Moreover, 13,000 survivors were transported to prison colonies overseas. See: Billington, *Fire in the Minds of Men*, 348.

¹²⁸ Chiefly British-ruled India and Sudan, French-ruled North Africa, Russian-occupied Caucasia and Central Asia, and the US-occupied Philippines.

¹²⁹ Mark Condos, "'Fanaticism' and the politics of resistance along the North-West frontier of British India," *Comparative Studies in Society and History* 58(3) (2016), 727.

¹³⁰ Condos, "'Fanaticism'"; Benjamin D. Hopkins, "Islam and Resistance in the British Empire," in *Islam and the European Empires*, ed. David Motadel (Oxford: Oxford University Press, 2014); Albert Toscano, *Fanaticism: On the uses of an idea*, new expanded ed. (London: Verso, 2017 [2010]). [Kindle], location 65 and 420; Alex Padamsee, *Representations of Indian Muslims in British Colonial Discourse* (New York: Palgrave Macmillan, 2005), 58; Benjamin D. Hopkins and Magnus Marsden, *Fragments of the Afghan Frontier* (London: C. Hurst & Co. (Publishers) Ltd., 2011), 76-81; Sameetah Agha, "Demystifying 'Millenarianism': Oral Historical Evidence of Pukhtun Resistance and Colonial Warfare in the North-West Frontier of British India," in

Muslims were considered peculiarly prone to on account of Islam's supposedly irrational, totalitarian, and intolerant nature¹³¹. Such assumptions were natural products of 19th century European orientalism, in which the Muslim world was routinely cast as the 'barbarous' 'other' against which the 'civilised' West defined itself: Western rationality against oriental irrationality, freedom vs. despotism, enterprise vs. stagnation, etc.¹³² Conveniently for supporters of colonialism (and its pretensions to benevolence), Muslim resistance could be dismissed as expressions of such traits¹³³ - chauvinistic rage, whipped up by their clerics¹³⁴, against religious/cultural outsiders – rather than resulting from any objective grievances against foreign occupation, exploitation, disruption, and imposition, etc. Following the 1857 *Indian Mutiny*, there even popularised a French Revolution-style conspiracy theory – endorsed by the British colonial authorities - attributing the upheaval to a vast 'Wahhabi conspiracy'¹³⁵ (similar theories were posited of Sufi lodges by French colonial authorities in North Africa¹³⁶). With anti-colonial IV conceived in this way, anti-IV measures were ruthless, proposing that violence alone would be understood by religious bigots impervious to reason¹³⁷.

1.2.4. Comprehending fascism, c. 1933-1955:

The popularisation of fascism in interwar Europe constitutes an important chapter in conservative paradigm reification and evolution, as it reified and elaborated upon the dynamics of *ideological persuasion* in a significant way. Specifically, scholars built upon 'crowd psychology' and the new vogue of Freudian mass psychology to attribute the popularisation of fascism, particularly Nazism, to

Resistance and Colonialism: Insurgent Peoples in World History, eds. Nuno Domingos, Miguel Bandeira Jerónimo and Ricardo Roque (Cham, Switzerland: Palgrave Macmillan, 2019), 37.

¹³¹ Condos, "'Fanaticism'," 721, 725, 731; Agha, "Demystifying 'Millenarianism'," 37.

¹³² Zachary Lockman, *Contending Visions of the Middle East: The History and Politics of Orientalism* (Cambridge: Cambridge University Press, 2004), 46, 57-63, 77-78; Davide Rodogno, *Against Massacre Humanitarian Interventions in the Ottoman Empire, 1815–1914: The Emergence of a European Concept and International Practice* (Princeton and Oxford: Princeton University Press, 2012), 38-40.

¹³³ Condos, "'Fanaticism'," 721, 725, 731; Agha, "Demystifying 'Millenarianism'," 37.

¹³⁴ Reynaldo Ileto, "Religion and anti-colonial movements," in *The Cambridge History of Southeast Asia: Volume 2: The Nineteenth and Twentieth Centuries*, ed. Nicholas Tarling (Cambridge: Cambridge University Press, 1993), 197; Hopkins, "Islam and Resistance," 150.

¹³⁵ Padamsee, *Representations of Indian Muslims*, 58; Julia Stephens, "The Phantom Wahhabi: Liberalism and the Muslim fanatic in mid-Victorian India," *Modern Asian Studies* 47(1) (Jan., 2013), 29; Zak Leonard, "Muslim 'Fanaticism' as Ambiguous Trope A Study in Polemical Mutation," in *Mountstuart Elphinstone in South Asia: Pioneer of British Colonial Rule*, ed. Shah Mahmoud Hanifi (London: C. Hurst & Co. (Publishers) Ltd., 2019), 91.

¹³⁶ Condos, "'Fanaticism'," 723.

¹³⁷ Hopkins, "Islam and Resistance," 161; Leonard, "Muslim 'Fanaticism'," 93.

orators like Hitler and Mussolini capturing the loyalty of their countrymen not through the (quasi)addressing of their grievances, but rather through the power of ‘hypnotic suggestion’¹³⁸. Hitler, in particular, was bitterly applauded for his supposed ability to tap into the cultural collective subconscious of the German people, whipping them into a devotional frenzy by appealing to deeply ingrained cultural symbology and tropes¹³⁹.

Importantly, this focus on irrational – even ‘hypnotic’ – appeal was encouraged and embraced by a broader post-First World War preoccupation/moral panic over the ‘crisis of modernity’, which built on *fin de siècle* concerns of ‘degeneracy’ by suggesting that the wildfire escalation and carnage of the First World War – and following ‘age of extremes’ - was proof that man was not the rational creature envisaged by the Enlightenment philosophes¹⁴⁰; a conclusion that also prompted an ‘irrational turn’ in marketing techniques¹⁴¹.

Building on 19th century prescriptions on fortifying one’s faculties against ideological ‘suggestion’, scholars urged governments to inoculate their citizens by educating them on the means and methods of suggestive propaganda¹⁴² while making counter-appeals towards their more rational faculties¹⁴³. The abiding assumption here is shaped by *status quo*-normativity: the assumption that the *status quo*/establishment ideology is inherently rational and appealing, and that anti-establishment ideologies – which are inherently irrational and repulsive to the rational mind - only find followings when they are able to falsely represent the establishment and/or appeal to the irrational, atavistic impulses of an individual/group (an assumption that would carry over into the post-Second World War ‘consensus’ period – see below). Strengthen those rational faculties and teach citizens how to identify false representations of the establishment, and the threatening ideology will lose all persuasive power.

1.2.5. Cold War anti-communism, c. 1947-1991:

¹³⁸ Reicher, “‘The Crowd’ century,” 537; Frezza, *The Leader and the Crowd*, 196.

¹³⁹ Frezza, *The Leader and the Crowd*, 207-208.

¹⁴⁰ Susan Currell, *American culture in the 1920s* (Edinburgh: Edinburgh University Press, 2009), 12; Robert O. Paxton, *Europe in the Twentieth Century*, 4th ed. (San Diego, CA: Harcourt Brace Jovanovich, 1985 [1975]), 41.

¹⁴¹ Leach, “‘Mental Epidemics’,” 24; Frezza, *The Leader*, 128.

¹⁴² Frezza, *The Leader*, 187; Leach, “‘Mental Epidemics’,” 25.

¹⁴³ *Ibid.*

As chapter 2 demonstrates, the Cold War saw the first nuances begin to develop in hegemonic understandings of IV. In contrast to prior IV threats, which had directly challenged the establishment, the Cold War saw the main (communist) IV threats afflicting areas where the establishment ideology was absent or not functioning properly (war-ravaged Europe, decolonising territories, and/or countries suffering the dislocations of rapid and/or even/stunted modernisation). Ideological popularisation in such locales could be unproblematically – even expediently – attributed to prior grievances (*à la* progressive paradigm – see chapter 2), as those grievances could plausibly be interpreted as products of the *absence* of the establishment ideology rather than its presence. Understood like this, the establishment ideology was not only unchallenged but even elevated: communism, it was supposed, would quickly lose support once populations in those afflicted areas had had a chance to experience for themselves the ‘far superior’ quality of life offered by US-style consumerist, capitalist, democratic modernity¹⁴⁴.

Such explanations became problematic, however, when attempting to explain communist ideological popularisation within the free, modernised, and prosperous US (and Western Europe once it had sufficiently recovered from the destruction of World War II). Policymakers like FBI director Hoover asked: “Why, you may ask, do these individuals join [the communists]? And why, especially in this country, which, under democracy, has such a long and heartening record of expanding privilege and opportunity for so many?¹⁴⁵”. In such a domain, the conservative paradigm retained hegemony, being the only politically-admissible and ideologically-feasible explanation, for how could any rational individual choose communism after experiencing the near-utopian benefits and freedoms of consumerist capitalist democracy?¹⁴⁶ Thus, in continuity with 19th century wisdoms, domestic ideology popularisation continued to be understood as resulting from conspiratorial, subversive agents preying upon the vulnerable/gullible/morally-weak/lazy/deviant to dupe them into becoming

¹⁴⁴ This thought trend I discuss in detail in Chapter 2 as the ‘counterinsurgent’ iteration of the *progressive* paradigm of IV.

¹⁴⁵ J. Edgar Hoover, *Masters of Deceit: The story of communism in America and how to fight it* (Auckland: Pickle Partners Publishing, 2015 [1958]) [Kindle], 106.

¹⁴⁶ *Ibid.*

footsoldiers for the communist totalitarian project¹⁴⁷. Various sub-paradigms proliferated elaborating on this foundational assumption:

- 1) *'Vulnerability' profiles*: claimed to identify certain character types deemed peculiarly 'vulnerable' to *ideological persuasion* – a behavioural scientific approach¹⁴⁸ that elaborated and updated greatly the more primitive 'vulnerability' profiles of previous iterations (e.g., the uneducated gullibility of post-revolutionary reactionism; the moral weakness/laziness of bourgeois anti-socialism, etc.). This was championed by Hoover, who outlined a host of characteristics he deemed vulnerable to *ideological persuasion*, including those suffering from “loss of faith [...] [the] idealistic [...] curiosity- and adventure-seekers, opportunists, disgruntled misfits, and power-hungry personalities [...] [those who] wanted social companionship [...] [and] belongingness [...] the egotistical [...] twisted, mixed-up neurotics [...] [those] angry at society [...] [and the] intellectual but lonely”¹⁴⁹. Such ideological converts, Hoover proclaimed, were manipulated “dupes” spanning from “innocent, gullible, [to] willful [sic] allies”¹⁵⁰ of communist agents who had infiltrated their organisations or individually targeted

¹⁴⁷ Berlet and Lyons assert that, beginning during the industrial unrest of late 1800s America and solidifying during the Cold War, *countersubversion theory* – characterised by the belief that “all dissident social movements [arose] not from any real social or economic conditions, but as the creation of outside agitators” – become an orthodoxy for state agencies lobbied by corporate elites and private security firms (Chip Berlet and Matthew N. Lyons, “Repression and Ideology: the legacy of discredited centrist/extremist theory,” *Political Research Associates* (Nov., 1998), 4). By the Cold War, Goldberg asserts, this theory had become a ‘staple’ of the Republican Party (Goldberg, *Enemies Within*, 28), reified by the popular press and bestselling books (Cyndy Hendershot, *Anti-Communism and popular culture in mid-century America* (Jefferson, NC: McFarland & Company, Inc., Publishers, 2003), 109).

¹⁴⁸ Many of these works were published as a compilation: Daniel Bell (ed.) *The Radical Right*, expanded and updated (New York: Doubleday & Company, Inc., 1963). Also highly influential was Theodor Adorno, et al., *The Authoritarian Personality* (London: Verso, 2019 [1950]). In a critical review of this school of thought, Berlet and Lyons summarise its ethos as viewing “dissident movements of the left and right as composed of outsiders - politically marginal people [...] Social and economic stress snaps these psychologically fragile people into a mode of political hysteria, and as they embrace an increasingly paranoid style they make militant and unreasonable demands. Because they are unstable they can become dangerous and violent. Their extremism places them far outside the legitimate political process, which is located in the center where pluralists conduct democratic debates. [...] The center was a realm of political civility, pragmatism, rationality, and tolerance. The extremes were the opposite of all this: absolutist, moralistic, unrestrained, irrational, and paranoid.” - Berlet and Lyons, “Repression and Ideology,” 8-9.

¹⁴⁹ Hoover, *Masters of Deceit*, 107-113 & 333-334.

¹⁵⁰ J. Edgar Hoover, “Speech before the House Committee on Un-American Activities,” dated March 26 1947. Accessed December 5 2019. Available at: <http://voicesofdemocracy.umd.edu/hover-speech-before-the-house-committee-speech-text/>

them for manipulation¹⁵¹. More broadly, this behaviouralist trend proposed as vulnerable those with “primitive id impulses ... mental patient status ... deviance ... maladjustment ... anxiety ... intolerance of ambiguity ... inflexibility ... desire for certainty ... ethnocentrism, authoritarianism ... rigidity ... and dogmatism¹⁵²”. This approach was institutionalised under the FBI’s 1959 formalisation¹⁵³ of the ‘extremism’ construct¹⁵⁴ which attributed all political activity on either ‘extreme’ of the political spectrum to irrational projection of internal, psychological maladjustment promotive of “absolutist, moralistic, unrestrained, irrational, and paranoid” thinking¹⁵⁵. The most famous of the works in this genre - Hoffer’s *The True Believer*¹⁵⁶ – was endorsed and promoted by Presidents Eisenhower, Johnson, and Raegan¹⁵⁷.

- 2) *‘Brainwashing’ theory*: if ‘vulnerability’ profiles helped identify who was ‘naturally vulnerable’ to *ideological persuasion*, brainwashing theory was proposed as an explanation as to how recruiters could render ordinarily resilient individuals vulnerable. Specifically, its progenitor, Hunter¹⁵⁸, sought to understand how US soldiers captured during the Korean War returned from Chinese captivity espousing communist views. His problematisation, echoing Hoover, was exemplary of the conservative paradigm, remarking: “Never before had the citizens of a rich, ripe land such as the United States, beneficiaries of the highest

¹⁵¹ Hoover and others outlined both soviet infiltration of civil society and other organisations as well as personal ‘befriending’ of perceived vulnerable individuals for manipulation as key methodologies through which Soviet agents spread their deceptions. See: Hoover, “Speech before the House Committee”; and Hoover, *Masters of Deceit*, 113 & 190-213.

¹⁵² D. O’Donovan, “Rating Extremity: Pathology or meaningfulness?” *Psychological Review* 72 (1965), 358 (paraphrased by S. Alexander Haslam and John C. Turner, “Extremism and Deviance: Beyond Taxonomy and Bias,” *Social Research* 65(2) (Summer 1998), 438).

¹⁵³ Donner, *The Age of Surveillance*, 5.

¹⁵⁴ Further discussed below.

¹⁵⁵ Berlet and Lyons, “Repression and Ideology,” 9; Ron Robin, *The Making of the Cold War Enemy: Culture and Politics in the Military-Intellectual Complex* (Princeton: Princeton University Press, 2001), 130.

¹⁵⁶ Eric Hoffer, *The True Believer: Thoughts on the nature of mass movements* (New York: Harper Perennial, 2010 [1951]). Hoffer’s book – which continues to be influential to this day - is most well-known for its assertion that “faith in a holy cause is to a considerable extent a substitute for the lost faith in ourselves (p. 14) [...] all mass movements [...] appeal to the same types of mind (p. 17) [...] the inferior elements [...] [who] see their lives and the present as spoiled beyond remedy and [so] are ready to waste and wreck both (p. 24) [...] [ideologies/movements attract] misfits (p. 47) [...] the inordinately selfish (p. 48) [...] the bored (p. 51) ...”.

¹⁵⁷ Jonah S. Rubin, *A Macat Analysis: Eric Hoffer’s The True Believer: Thoughts on the nature of mass movements* (London: Macat International Ltd., 2017), 43-49.

¹⁵⁸ Edward Hunter, *Brainwashing: the story of the men who defied it* (Auckland, NZ: Pickle Partners Publishing, 2016 [1956]) [Kindle]

standard of living that the earth had ever seen, adopted to stay in an extremely backward, dreadfully impoverished country, supposedly out of preference for its way of life¹⁵⁹. His proposed explanation was that communist recruiters had devised an “atrocious quack science [...] to bring about the voluntary submission of people to an unthinking discipline [...]”¹⁶⁰ [rendering the individual] a living puppet [...] with new beliefs and new thought processes inserted into a captive body¹⁶¹. This was achieved, he argued, through “a perverted Pavlovian technique¹⁶² [...] under hideous pressures of the mind¹⁶³”. Hunter also further reified the notion that, because *ideological persuasion* is fundamentally a process of manipulation, it loses all power once the victim understands they are being manipulated¹⁶⁴.

- 3) *Structural functionalism*: Recalling the bourgeois anti-socialist narratives of the immorality/laziness of revolting against a meritocratic system – and reified during the period of 1940s/50s US post-war consensus - this sub-paradigm assumed the inherent harmony, rationality, and self-regulating stability of the US capitalist liberal democratic establishment ideology, from which it was deduced that agitation against it could only emanate from ‘deviant’ individuals acting irrationally and against their better interests of integration within that society¹⁶⁵.
- 4) *‘Riff-raff’ theory*: implicitly recalling 19th century criminal psychology, it was proposed that anti-establishment agitation attracted, or resulted

¹⁵⁹ Ibid, location 226.

¹⁶⁰ Ibid, location 109.

¹⁶¹ Ibid, location 4941.

¹⁶² Ibid, location 4936.

¹⁶³ Ibid, location 279.

¹⁶⁴ Hunter asserts that “To be successful, brainwashing depended fundamentally on the subject’s ignorance of it. When understood, the worst that the Red laboratories could produce could be thwarted by the character of the free man. When the techniques of communist brainwashing become common knowledge the system will be either shattered completely or made so difficult and costly to the Reds that the game will be hardly worth the candle” (Ibid, location 293). Later, he writes that it is “the responsibility of free society is to let all the people in the world know these facts, at home and abroad and on both sides of the bamboo-iron curtain. The Reds have been proven deliberate and consistent liars by their own mouths. When people realize this simple fact, [...] the confession trick will be deprived of all its propaganda value to the Reds. People everywhere will sensibly meet every Red pronouncement of a new confession with a horse laugh” (Ibid, location 4898).

¹⁶⁵ R. Ball, “Violent Urban Disturbance in England 1980-81,” PhD Diss., *University of the West of England, Bristol*, 2012, 57-61; David Waddington and Mike King, “The Disorderly Crowd: From Classical Psychological Reductionism to Socio-Contextual Theory – The Impact on Public Order Policing Strategies,” *The Howard Journal* 44(5) (Dec., 2005), 429.

from, congregations of “deviant, transient or criminal-minded sections of society with predilections for anti-social or violent behaviour¹⁶⁶”.

Thus, there emerged a dichotomy, whereby domestic IV was seen to result from microscopic, individual maladjustment (*à la* conservative paradigm), while non-domestic IV resulted from macroscopic, structural maladjustment (*à la* progressive paradigm)¹⁶⁷.

These conservative sub-paradigms provided the foundation for the *Second Red Scare* of the 1950s and subsequent repression of dissidents; from the civil rights movement of the 1960s to the *New Left* terrorism of the 1970s-80s, all of whose activities were commonly attributed to *ideological persuasion* by subversive Soviet front groups¹⁶⁸. In particular, the 1970s/80s terror threat was pathologized in contemporary academic literature (either as psychopathy or according to the ‘vulnerability’ profiles noted above)¹⁶⁹ while, directly recalling

¹⁶⁶ Waddington and King, “The Disorderly Crowd,” 493.

¹⁶⁷ This dichotomy will become clearer in the next chapter.

¹⁶⁸ This thinking is exemplified in a 1956 address by the *Honorable Herbert Brownell, Jr., Attorney General of the United States*, in which he outlined an alleged global communist conspiracy, directed from Moscow, whose agents insinuated themselves into all manner of institutions and civil society organisations across the world to “attract a membership which can be unwittingly exploited [...] [with each front group having] a theme designed to attract a particular target group.” (“The subversive effects of international communism,” *Address by Honorable Herbert Brownell, Jr., Attorney General of the United States, prepared for delivery before the Inter-American Bar Association Conference, Dallas, Texas (April 17 1956)*. Available at: <https://www.justice.gov/sites/default/files/ag/legacy/2011/09/12/04-17-1956.pdf>). These fears were formalised in the 1950 US *Internal Security Act*, which asserted that “there exists a world communist movement [...] whose purpose it is, by treachery, deceit, infiltration and other groups, espionage, sabotage, terrorism, and any other means deemed necessary, to establish a communist totalitarian dictatorship in the countries throughout the world ...” (Donner, *The Age of Surveillance*, 11). By 1975, the FBI had listed 1,100 such organisations as suspected “communist infiltrated, communist dominated, communist fronts.” (Ibid, 5). See also: Gilda Zwerman, “Domestic Counterterrorism: U.S. Government Responses to Political Violence on the Left in the Reagan Era,” *Social Justice* 16(2) (Summer, 1989): pp. 31-63; Aaron Winter, “The United States of America: Counter-terrorism pre-9/11,” in *Routledge handbook of terrorism and counterterrorism*, ed. Andrew Silke (Oxon: Routledge, 2018), 625; Federico Romero, “Cold War Anti-Communism and the impact of Communism on the West,” in *The Cambridge History of Communism: Vol. II: The Socialist Camp and World Power 1941-1960s*, eds. Norman Naimark, Silvio Pons and Sophie Quinn-Judge (Cambridge: Cambridge University Press, 2017), 292-294 & 307; Phillip Deery, “American Communism,” in *The Cambridge History of Communism: Vol. II: The Socialist Camp and World Power 1941-1960s*, eds. Norman Naimark, Silvio Pons and Sophie Quinn-Judge (Cambridge: Cambridge University Press, 2017), 654-659; Rod Bush, “The Civil Rights Movement and the Continuing Struggle for the Redemption of America,” *Social Justice* 30(1) (2003): pp. 42-66.

¹⁶⁹ This ranged from simplistic diagnoses of terrorists as psychopaths or sociopaths to more sophisticated theorising about the prevalence of narcissism, Freudian maladjustment, etc. (See critical articles by: Andrew Silke, “Cheshire-cat logic: The recurring theme of terrorist abnormality in psychological research,” *Psychology, Crime and Law* 4(1) (1998), 55; Bradley McAllister and Alex P. Schmid, “Theories of Terrorism,” in *The Routledge Handbook of Terrorism Research*, ed. Alex P. Schmid (London: Routledge, 2011), 215; Martha Crenshaw, “The Psychology of Terrorism: An Agenda for the 21st Century,” *Political Psychology* 21(2) (Jun., 2000), 405-407;

post-French Revolutionary reactionism's conspiracy theories, President Raegan – aided by a number of academically-marginalised but politically well-platformed academics (and in defiance of his own CIA advisers) – asserted that all international terrorism was being fomented, funded, and directed by Soviet agents, who exploited these maladjusted 'useful idiots' for their own ends¹⁷⁰.

These conventional wisdoms reproduced the conservative paradigm remedial repertoires that preceded them, based upon rooting out subversive elements¹⁷¹; punishing perpetrators through retaliatory strikes¹⁷² (for such 'irrational' actors could not be reasoned with; only understanding force); and discrediting communist propaganda - chiefly by portraying communism as a totalitarian evil akin to fascism¹⁷³, by revealing the falsity of Soviet pretensions to utopia¹⁷⁴, and by educating people into the methods by which communists sought to 'brainwash' them so that they might fortify themselves against it¹⁷⁵. This

Jeff Victoroff, "The Mind of the Terrorist: A review and critique of Psychological approaches," *Journal of Conflict Resolution* 49(1) (Feb., 2005), 9-23). This pathologisation of terrorism generally resulted from what Silke famously called "Cheshire Cat logic," the attribution error whereby "we cannot believe normal people could commit terrorist acts, so we look for abnormality" (Silke, "Cheshire-cat logic," 67).

¹⁷⁰ Raegan was particularly influenced by an academically-controversial but best-selling 1981 study, *The Terror Network* by Claire Sterling, which claimed that the Soviet Union was the directing force behind all leftist terrorism across the globe. Even before this however, the US tended to understand terrorism as an inextricably state-funded/directed endeavour, and in 1979, Congress developed a blacklist of state-sponsors of terrorism, including Libya, Iraq, Syria, South Yemen (to which were later added Afghanistan, Cuba, North Korea, Sudan and Iran). See: Winter, "The United States of America," 626; Zwermer, "Domestic Counterterrorism," 35; Bruce Hoffman, "Current research on terrorism and low-intensity conflict," *Studies in Conflict & Terrorism* 15(1) (1992), 25; Lisa Stampnitzky, *Disciplining Terror: How Experts Invented 'Terrorism'* (Cambridge: Cambridge University Press, 2013), 109-117; Marc Sageman, "Countering Extremist Violence," in *Countering Violent Extremism: Scientific Methods & Strategies*, ed. Laurie Fenstermacher (Topical Strategic multi-layer assessment and air force research laboratory multi-disciplinary white paper in support of counter-terrorism and counter-WMD, 2011). Available at: <https://info.publicintelligence.net/ARL-CounteringViolentExtremism.pdf>, 29.

¹⁷¹ Both through the overt Congressional 'loyalty boards' which investigated government employees (3 million during the second Red Scare) to root out Communist sympathisers (Deery, "American Communism," 655) and covert infiltration of suspected Communist front and terrorist groups, such as by the FBI's COINTELPRO programme (Winter, "The United States of America," 624).

¹⁷² This was particularly the case when it came to international terrorism, with Reagan formalising such a policy of "active defense" in his National Security Directive 138 – see: Stampnitzky, *Disciplining Terror*, 110-111.

¹⁷³ Robert L. Ivie, "Speaking 'common sense'; about the Soviet threat: Reagan's rhetorical stance," *Western Journal of Communication* 48(1) (1984): pp. 39-50; Robert L. Ivie, "Fire, Flood, and Red Fever: Motivating Metaphors of Global Emergency in the Truman Doctrine Speech," *Presidential Studies Quarterly* 29(3) (Sep., 1999), 574; Romero, "Cold War Anti-Communism," 291-304.

¹⁷⁴ Romero, "Cold War Anti-Communism," 291-304; Nicholas K. Cull and B. Theo Mazumdar, "Propaganda and the Cold War," in *The Routledge Handbook of the Cold War*, ed. Artemy M. Kalinovsky (Oxon: Routledge, 2014), 327.

¹⁷⁵ Hunter argued that the success of 'brainwashing' depended on the victim not realising they were people brainwashed, and considered the spread of information on brainwashing and

continued conviction in the self-evident and unrivalled virtues of the establishment ideology (and the thus inherent irrationality and inferiority of all alternatives) led thinkers like Hoover to conclude that “Victory will be assured once communists are identified and exposed because the public will take the first step of quarantining them”¹⁷⁶. Otherwise stated: the assumption that ideologies only popularise by manipulation meant that they would automatically be rejected once people realised they were being manipulated.

1.2.6. The ‘Green Peril’ and the early GWOT, c. 1991-2004:

The Cold War’s end spurred a new conservative paradigm iteration as the dominant IV imaginary shifted from domestic communism towards non-domestic and, later, domestic, Islamism¹⁷⁷. The distinction between *conservative* and *progressive* paradigms blurred during this time because, while non-domestic Islamist IV could be comfortably attributed to grievances in the affected locales (particularly poverty and autocracy)¹⁷⁸ - à la *progressive* paradigm – much like

brainwashing techniques to be a form of “mental vaccination”. See: Hunter, *Brainwashing*, Locations 293, 4898, & 4963.

¹⁷⁶ Ibid.

¹⁷⁷ Concerns of Islamist IV first began to mount in the immediate aftermath of the 1979 *Iranian Revolution* and the string of subsequent regional acts of Islamist IV seemingly inspired or energised by it (notably the siege of the Grand Mosque in Mecca (1979); attacks on US embassies in Pakistan, Libya, Kuwait and Afghanistan (1979); the assassination of Egyptian President Anwar Sadat by Islamist militants (1981); *Hezbollah’s* attacks on US peacekeepers in Beirut (1982); the *Rushdie Affair* (1988); and the gradual supplanting of the secular *Fatah* by the Islamist *Hamas* in the Occupied Palestinian Territories (beginning 1987), etc.) (John L. Esposito, “Political Islam and U.S. Foreign Policy,” *The Brown Journal of Foreign Affairs* 1(1) (Winter, 1993-1994), 63-69; Fawaz A. Gerges, *America and Political Islam: Clash of cultures or clash of interests?* (New York: Cambridge University Press, 1999), 41-44, 62-66; Stampnitzky, *Disciplining Terror*, 141-142). However, for as long as the Cold War continued, the Soviet Union remained the key point of concern for Western policymakers, and militant Islamism was broadly comprehended with a degree of opportunism, it being considered a malleable impulse ripe of deployment against the atheistic Soviet Union. Such a logic culminated in the US support for the Afghan *mujahideen* and their Arab allies throughout the *Soviet-Afghan War* (1979-1989) (Douglas Little, *Us versus Them: The United States, Radical Islam, and the Rise of the Green Threat* (Chapel Hill: The University of North Carolina Press, 2016), 17; Gerges, *America and Political Islam*, 60, 68, 72). With the end of the Cold War, the threat of Islamist IV began to be assessed upon its own merit (Ibid, 13), while several US Cold-War-era allies – notably Egypt, Saudi Arabia, Israel, Turkey, Pakistan, India – deliberately sought to inflate that threat perception so as to ensure continued US support now the old Soviet enemy had dissipated (Leon T. Hadar, “What Green Peril?”, *Foreign Affairs* 72(2) (Spring, 1993); Esposito, “Political Islam and U.S. Foreign Policy,” 73).

¹⁷⁸ In an 1995 article, an exasperated Daniel Pipes – a leading exponent of several *conservative* sub-paradigms on Islamist IV outlined below – complained that it had “become a virtual article of faith that poverty has caused the surge in fundamentalist Islam”, before listing a slew of key political figures who upheld such a view, including Israeli *Foreign Minister* Shimon Peres, French former *Interior Minister* Charles Pasqua, *US Ambassador to Israeli* Martin Indyk, etc. (Daniel Pipes, “It’s not the economy, stupid: What the West needs to know about the rise of Radical Islam,” originally published by *The Washington Post*, dated July 2 1995. Now Available at *Middle East Forum*. Accessed August 1 2020. Available at: <https://www.meforum.org/3894/its-not-the-economy-stupid>). More definitively, the Clinton administration championed the causal narrative

non-domestic communism in the immediate post-Second World War period¹⁷⁹, their anti-US animus could not be so comfortably explained. Such anti-Americanism, manifested in escalating Islamist attacks against US interests, baffled an American people imbued with the same belief in American exceptionalism¹⁸⁰ that had enabled politicians to depict socialism/communism as irrational within the utopian American context and, moreover, the recent vindication of that apparent exceptionalism (and of the unparalleled virtues of the establishment ideology upon which it rested) resulting from victory in the Cold War and the 'end of history' it was briefly believed to have ushered in¹⁸¹. Echoing Hoover and Hunter, the mystery of Islamist anti-Americanism was problematised with a definitively establishment-normative bent: as Mishra summarises, "How could, it was felt, people be so opposed to modernity, and all the many goods it had to offer to people around the world: equality, liberty, prosperity, toleration, pluralism, and representative government?"¹⁸².

After thorough yet superficial attempts to discredit the grievances cited by Islamist militants against the US¹⁸³, various conservative-leaning scholars,

that "the roots of extremism and terror" were to be found in "economic stagnation and poverty," not religion (Clinton's *Secretary of State Warren Christopher*, quoted in Little, *Us versus Them*, 122) and that "[I]f poverty persists in breeding despair and killing hope then the purveyors of fear will find fertile ground [to] stoke the fires of violence." (Clinton quoted in Gerges, *America and Political Islam*, 107).

¹⁷⁹ Indeed, there are distinct parallels between the Clinton administration's framing of the militant Islamist threat (see previous footnote) and Truman's 1947 assertion that communism in post-war Europe was "nurtured by misery and want [and] spread and grow in the evil soil of poverty and strife" ("Truman Doctrine," *President Harry S. Truman's Address before a Joint Session of Congress*, dated March 12 1947. Accessed December 4 2019. Available at: https://avalon.law.yale.edu/20th_century/trudoc.asp; see Chapter 2).

¹⁸⁰ Patrick and Forman describe the sentiment at this time as "a pervasive faith in the uniqueness, immutability, and superiority of the country's founding liberal principles" (Stewart Patrick and Shepard Forman, *Multilateralism and US Foreign Policy: Ambivalent Engagement* (Boulder, CO: Lynne Rienner, 2002), 7). Burke recalls this dynamic in President Bush' personal responses to 9/11, noting how Bush' rhetoric was "soaked in the sense of American exceptionalism, the manifest destiny, two centuries of American belief in its own role in the world as a beacon of enlightenment and progress, the sense of existential battle between freedom and repression." See: Jason Burke, *The 9/11 Wars* (London: Penguin Books, 2011), 45.

¹⁸¹ Francis Fukuyama's famous 1989 essay "The End of History?" summed up the sense of teleological vindication felt by the US with the conclusion of the Cold War. He writes: "The triumph of the West, of the Western idea, is evident first of all in the total exhaustion of viable systematic alternatives to Western liberalism [...] What we may be witnessing is not just the end of the Cold War, or the passing of a particular period of postwar history, but the end of history as such: that is, the end point of mankind's ideological evolution and the universalization of Western liberal democracy as the final form of human government." See: Francis Fukuyama, "The End of History?" *The National Interest* 16 (Summer, 1989), 3-4.

¹⁸² Pankaj Mishra, *Age of Anger: A History of the Present* (London: Penguin Books Ltd., 2017). [Kindle], 125

¹⁸³ Such refutations typically took the form of ultra-macro falsifying observations which crucially failed to consider complex and compound causation, nor the lingering distrusts and resentments left by past transgressions long after their formal cessation. They often also appear sophistic,

policymakers, and pundits attempted to propose explanations as to why militant Islamists had *really* turned their ire towards the US/West. Many of the sub-paradigms that proliferated emphasised conservative paradigm-style dynamics – often to the point of erasing the previously acknowledged extant grievances – suggesting variously:

- 1) *The ‘clash of civilisations’ sub-paradigm*¹⁸⁴: Islam is primordially and immutably hostile to the Christian/post-Christian West, which Muslims have long recognised as a religious rival whose successes cause them existential anxiety as they attempt to reconcile the realities of Christian power with their belief that God bestows material power upon His favoured community¹⁸⁵. Islamist anti-Americanism thus constitutes a simple continuation of 1,400 years of back-and-forth conflict between the two civilisations¹⁸⁶; one based on theological/ideological insecurity, divorced from contemporary contexts¹⁸⁷.
- 2) *The ‘anti-liberal’ sub-paradigm*: Islam is inherently inimical to the liberal norms embodied by the US/West, provoking hostility, chauvinism, and revulsion towards it, alongside fanatical and authoritarian impulses against attempts to cultivate those norms in Muslim lands¹⁸⁸.

cherry picking observations to serve a establishment-normative agenda. To give a few prominent examples: 1) If poverty and/or envy of US wealth is to blame, then why is it that only the Muslim world is responding violently while other equally or more impoverished regions are not? (Fareed Zakaria, “The politics of rage: why do they hate us?” *Newsweek*, dated October 14 2001. Accessed November 19 2019. Available at: <https://www.newsweek.com/politics-rage-why-do-they-hate-us-154345>); why do only a small number of poor Muslims revolt while many more do not? (Pipes, “It’s not the economy, stupid.”); why are they only revolting now when poverty is hardly new to the region? (Ibid); why are so many Islamist militants from wealthy backgrounds? (Ibid); 2) If imperialism is the problem, why does the US – who, other than a brief stint in the Philippines, has never directly colonised Muslim territories - receive more hate than the British and French (who directly occupied Muslim lands) or Russia who still occupy Muslim lands in central Asia? (Bernard Lewis, “The Roots of Muslim Rage,” *The Atlantic*, dated September 1990. Accessed November 19 2019. Available at: <https://www.theatlantic.com/magazine/archive/1990/09/the-roots-of-muslim-rage/304643/>); 3) If US support of Israel is the problem, why is there not equal hatred towards the Soviet Union which was the first country to support Israel? (Lewis, “The Roots of Muslim Rage.”); etc.

¹⁸⁴ This term was coined in Bernard’s Lewis famous 1990 article “the Roots of Muslim Rage (Ibid) and popularised in Samuel Huntington’s 1993 article: Samuel P. Huntington, “The Clash of Civilizations?” *Foreign Affairs* 72(3) (Summer, 1993).

¹⁸⁵ Lewis, “The Roots of Muslim Rage.”. Ruthven built on Lewis’ argument, directly or non-directly, through her concept of the “‘argument from Manifest Success’ in which the early conquests of Islam are seen as demonstrations of God’s approval, even proofs of His existence, the scandal of Western post-enlightenment success may be unbearable” (Malise Ruthven, *A Fury for God: The Islamist attack on America* (London: Granta Books, 2004 [2002]), 125).

¹⁸⁶ Lewis, “The Roots of Muslim Rage.”; Huntington, “The Clash of Civilizations?”.

¹⁸⁷ See critical discussion in Erdoan A. Shipoli, *Islam, Securitization, and US Foreign Policy* (Cham, Switzerland: Palgrave Macmillan, 2018), 135.

¹⁸⁸ For Lewis, the Islamic ethos on legitimate authority belonging to God alone rendered it inimical to Western Enlightenment notions of popular sovereignty, a property he asserts to be directly

- 3) *The 'Islamic imperialism' sub-paradigm*: Islam promotes a militant us-vs-them mindset that pits the 'Abode of Islam' in perpetual conflict with the 'Abode of War'¹⁸⁹. Militant Islamism manifests this impulse and will attack anyone who stands in the way of world domination¹⁹⁰.
- 4) *The 'political scapegoating' sub-paradigm*: Autocratic regimes in Muslim/Arab countries deliberately foment anti-American and anti-Israeli sentiments among their subjects as a means of deflecting blame away from their own corruption, failings, and inadequacies¹⁹¹.
- 5) *The 'cultural scapegoating' sub-paradigm*: a peculiarity of Arab culture is a "proclivity to blaming others for his own shortcomings and failure. Since the West is the most readily available scapegoat, it must take most of the blame, with that goes inevitably most of the hate¹⁹²".

responsible for the fact that the history of the Islamic states is one of almost unrelieved autocracy (Bernard Lewis, "Islam and Liberal Democracy," *The Atlantic* (February 1993 Issue). Accessed 29 July 2020. Available at: <https://www.theatlantic.com/magazine/archive/1993/02/islam-and-liberal-democracy/308509/>). In a complementary argument, Pipes asserts that the unique prominence of "regulations about public life and relations with non-believers" within Islam render the religion "quite at variance with modern sensibilities [...] a fact that itself goes far to explain the attraction of militant Islamic ideology" (Daniel Pipes, "Who is the enemy," *Middle East Forum*, dated January 2002. Accessed August 1 2020. Available at: <https://www.meforum.org/4056/who-is-the-enemy>). A highly influential 2004 report by Cheryl Benard went further to claim that Islam's inflexible attitude to religious scripture rendered the faith "antithetical to the basic requirements of a modern democratic mind-set: critical thinking, creative problem solving, individual liberty, secularism" (Cheryl Benard, *Civil Democratic Islam: Partners, resources, and strategies* (Santa Monica, CA: RAND Corporation 2004), 33). Absent these essential democratic values, such scholars asserted, Islam was prone to intolerance, anti-democratic and authoritarian tendencies and terrorism (see critique by Louay Safi, "Blaming Islam: Examining the religion building enterprise," *Institute for Social Policy and Understanding* (2006). Available at: <https://www.ispu.org/wp-content/uploads/2016/08/randreportjustifiedrevised.pdf?x45480>, 2).

¹⁸⁹ Thus warned Bernard Lewis, discussed critically in Little, *Us versus Them*, 86.

¹⁹⁰ Pipes made this point particularly explicitly, asserting that "Jihad is [...] unabashedly offensive in nature, with the eventual goal of achieving Muslim domination over the entire globe" (Daniel Pipes, "What is Jihad?" originally published by *The New York Post*, dated December 31 2002. Now Available at *Middle East Forum*. Accessed August 1 2020. Available at: <https://www.meforum.org/4132/what-is-jihad>). In an earlier article, he had explained the Islamists animus towards the US in pure real power terms: "they viscerally hate the United States [...] [because of] challenge all they represent, and the U.S. stands as the single greatest obstacle to fulfilling their vision" (Daniel Pipes, "[Terrorism:] The New Enemy," originally published by *The Wall Street Journal Europe*, dated August 27 1998. Now Available at *Middle East Forum*. Accessed August 1 2020. Available at: <https://www.meforum.org/3927/terrorism-the-new-enemy>).

¹⁹¹ See for example: Zakaria, "The politics of rage,;" and Bernard Lewis, "What Went Wrong?" *The Atlantic* (Jan. 2002 Issue). Accessed July 29 2020. Available at: <https://www.theatlantic.com/magazine/archive/2002/01/what-went-wrong/302387/>

¹⁹² Raphael Patai, in his highly influential book, *The Arab Mind* (Raphael Patai, *The Arab Mind* (New York: Scribner, 1973)) which, as we shall see in Chapter 3, became immensely influential in US military circles following 9/11 (quoted critically in Dag Tuastad, "Neo-Orientalism and the New Barbarism Thesis: Aspects of Symbolic Violence in the Middle East Conflict(s)," *Third World Quarterly* 24(4) (Aug., 2003), 591).

6) *The 'exporting extremism/Islamic civil war' sub-paradigm*: Saudi Arabia uses its petro-dollars to export its 'extremist' interpretation of Islam through global networks of mosques, publishing houses, and madrassas. These institutions indoctrinate Muslims with 'extremist' views and hatred of the West, while marginalising 'moderate' interpretations of Islam¹⁹³. Similar antics were suspected of revolutionary Iran, which was accused of directing an international 'Islamitern' (analogous to the Soviet *Comintern* of the Cold War) through which it spread its 'extremist' anti-Americanism and sponsored terrorist proxies¹⁹⁴. Finally, some autocratic regimes paid lip service to Islamist sentiments as a means of cultivating constituencies loyal to their regimes¹⁹⁵. This exporting of 'extremist' interpretations of Islam had set in motion an ideological/doctrinal 'civil war within Islam', pitting a vocal minority of violent, hateful, and totalitarian 'extremists' against a quiet majority of liberal, peace-loving, and democracy-yearning 'moderates'¹⁹⁶.

¹⁹³ Zakaria, "The politics of rage,,"; Bernard Lewis, "Rethinking the Middle East," *Foreign Affairs* 71(4) (Fall, 1992); "Terrorism in the Horn of Africa," *United States Institute of Peace* 113 (Jan., 2004), 16; "Terrorism: Growing Wahhabi influence in the United States," *Hearing before the Subcommittee on Terrorism, Technology and Homeland Security of the Committee on the Judiciary, United States Senate, one hundred eight congress, first session* (June 26 2003). Available at: <https://www.govinfo.gov/content/pkg/CHRG-108shrg91326/pdf/CHRG-108shrg91326.pdf>, 15-18; Matthew Levitt, "Subversion from Within: Saudi Funding of Islamic Extremist Groups in the United States," *Washington Institute for Near East Policy*, dated October 2 2003. Accessed August 2 2020. Available at: <https://www.washingtoninstitute.org/policy-analysis/view/subversion-from-within-saudi-funding-of-islamic-extremist-groups-in-the-uni>;

"Terrorism Financing: Origination, Organization, and Prevention: Saudi Arabia, Terrorist Financing and the War on Terror," *Testimony of Steven Emerson with Jonathan Levin Before the United States Senate Committee on Governmental Affairs* (July 31st, 2003). Available at: <https://www.hsgac.senate.gov/imo/media/doc/073103emerson.pdf>, 3. See also critical discussions in: Lockman, *Contending Visions*, 225 (referencing Daniel Pipes); and F. Gregory Gause III, "Saudi Arabia and the War on Terrorism," in *A Practical Guide to Winning the War on Terrorism*, ed. Adam Garfinkle (London: Hoover Institution Press, 2004), 90.

¹⁹⁴ Lewis, "Rethinking the Middle East". See critical discussions in Hadar, "What Green Peril?"; Gerges, *America and Political Islam*, 25 (referencing Charles Krauthammer, Daniel Pipes, and Martin Kramer); and Little, *Us versus Them*, 87 & 110.

¹⁹⁵ Zakaria, "The politics of rage"; Lewis, "Islam and Liberal Democracy".

¹⁹⁶ Writing shortly after 9/11, Daniel Pipes defined the Islamist IV threat "not [as a clash] between two civilizations, [...] [but] a clash among the members of *one* civilization - specifically, between Islamists and those who, for want of a better term, we may call moderate Muslims" (Pipes, "Who is the enemy"). Writing around the same time, Michael Scott Doran interpreted 9/11 as an attempt to sway the scales in the Islamic "civil war" by polarising the Muslim world between *al-Qaeda* and the US and its dictator allies (Michael Scott Doran, "Somebody else's Civil War," *Foreign Affairs* 81(1) (Jan./Feb., 2002). This sub-paradigm understood the Muslim world as being polarised between a minority of anti-democratic, anti-American 'extremists' and a majority of pro-democratic, America-loving 'moderates'; with the two sides being engaged in a battle for the soul of Islam: between rigid fundamentalism and humanistic modernism – see critical discussions by Kundnani, *The Muslims are coming!* Location 1247; and "Understanding Islamism," *International*

What these theories all held in common was the assumption that the US was, essentially, tragic collateral damage to Arab/Muslim cultural disfunction¹⁹⁷: Muslims were attacking the West because they were being *ideologically persuaded* that God commands it. Such grievance-negating narratives popularised almost unopposed following 9/11, as any acknowledgement of grievances risked denunciation as “an effort to excuse and justify the killing of innocent civilians¹⁹⁸”.

While *rhetorically* eschewing the more overtly Islamophobic/Arabophobic ‘clash of civilisations’, ‘anti-liberal’, ‘Islamic imperialist’ and ‘cultural scapegoating’ explanations for fear of alienating potential Muslim allies¹⁹⁹, the post-9/11 Bush Jnr. Administration drew upon all these sub-paradigms in varying measure, pulling them haphazardly together with other explanations drawn from the counterinsurgent iteration of the progressive paradigm²⁰⁰. This chaotic sense-making process resulted in part from the fact that different administration members adhered to different sub-paradigms and consulted different scholars, all of whose inputs were brought to the table to varying degrees²⁰¹. These ideas

Crisis Group 37 (Mar., 2005). Available at: <https://d2071andvip0wj.cloudfront.net/37-understanding-islamism.pdf>, 24.

¹⁹⁷ This was often stated explicitly. For example, Pipes asserted that, because Islamist IV is driven by an imperialist drive towards domination, “They hate Americans for who [an obstacle to Islamist world domination] they are, not for what they do; short of giving up the American way of life, the U.S. cannot please or appease them” (Pipes, “[Terrorism:] The New Enemy”). For Lewis and Doran, Islamist rage had fallen upon America purely because America was the clearest comparator for the failings of the Muslim world, hence provoking a resentful and jealous rage (Lewis, “The Roots of Muslim Rage”; Doran, “Somebody else’s Civil War,”). Finally, Ajami views the US as having been “caught in the crossfire” of an intra-Muslim civil war, with Islamists attacking the open and welcoming US because they had no luck attacking the closed and foreboding regimes in their own lands (Fouad Ajami, “Iraq and the Arab’s future,” *Foreign Affairs* 82(1) (Jan./Feb., 2003)). In his critical study of these thought trends, Lockman eloquently outlines the implications of such framing: “One might reasonably conclude from Lewis’s [and others’] analysis that there was really not much the United States or other Western powers could do to fix the problems of the Middle East or Muslim world, since they had had so little to do with creating them in the first place” (Lockman, *Contending Visions*, 251).

¹⁹⁸ Peter Neumann, “Perspectives on Radicalisation and Political Violence: Papers from the First International Conference on Radicalisation and Political Violence, London, January 17– 18, 2008 (London: International Centre for the Study of Radicalisation and Political Violence, 2008), 4. See also: Kundnani, *The Muslims are coming!*, location 2165; Maria Ryan, *Full Spectrum Dominance: Irregular Warfare and the War on Terror* (Stanford, CA: Stanford University Press, 2019), 33.

¹⁹⁹ Douglas J. Feith, *Inside the Pentagon at the Dawn of the War on Terrorism* (New York: Harper Collins, 2009), 13 & 50.

²⁰⁰ See Chapter 2.

²⁰¹ For example, it has been variously reported that Bernard Lewis, Fareed Zakaria and Fouad Ajami were frequently invited to advise the Bush administration following 9/11, coalescing into “the brain trust” for *Deputy Secretary of Defense* Paul Wolfowitz, occasionally joined by Daniel Pipes. Meanwhile, *Vice President* Dick Cheney developed a close professional friendship with Bernard Lewis, Wolfowitz and *Secretary of State* Condoleezza Rice with Fouad Ajami, while Rice herself reportedly favoured Zakaria’s work. See: Stephen Sheehi, *Islamophobia: The ideological campaign against Muslims* (Atlanta, GA: Clarity Press, Inc., 2011) [Kindle], 42-45, 56-67;

were then integrated within a traditional Cold War IV lens that envisioned Islamist 'terrorists' being nurtured and directed by sponsoring 'rogue' states just as left-wing terrorists had, allegedly, been directed by the Soviet Union during the Cold War²⁰². This uneasy eclecticism was somewhat inevitable from a government determined to conceptualise their mission as a GWOT, in that the geographical scope of each sub-paradigm was far from universalizable (e.g., no dictatorship in Hezbollah's homeland Lebanon; few madrassas in Iraq; etc.).

The confusion and inconsistencies wrought by this eclecticism become clear both in the way the administration conceptualised the Islamist IV-perpetrator enemy and in the strategic repertoire formulated to confront it. The Bush administration struggled to form an explicit and consistent 'imaginary' of the Islamist IV perpetrator subject (indeed, according to *Under Secretary of Defense for Policy* Feith, the very term GWOT was employed as a placeholder to allow such a task to be deferred²⁰³). The closest the administration came was in Bush' now (in)famous 2001 *State of the Union Address*, where he drew tropes from the various sub-paradigms to characterise the enemy as: "a collection of loosely affiliated terrorist organisations [...] [who have] perverted the peaceful teachings of Islam [...] [and whose] goal is remaking the world - and imposing its radical beliefs on people. [...] [their ideology] commands them to kill Christians and Jews, to kill all Americans. [...] They hate our freedoms [...] [and] make war against us because we stand in their way [of world domination], [just like] all the murderous ideologies of the 20th century [...] [:] fascism, and Nazism and totalitarianism²⁰⁴".

Muhammad Idrees Ahmad, *The Road to Iraq: The making of a Neoconservative War* (Edinburgh: Edinburgh University Press, 2014), 74; Muqtedar Khan, "Five American perspectives on Islam: an analytical guide," *Center for Global Policy* 1 (Jan., 2018). Available at: https://www.cgpolicy.org/wp-content/uploads/2018/02/Special_Report.pdf, 9; Deepa Kumar, *Islamophobia and the politics of Empire* (Chicago, IL: Haymarket Books, 2012) [Kindle], Location 2508; and Charles Kurzman, *The Missing Martyrs: Why are there so few Muslim Terrorists?*, 2nd ed., updated for the age of ISIS (New York: Oxford University Press, 2018), 140.

²⁰² The adoption of this Cold War lens appears to have occurred immediately and fairly uncritically. Little and Stampnitzky both note that Bush' administration was stacked with 'Cold Warriors' (Little, *Us versus Them*, 129; Stampnitzky, *Disciplining Terror*, 127), while then-*Under Secretary of Defense for Policy* Douglas Feith recalls how, immediately after 9/11, Claire Stirling's *The Terror Network*, previously favoured by Raegan for understanding allegedly-Soviet directed international terrorism, provided their primary frame of reference (Feith, *Inside the Pentagon*, 8).

²⁰³ Feith, *Inside the Pentagon*, 9.

²⁰⁴ "State of the Union Address: Text of George Bush's speech," *The Guardian*, dated September 21 2001. Accessed January 10 2020. Available at: <https://www.theguardian.com/world/2001/sep/21/september11.usa13/>. UK Prime Minister Tony Blair mirrored this picture of the Islamist IV imaginary as fanatics driven by hatred and chauvinism, declaring: "Our beliefs are the very opposite of the fanatics. We believe in reason, democracy and tolerance". See: "Full text of Blair's speech to the Commons," *The Guardian*, dated September 14 2001. Accessed January 10 2020. Available at: <https://www.theguardian.com/politics/2001/sep/14/houseofcommons.uk1>

Beyond this, the imaginary was fluid: being ever complicated by the differing sub-paradigms informing the administration's thinking at each point in time and space²⁰⁵.

In turn, this lack of clarity informed a catch-all remedial repertoire:

- 1) *À la* Cold War lens, state sponsors of Islamist 'terrorists' were to be deposed or intimidated into compliance²⁰⁶, while the weak/failed states in which such 'terrorist' groups found 'safe havens' to entrench and plan attacks against the West must be strengthened sufficiently to evict/suppress them²⁰⁷.
- 2) Next, *à la* the *political scapegoating sub-paradigm*, dictators fomenting anti-US hatred to deflect from their own failings needed to be deposed or pressured into reform and, for those deposed, liberal democratic governments established in their place; both to: 1) enable Muslim/Arab populations to experience the superiority of US/Western liberal democracy first hand (rather than perceive it through the distorted lens preached by the dictators and/or radical Mullahs)²⁰⁸ and 2) guide those countries towards successful modernisation, after their own attempts had failed, and instil the missing liberal democratic values necessary

²⁰⁵ For example, the 'exporting extremism' sub-paradigm envisioned the enemy as fanatical, ideologically-brainwashed madrassa students, while the 'civilisational humiliation' and 'political scapegoating' sub-paradigms envisioned a broader but more malleable enemy of Muslim societies poisoned against the West, modernity and democracy by the failures and lies of their rulers, who could be easily won over once they were able to experience the West's offerings authentically. Hence, the Bush administration could simultaneously worry about the endless trickle of extremists being produced by the madrassa 'terrorist factories' (Peter Bergen & Swati Pandey, "The madrassa scapegoat," *Washington Quarterly* 29(2) (2006), 117) whilst optimistically predicting wholesale gratitude and enthusiasm among Muslim populations liberated by US forces from despotism and gifted with democracy and freedom (Malcolm W. Nance, *The Terrorists of Iraq: Inside the Strategy and Tactics of the Iraq Insurgency 2003-2014*, 2nd ed. (Boca Raton: CRC Press, 2014), 4).

²⁰⁶ The September 2002 *National Security Strategy of the United States of America* spoke of "denying further sponsorship, support, and sanctuary to terrorists by convincing or compelling states to accept their sovereign responsibilities" ("The National Security Strategy of the United States of America, September 2002," *The White House* (Sep., 2002). Available at: <https://2009-2017.state.gov/documents/organization/63562.pdf>, 6).

²⁰⁷ According to Ryan, this was driven by the logic that "because bin Laden had thrived in Afghanistan, terrorists would thrive in other weak and failing states. If the symptoms of weak and failing states were being exploited by terrorists, the antidote was to stabilize those spaces". In addition to the broader state-building effort in Afghanistan, this was to be achieved through train-and-equip programmes for indigenous security services, with such programmes being established in the Philippines, Georgia and sub-Saharan Africa in 2002. See: Ryan, *Full Spectrum Dominance*, 35.

²⁰⁸ Steven Kettell, *New Labour and the new world order: Britain's role in the war on terror* (Manchester: Manchester University Press, 2011), 35-37.

to serve as an 'antidote to terrorism'²⁰⁹. Much like the establishment-normativity of the early non-domestic Cold War, it was confidently assumed that populations would naturally and gratefully embrace liberal democracy once given a chance to experience it authentically (and, by extension, any legitimate grievances would evaporate)²¹⁰.

- 3) Additionally, the US/West must engage in a 'war of ideas' against the ideology of Islamist 'terrorism'²¹¹. In practice, such initiatives spanned the range of sub-paradigms in their inspiration. On one hand, *à la* Cold War, *political scapegoating*, and *exporting extremism* sub-paradigm logics, there was a need to convey accurate representations of the US/Wests' establishment ideology to correct the distortions proliferated by the dictators and/or radical Mullahs²¹². On the other hand, there was a need to promote 'moderate' Islam (to help swing the 'Islamic civil war' in the right direction)²¹³ or even, most controversially, promote a 'reformation' of Islam so that its perceived inherently anti-democratic and chauvinistic traits might be extirpated (*à la Clash of Civilisations* and *anti-liberal* sub-paradigms)²¹⁴.

²⁰⁹ This notion was found in both the US *National Strategy for Combating Terrorism* 2003 (explored in Andrew T. H. Tan, *U.S. Strategy Against Global Terrorism: How It Evolved, Why It Failed, and Where It is Headed* (New York: Palgrave Macmillan, 2009), 120) and the 2004 *post facto* rationalisation given by UK PM Tony Blair for the invasion of Iraq ("Full text: Tony Blair's speech," *The Guardian*, dated March 5 2004. Accessed January 10 2020. Available at: <https://www.theguardian.com/politics/2004/mar/05/iraq.iraq>).

²¹⁰ Indeed, this logic informed the short-sighted preparations for the post-invasion occupation of Iraq. Expecting the Iraqis to gratefully embrace their newly-gifted democracy, there was no contemplation among planners of the possibility of facing a popular insurgency beyond isolated former-regime loyalists. See: Ali A. Allawi, *The Occupation of Iraq: Winning the war, losing the peace* (New Haven and London: Yale University Press, 2007), 173; Kurzman, *The Missing Martyrs*, 142; Nance, *The Terrorists of Iraq*, 4.

²¹¹ "The National Security Strategy of the United States of America, September 2002," 6.

²¹² The 2002 US *National Security Strategy* spoke of the need to "help people around the world learn about and understand America." *Ibid*, 31.

²¹³ This was to be achieved through various means, including establishing or co-opting/funding 'official' Muslim representative bodies, funding Islamic media, literature, news and talk shows, sponsor individual 'moderate' spiritual leaders, establish westernised schools or 'moderate' madrassas to counter and/or offer an alternative to 'radical' madrassas, pressure existing Muslim media sources to moderate their discourse, urge Westernising educational reform in Muslim countries, and pressure Muslim leaders to instil in their subjects the notion that "American values are not at odds with Islam". See: Yvonne Yazbeck Haddad and Tyler Golson, "Overhauling Islam: Representation, Construction, and Cooption of 'Moderate Islam' in Western Europe," *Journal of Church and State* 49(3) (Summer, 2007), 500-504; Samuel J. Rascoff, "Establishing official Islam? The law and strategy of counterradicalization," *Stanford Law Review* 64(1) (Feb., 2012), 146; Saba Mahmood, "Secularism, Hermeneutics, and Empire: The Politics of Islamic Reformation," *Public Culture* 18(2) (2006), 330-331; Gregory Starrett, "The American Interest in Islamic Schooling: A Misplaced Emphasis?" *Middle East Policy Council* 13(1) (Spring, 2006); and Ryan, *Full Spectrum Dominance*, 38.

²¹⁴ Domestically this generally involved severing Muslim communities from 'extremist' foreign backers by providing alternative sources of funding, the aim being to cultivate 'moderate' national

- 4) Finally, the US 2002 *National Security Strategy of the United States of America* simultaneously maintained the progressive paradigm-leaning imperative of promoting neoliberal economic reforms globally – with their “proven their ability to lift whole societies out of poverty”²¹⁵ – as a means of “champion[ing] aspirations for human dignity.”²¹⁶ Contrary to the dominating conservative sub-paradigms outlined above, this was guided by the Clintonian progressive paradigm assertion that Islamist IV was driven by “poverty, deprivation, social disenfranchisement, and unresolved political and regional disputes.”²¹⁷

It was with this set of conventional wisdoms that the Bush administration and its allies embarked on and waged the early GWOT (see Chapter 3).

1.2.7. Radicalisation into Violent Extremism [RVE], c. 2004-present:

This most recent conservative paradigm iteration – which remains dominant today – began formulating in 2002²¹⁸, although it did not enter mainstream

Islams (*à la exporting extremism* sub-paradigm) (Haddad and Golson, “Overhauling Islam,” 497-499). More broadly this often involved attempts to actively change the religion of Islam *à la anti-liberal* sub-paradigm: One particularly radical yet influential study even advocated urging Muslims to regard the Qur’an not as the literal word of God but a piece of historical literature so that they might engage in the critical thinking necessary liberal democratic values – a shift that, the report failed to note, would render the entire faith redundant. (Benard, *Civil Democratic Islam* – see critique in Mahmood, “Secularism, Hermeneutics, and Empire,” 334).

²¹⁵ “National Security Strategy”, iv-v.

²¹⁶ Ibid.

²¹⁷ “National Strategy for Combatting Terrorism,” *The White House* (February 2003). Available at: <https://fas.org/irp/threat/ctstrategy.pdf>, 22.

²¹⁸ The concept of ‘radicalisation’ was initially developed by the *Dutch Intelligence Service* [AIVD] which released a report in December 2002 attempting to profile the type of individuals successfully recruited by foreign terrorist recruiters in the Netherlands. The factors identified focussed on micro-level personal factors such as a personal longing for identity, self-respect, brotherhood, existential comfort and redemption for former lives of crime. See: Rik Coolsaet, *‘All Radicalisation is local’: the genesis and drawbacks of an elusive concept* (Brussels: Egmont – The Royal Institute for International Relations, 2016), 8; Arun Kundnani and Ben Hayes, *The globalisation of Countering Violent Extremism policies: Undermining human rights, instrumentalising civil society* (Amsterdam: Transnational Institute, 2018), 5-6. By 2003, the uncovering of several British domestic terrorist cells prompted the UK to begin tentatively looking towards the Dutch example, culminating that year in the first iteration of the now path-defining PREVENT strategy based on the RVE logic. See: Lorenzo Vidino and James Brandon, *Countering Radicalization in Europe* (London: International Centre for the Study of Radicalisation and Political Violence, 2012), 11; Shandon Harris-Hogan, et al., “What is countering violent extremism? Exploring CVE policy and practice in Australia,” *Behavioral Sciences of Terrorism and Political Aggression* 8(1) (2016), 7.

academic thinking²¹⁹ or policy²²⁰ and media²²¹ discourses until 2004. It developed primarily in response to changes in the dominant IV imaginary, prompted by a string of domestic Islamist terrorist attacks in Europe (chiefly 2004 Madrid and 2005 London) accompanied by the uncovering of multiple European terrorist cells²²². The demographic backgrounds of these IV perpetrators rendered the early GWOT's sub-paradigms untenable: they were citizens of liberal democratic societies who had enjoyed first-hand the opportunities, freedoms, and prosperity afforded by the Wests' establishment ideology (rather than perceiving it through the distorted lens of authoritarian propagandists) and had been educated in secular Western schools rather than radical madrassas²²³. Of the early GWOT's sub-paradigms, the only one that remained tenable was the notion that these individuals were being indoctrinated into an 'extremist' interpretation of Islam by radical mosques funded by foreign powers (chiefly Saudi Arabia – *à la exporting extremism/Islamic civil war* sub-paradigms). This logic of *ideological persuasion* through religious indoctrination thus became a cornerstone of RVE, and was

²¹⁹ In a review of thirty peer-reviewed journals, Kundnani found that mention of 'radicalisation' sky-rocketed beginning in 2004 (Arun Kundnani, "Radicalisation: the journey of a concept," *Race & Class* 54(2) (2012), 7), while Githens-Mazer and Lambert identify the 2005 *London Bombings* as a defining catalyst in prompting academic interest in radicalisation (Jonathan Githens-Mazer and Robert Lambert, "Why conventional wisdom on radicalization fails: the persistence of a failed discourse," *International Affairs* 86(4) (Jul., 2010), 889).

²²⁰ Beginning in 2004, the concept of RVE (initially under a variety of names) proliferated rapidly across Western political and policy discourses. The concept was first adopted in a May 2004 counterterrorism document by the European Union, followed up in 2006 by the European Commission's establishment of an *Expert Group on Violent Radicalisation*. Simultaneously, in 2005 the US formally replaced the terminology of a GWOT with that of an RVE-influenced *Struggle against Violent Extremism* [SAVE] and, in 2006, the UK established its revised PREVENT strategy, which is now commonly regarded as both the first practical example of a *Countering Violent Extremism* [CVE] strategy and a trend-setting precursor to the global proliferation of similar such programmes. See: Harris-Hogan, et al., "What is countering violent extremism?" 7; Kundnani and Hayes, *The globalisation*, 8; Vidino and Brandon, *Countering Radicalization in Europe*, 11; Owen Frazer & Christian Nünlist, "The Concept of Countering Violent Extremism," *CSS Analyses in Security Policy* 183 (Dec., 2015), 2; Alex P. Schmid, *Radicalisation, De-Radicalisation, Counter-Radicalisation: A Conceptual Discussion and Literature Review* (The Hague: International Centre for Counter-Terrorism, 2013), 10.

²²¹ In a review of English language press usage of the term 'radicalisation', Sedgwick found the term's usage exponentially increased between 2005-2007, seemingly prompted by the 2005 London bombings. See: Mark Sedgwick, "The Concept of Radicalization as a Source of Confusion," *Terrorism and Political Violence* 22(4) (2010), 480.

²²² Schmid, *Radicalisation*, iv; Arun Kundnani, *A Decade Lost: Rethinking Radicalisation and Extremism* (London: Claystone, 2015), 9; Bart Schuurman and Max Taylor, "Reconsidering Radicalization: Fanaticism and the Link Between Ideas and Violence," *Perspectives on Terrorism* 12(1) (Feb., 2018), 6; Jonathan Githens-Mazer, "The rhetoric and reality: radicalization and political discourse," *International Political Science Review* 33(5) (2012), 557; Harris-Hogan, et al., "What is countering violent extremism?" 7.

²²³ Of course, as Kurzman notes, the influence of madrasas had been wildly exaggerated regarding non-domestic Islamist IV. For example, only two of the nineteen 9/11 perpetrators had been educated in madrassas (Kurzman, *The Missing Martyrs*, 67).

combined with updated Cold War era domestic IV logics (chiefly ‘vulnerability profiles’) to produce three broad sub-paradigms:

- 1) *The ‘false grievance’ sub-paradigm*: manipulation and misinformation through propaganda or individual targeted recruitment *ideologically persuades* a ‘vulnerable’ individual that the establishment is corrupt, illegitimate, and/or tyrannical/predatory and must be forcefully overthrown and replaced with a purer alternative²²⁴.
- 2) *The ‘post facto grievance’ sub-paradigm*: psychologically-unfulfilled individuals gravitate towards an ideological movement for personal, apolitical reasons of self-actualisation (e.g., purpose, belonging, status, etc.), and adopt the ideology’s stated grievances on a *post facto* basis to rationalise their attraction to the movement²²⁵.
- 3) *The ‘obediently violent’ sub-paradigm*: reserved almost exclusively for Islamist IV – and directly recalling the early GWOT’s exporting *extremism/Islamic Civil War* sub-paradigm - a vulnerable individual is indoctrinated into a warped understanding of their religion that commands them to kill unbelievers and/or purported enemies of the faith as its own end (usually as a divine, genocidal command)²²⁶. Thus conceived, IV is an act not of grievance-remedying activism but obedience to chauvinistic, intolerant doctrine.

While the insufficiency of early GWOT logics motivated the development of RVE, it retained the conservative paradigm’s foundational assumptions, which were affirmed and reified by simplistic deductions from contextually-bounded empirical observations that failed to countenance complex/compound causation. Chiefly,

²²⁴ UK PM David Cameron has routinely spoken of a ‘grievance narrative’ pedalled by ‘extremists’ to ‘radicalise’ vulnerable individuals. He characterises this as the active spread of misinformation and conspiracy theories to persuade people that the West is at war with Islam. For example, in a speech at the UN, he asserted of the ‘radicalisation process’: “Now maybe it starts with being told that Christians and Muslims can’t live together. Maybe it moves on to being told that Muslims everywhere in the world are under attack, the grievance narrative. Sometimes it’s being told that the terrible attack that took place in the city on 9/11 was somehow a Jewish conspiracy.” See: “Prime Minister on ISIL at UN General Assembly,” *Prime Minister’s Office, 10 Downing Street*, dated September 29 2015. Accessed September 10 2019. Available at: <https://www.gov.uk/government/speeches/prime-minister-on-isil-at-un-general-assembly>. This is elaborated upon below.

²²⁵ See below.

²²⁶ Largely a hangover from early GWOT discourses rooted in the *exporting extremism/Islamic civil war sub-paradigm*, this is generally implicit in radicalisation literature, made clear in the logic undergirding ‘ideological replacement’ mitigating strategies (see below).

RVE scholars took for granted that macro-causation and stated grievances could be discounted as causally relevant because, while many shared those grievances and suffered under those macro-conditions, only a tiny proportion of them turned to 'extremist' ideas and/or violence²²⁷ (while RVE scholars have given varying levels of acknowledgement to grievances as at least of partial – if always tertiary – causal importance²²⁸, governments have typically dismissed grievances entirely as figments conjured *ex nihilo* by ideological movement brainwashers)²²⁹. Hence, causation must exist (primarily or totally) at the micro-level: that an individual's particular temperament and/or circumstances must dictate their

²²⁷ Veldhuis and Staun, *Islamist Radicalisation*, 22; Schmid, *Radicalisation, De-Radicalisation*, 26; Jessica Stern, "Radicalization to Extremism and Mobilization to Violence: What Have We Learned and What Can We Do about It?" *The Annals of the American Academy of Political and Social Science* 668(1) (2016), 104.

²²⁸ From the likes of Veldhuis and Staun who urge considering multiple levels of causation – macro, meso, micro - because the macro alone is clearly insufficient (Veldhuis and Staun, *Islamist Radicalisation*); to Dalgaard-Nielsen's empirical findings that only half of interviewed IRA supporters had even been aware of the group's grievances prior to joining (Anja Dalgaard-Nielsen, "Studying violent radicalization in Europe I: The potential contribution of social movement theory," *Danish Institute for International Studies* (2008). Available at: https://pure.diis.dk/ws/files/56375/WP08_2_Studying_Violent_Radicalization_in_Europe_I_The_Potential_Contribution_of_Social_Movement_Theory.pdf, 5); to the blanket delegitimising statement of a usually-more-nuanced Sageman, who sweepingly asserted in 2008 that "Terrorists are simply young people seeking fame and thrills, like all the terrorists all over the world in the past 130 years. They believe that they are special" (Marc Sageman, "A Strategy for Fighting International Islamist Terrorists," *The Annals of the American Academy* 618 (Jul., 2008), 224).

²²⁹ This has generally involved various combinations of 1) portraying grievances as entirely fanciful, manipulative narratives for justifying extremism (see: Dearden, "David Cameron extremism speech,"; "Prime Minister on ISIL,"); 2) stressing that grievances are 'perceived grievances' conjured *ex nihilo* by ideological movements ("CONTEST: The United Kingdom's Strategy for Countering Terrorism - June 2018," Presented to Parliament by the Secretary of State for the Home Department by Command of Her Majesty, June 2018. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/716907/140618_CCS207_CCS0218929798-1_CONTEST_3.0_WEB.pdf, 7); 3) asserting that ideological movements are not pursuing grievance resolution, but rather totalitarian or chauvinistic objectives ("CONTEST," 3, 7, & 23; HM Government, "Counter-Extremism Strategy," Presented to Parliament by the Secretary of State for the Home Department by Command of Her Majesty, October 2015. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/470088/51859_Cm9148_Accessible.pdf, 21; "Prevent Strategy," Presented to Parliament by the Secretary of State for the Home Department by Command of Her Majesty, June 2011. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/97976/prevent-strategy-review.pdf, 5; "National Strategy for Counterterrorism of the United States of America," Seal of the President of the United States (October 2018), i; Dearden, "David Cameron extremism speech"); 4) explicating as motives everything BUT grievances (e.g. ideological persuasion, cultural reasons, material gain, psychological fulfilment, identity, meaning, community, see: "CONTEST," 16; "Prevent Strategy," 17); and/or or stressing ideological persuasion to be the necessary and sufficient causal mechanism ("CONTEST," 16; HM Government, "Counter-Extremism Strategy," 5, 10, & 21; "Prevent Strategy," 5; "FACT SHEET: U.S. State Department and USAID Supported Initiatives to Counter Violent Extremism," U.S. Department of State, dated February 19 2015. Accessed February 1 2020. Available at: <https://2009-2017.state.gov/r/pa/prs/ps/2015/02/237647.htm>; "National Strategy for Counterterrorism of the United States of America," 2).

emotional response to those macro-factors and ‘perceived’ grievances, and/or their susceptibility towards being duped by ‘extremist’ propagandists and recruiters (a summation already naturalised by Cold War behaviouralism). Thus, although some RVE scholars acknowledge that macro-level ‘permissive conditions’ may increase the persuasiveness of an ideology’s claims (in that ideological movements can point to those conditions as ‘proofs’ of their claims), it is generally maintained that such conditions are unlikely to be perceived as constituting a blame-worthy injustice necessitating a radical and violent response absent *ideological persuasion* articulating it as such²³⁰. An additional point to note is that the attention to grievances considered by *some* RVE scholars results in part from the aforementioned lack of explication/differentiation between extant paradigms and, perhaps more importantly, the hegemonic position of RVE, which corrals many researchers – including those who consider grievances causally important – to working within the RVE framework/nomenclature because 1) it is the only available framework visible to many entrants into the field²³¹; 2) the concept/phenomenon of ‘radicalisation’ has attained a status of ‘common-sense’ (even while its specifics remain obscure or open to debate); and/or 3) RVE is the only framework sanctioned for those seeking funding and/or to play an active role in policy discussions²³². As noted, Governmental discourses – from which RVE originated (see below) - have been explicit in discounting the role of grievances, frequently asserting *ideological persuasion* to be *the* necessary and sufficient root cause of engagement in IV, and most government funded research is expected to build on this.

Not only did this follow a simplistic but convincing deductive logic, it moreover conformed with older, much reified earlier conservative paradigm iterations. Recalling Cold War problematisations, it took as its point of departure the establishment-normative assumption that individuals living in the free and prosperous West could not possibly have legitimate grievances, and so must be acquiring *perceptions* of injustice from manipulative, reality-distorting ideologies,

²³⁰ For a particularly explicit exposition of this dynamic, see Veldhuis and Staun, *Islamist Radicalisation*, 24. It is also summarised in Schmid’s conceptual discussion and literature review (Schmid, *Radicalisation, De-Radicalisation*, 28).

²³¹ As was my own position upon commencing this study, and as noted in the analytical framework.

²³² As we have begun to note in the introduction and analytical framework, and which we expand upon further below.

and/or be projecting personal anger upon their environment because of psychological maladjustment, unfulfillment, or trauma²³³. Additionally, at a more subconscious level, it chimed with entrenched Western orientalist stereotypes on the ‘irrationality’, ‘fanaticism’, and ‘bigotry’ of Muslims²³⁴. As noted, some minimise even the importance of *perceived* injustices, instead considering IV collateral damage from psychologically unfulfilled individuals joining ideological movements for reasons of self-actualisation, e.g., belonging, community, purpose, etc., with identification with those perceived injustices being merely a *post facto* rationalisation for identification with the movement, and engagement in violence being a mere sinew of that attraction – one which could have just as easily found expression in gang violence or school shooting sprees were the individual placed in different circumstances²³⁵.

Accordingly, understanding IV causation is constrained to understanding how, why, and to whom *ideological persuasion* occurs, or to whom ideologies/movements appeal and why. Generally, this task is broken down into three approximate research questions:

- 1) *Who radicalises?*: building on Cold War assumptions about certain personality traits being peculiarly ‘vulnerable’ to *ideological persuasion* (or attraction to ideologies/movements) – affirmed by RVE’s deduction that the marginality of *ideological persuasion/IV* suggests only specific types of individuals are prone to it – RVE literature identifies a number of types of ‘vulnerability’:
 - a. *Educational deficiencies*: despite a dearth of empirical evidence²³⁶, the assumption that ideologies are inherently irrational and foolish, and *ideological persuasion* inherently manipulative, reifies old assumptions – dating back to post-

²³³ Our societies being “without a shadow of doubt, a beacon to the world [...] [thus] What we are fighting, in Islamist extremism, is an ideology” (Dearden, “David Cameron extremism speech”).

²³⁴ As we have discussed in the above sections on colonial and early GWOT iterations of the conservative paradigm.

²³⁵ See below.

²³⁶ On the contrary, research has shown that many IV perpetrators are highly-educated. Sageman found that, while 17% did not graduate from high school, over 60% had some level of college education and 6% had doctoral degrees, making them more educated than the average person worldwide (Marc Sageman, *Understanding Terror Networks* (Philadelphia: University of Pennsylvania, 2004), 73-79). See also: Jeff Victoroff, “The Mind of the Terrorist: A review and critique of Psychological approaches,” *Journal of Conflict Resolution* 49(1) (Feb., 2005), 7-10; and Andrew Silke, “Holy Warriors: Exploring the Psychological Processes of Jihadi Radicalization,” *European Journal of Criminology* 5(1) (2008), 107.

French Revolutionary reactionism – that lack of education, particularly a lack of critical thinking skills, renders individuals ‘vulnerable’²³⁷.

- b. *Cognitive styles*: certain thought habits or predispositions are seen as rendering individuals vulnerable to manipulation, or otherwise likely to be endeared to ideologies/movements (see below). Hypothesised styles include: 1) convergent thinking²³⁸; 2) cognitive inflexibility²³⁹; 3) uncertainty intolerance²⁴⁰; 4) attribution error tendency²⁴¹; and 5) dualistic thinking²⁴², etc.
- c. *Psychological unfulfillment*: individuals unable to satisfy basic psychological needs (e.g., meaning²⁴³, belonging²⁴⁴, self-

²³⁷ Ratna Ghosh, et al., “Can education counter violent religious extremism?” *Canadian Foreign Policy Journal* 23 (2017), 120; Eric Harper, “Reconceptualizing the drivers of violent extremism,” *Terre des hommes – helping children worldwide & WANA Institute* (2018). Available at: https://www.tdh.ch/sites/default/files/tdh_wana_pve_en_light.pdf, 27; UNESCO, *Preventing violent extremism through education: A guide for policy-makers* (Paris: United Nations Educational, Scientific and Cultural Organization, 2017), 20; and Sheelagh Stewart, “Building resistance to violent extremism: a cultural relations approach,” *British Council* (Feb., 2018). Available at: https://www.britishcouncil.org/sites/default/files/discussion_paper_building_resistance_to_violent_extremism_finalv1.pdf, 4.

²³⁸ i.e. the tendency to emphasise information that bolsters one’s worldview, while filtering out contradictory information (Bruce Hunsberger and Lynne M. Jackson, “Religion, meaning, and prejudice,” *Journal of Social Issues* 61(4) (2005), 816).

²³⁹ John Horgan, *The Psychology of Terrorism*, 2nd ed. (Oxon: Routledge, 2014), 81.

²⁴⁰ Ibid.

²⁴¹ i.e. attributing successes to oneself while attributing failures to external injustices beyond one’s own control (Ibid; Randy Borum, “Psychological Vulnerabilities and Propensities for Involvement in Violent Extremism,” *Behavioural Sciences and the Law* 32 (2014), 295).

²⁴² Borum, “Psychological Vulnerabilities,” 291.

²⁴³ Anja Dalgaard-Nielsen, “Violent Radicalization in Europe: What We Know and What We Do Not Know,” *Studies in Conflict & Terrorism* 33(9) (2010): pp. 797-814; Edwin Bakker & Roel de Bont, “Belgian and Dutch Jihadist Foreign Fighters (2012–2015): Characteristics, Motivations, and Roles in the War in Syria and Iraq,” *Small Wars & Insurgencies* 27(5) (2016), 845; Erin P. Hennes, et al., “Not all ideologies are created equal: epistemic, existential and relational needs predict system-justifying attitudes,” *Social Cognition* 30(6) (2012), 671; Marieke Sloopman and Jean Tillie, *Processes of Radicalisation: Why some Amsterdam Muslims become radicals* (Amsterdam: Institute for Migration and Ethnic Studies, Universiteit van Amsterdam, 2006), 5; Oluf Gøtzsche-Astrup, “The time for causal designs: Review and evaluation of empirical support for mechanisms of political radicalisation,” *Aggression and Violent Behavior* 39 (2018), 93; and Borum, “Psychological Vulnerabilities,” 292.

²⁴⁴ Dalgaard-Nielsen, “Violent Radicalization,”; Sloopman and Tillie, *Processes of Radicalisation*, 5; Gøtzsche-Astrup, “The time for causal designs,” 93; Borum, “Psychological Vulnerabilities,” 292; and Rik Coolsaet, “Facing the fourth foreign fighters wave: what drives Europeans to Syria, and to Islamic State? Insights from the Belgian Case,” *The Royal Institute for International Relations*, Egmont Paper 81 (Mar., 2016), 3.

esteem²⁴⁵, purpose²⁴⁶, identity²⁴⁷, certainty²⁴⁸, respect²⁴⁹, control/self-efficacy²⁵⁰, etc.) through ‘conventional’ avenues (e.g., meaningful work, family, friendships, ‘active citizenship’, etc.) are considered more likely to attempt to fulfil those needs through embracing an ideology/movement (see below).

- 2) *What is the appeal of ‘extremist’ ideologies/movements to such people?*: This appeal is hypothesised to lie in their ability to provide cognitive certainty and structure to those with the requisite cognitive styles²⁵¹, empowering social identities and a sense of belonging,

²⁴⁵ Jordy Krasenberg and Lieke Wouterse, “Grooming for terror – Manipulation and control,” *European Union Radicalisation Awareness Network* (Apr., 2019), 4; and Ian McGregor, et al., “Ideological and personal zeal reactions to threat among people with high self-esteem: motivated promotion focus,” *Personality and Social Psychology Bulletin* 33(11) (2007): pp. 1587-1599.

²⁴⁶ Harper, “Reconceptualizing the drivers,” 28.

²⁴⁷ Alyssa Chassman, “Islamic State, Identity, and the Global Jihadist Movement: How is Islamic State successful at recruiting ‘ordinary’ people?,” *Journal for Deradicalization* 9 (Winter 2016/2017), 208-209; Brian Michael Jenkins, “Building an Army of Believers: Jihadist Radicalization and Recruitment,” *Testimony presented before the House Homeland Security Committee, Subcommittee on Intelligence, Information Sharing and Terrorism Risk Assessment* (April 2007). Available at:

https://www.rand.org/content/dam/rand/pubs/testimonies/2007/RAND_CT278-1.pdf, 3; Edoardo Tolis, “Investigating the influence of ISIS radicalisation on the recruitment process: a critical analysis,” *Journal of Policing, Intelligence and Counter Terrorism* 14(2) (2019), 141; Horgan, *The Psychology of Terrorism*, 81; Borum, “Psychological Vulnerabilities,” 292; Dutch General Intelligence and Security Service, *Recruitment for the jihad in the Netherlands: from incident to trend* (The Hague: AIVD, 2002), 11; and Veldhuis and Staun, *Islamist Radicalisation*, 49.

²⁴⁸ Mark J. Brandt and Christine Reyna, “The role of prejudice and the need for closure in religious fundamentalism,” *Personality and Social Psychology Bulletin* 36(5) (2010): pp. 715-725; Alejandro Beutel, et al., “Field Principles for Countering and Displacing Extremist Narratives,” *Journal of Terrorism Research* 7(3) (Sep., 2016): pp. 35-49; Michael A. Hogg, et al., “Uncertainty and the roots of extremism,” *Journal of Social Issues* 69(3) (2013): pp. 407-418; John T. Jost, et al., “Can a Psychological Theory of ideological differences explain contextual variability in the contents of political attitudes?” *Psychological Inquiry* 20(2/3) (2009): pp. 183-188; and Kyle Nash, et al., “Threat and defense as goal regulation: from implicit goal conflict to anxious uncertainty, reactive approach motivation, and ideological extremism,” *Journal of Personality and Social Psychology* 101(6) (2011): pp. 1291-1301.

²⁴⁹ Dalgaard-Nielsen, “Violent Radicalization,”; Arie W. Kruglanski, et al., “The Psychology of Radicalization and Deradicalization: How Significance Quest Impacts Violent Extremism,” *Advances in Political Psychology* 35(1) (2014): pp. 69-93; and Sloodman and Tillie, *Processes of Radicalisation*, 5.

²⁵⁰ Brandt and Reyna, “The role of prejudice,”; McGregor, et al., “Ideological and personal zeal”.

²⁵¹ ‘Extremist’ ideologies satisfy needs for epistemic certainty in two ways. Firstly, the ideologies themselves often provide accessible, simplistic, two-dimensional, universal and all-encompassing explanations that link past events to contemporary conditions, and allow new information to be easily assimilated into a unifying sense-making framework (Samantha Mahood and Halim Rane, “Islamist narratives in ISIS recruitment propaganda,” *The Journal of International Communication* 23(1) (2017), 17). Moreover, they often provide clear information as to 1) who is friend and who is foe; 2) how friend and foe are likely to act and feel, 3) and how you, as a member of the group, should act and feel (Michael A. Hogg, “From Uncertainty to Extremism: social categorization and identity processes,” *Current Directions in Psychological Science* 22(5) (2014), 338-340; and Simona Tripat et al., “Psychological Mechanisms Involved in Radicalization and Extremism. A Rational Emotive Behavioral Conceptualization,” *Frontiers in Psychology* 10(437) (Mar., 2019), 3). Secondly, by associating with members of that movement, one surrounds themselves with people who hold similar or identical views, creating an echo chamber than confirms the veracity

purpose, and respect to the psychologically-unfulfilled²⁵², and a cathartic, responsibility-shirking explanatory narrative for those suffering socioeconomic underachievement and/or low status – alongside an actionable blueprint through which they might escape those circumstances²⁵³. The under-educated, much like during the post-French Revolutionary era, are perceived as ‘vulnerable’ to manipulation, particularly when it comes to ‘obediently violent’ forms of IV (lacking the critical thinking skills to see through perverted interpretations of Islam), and/or ‘artificial grievance’ forms (lacking the critical thinking skills to see through erroneous narratives and conspiracy theories).

and appropriateness of one’s own attitudes. Thus, the individual can “insulate themselves from divergent views by effectively living in a world of consensus”, a consensus that is rigidly enforced in ‘extremist’ movements with authoritarian leaders who tolerate no dissent in belief or behaviour (Hogg, at al., “Uncertainty,” 410-412). Thirdly, they typically espouse dualistic narratives likely to attract individuals with dualistic cognitive styles. For example, scholars studying the propaganda of IS have noted that the group draws clear lines between the ingroup (group members/supporters) and the outgroup (everyone else), and similarly dichotomises clearly between the source of the world’s problems (the outgroup) and the innocent victims and often solution (the ingroup) (Haroro J. Ingram, “An analysis of Islamic State’s Dabiq magazine,” *Australian Journal of Political Science* 51(3) (2016): pp. 458-477; Haroro J. Ingram, *A ‘Linkage-Based’ Approach to Combating Militant Islamist Propaganda: A Two-Tiered Framework for Practitioners* (The Hague: International Centre for Counter-Terrorism, 2016); Julian Droogan and Shane Peattie, “Mapping the thematic landscape of Dabiq magazine,” *Australian Journal of International Affairs* 71(6) (2017): pp. 591-620; and Mahood and Rane, “Islamist narratives”).

²⁵² Ideologies/movements enable individuals with low self-esteem to re-identify as a member of an empowered and morally-superior social movement (Chassman, “Islamic State,” 241; and Peter R. Neumann and Brooke Rogers, *Recruitment and Mobilisation for the Islamist Militant Movement in Europe* (London: Kings College London, 2007), 68). Similarly, involved in an movement provides the individual with a sense of belonging by immersing them in a tight-knit group of comrades united in adversity (Dalgaard-Nielsen, “Violent Radicalization,” 807; Jenkins, “Building an Army,” 4; Borum, “Psychological Vulnerabilities,” 293; and Veldhuis and Staun, *Islamist Radicalisation*, 49); a sense of purpose and personal significance is directing their energies towards a cause larger and more noble than themselves (Jenkins, “Building an Army,” 4; Tolis, “Investigating the influence,” 141; Jon A. Olsen, “Roads to militant radicalization: interviews with five former perpetrators of political motivated organized violence,” *Danish Institute for International Studies* (2009), 15; Olivier Roy, “Al Qaeda in the West as a Youth Movement: The Power of a Narrative,” *Centre for European Policy Studies* 168 (Aug., 2008), 1; and Arie Kruglanski, et al., “The Making of Violent Extremists,” *Review of General Psychology* 22(1) (2018), 109); and a sense of respect and dignity through immersion in a counter-culture where one has the chance to earn renown through martial prowess and courage (Jenkins, “Building an Army,” 4), and forms of ‘street-cred’ denied to them under the rules of ‘normal’ society by changing the rules of what is deemed worthy of respect and admiration (Chassman, “Islamic State,” 238; Winter, *An integrated approach*, 8; Stern, “Radicalization,” 106).

²⁵³ Ideological movements provide cathartic narratives that allow individuals to externally-attribute their circumstances and even personal failings to the malevolent machinations of a clear enemy, who can then be righteously attacked. This both enhances self-esteem (because one’s condition is no longer one’s own fault), promotes grouping and social identification (“we – the noble few – are in this together against the oppressors”), and appeals to those with a cognitive style prone to attribution error. (see: Gøtzsche-Astrup, “The time for causal designs,” 92).

- 3) *How and why does radicalisation occur?*: from here, it remains to be seen how the ‘vulnerable’ are ‘radicalised’. Despite much variance, hypothesised explanations generally follow a common pattern:
- a. *Initiation*: while many assume mere exposure to propaganda may be sufficient to radicalise a vulnerable individual, some scholars assert that ‘radicalisation’ is usually initiated by ‘cognitive openings’: destabilising life experiences that propel the individual into a state of epistemic crises – shattering their previously taken-for-granted assumptions about the world and their place in it, and rendering them open to new assumptions they would ordinarily (and rationally) view as repugnant and illogical²⁵⁴. Suggested causes include personal “traumatic biographical events”²⁵⁵ such as the loss of a loved one, job, home, way of life, etc.²⁵⁶, in addition to deliberate attempts by recruiters to provoke such an opening by “raising consciousness, challenging and debating alternatives ideas, and persuading audiences that old ways of thinking are inadequate for addressing pressing economic, political and social concerns²⁵⁷” or by circulating gruesome videos of atrocities being committed by perceived oppressors as a means of provoking moral outrage²⁵⁸.
 - b. *Top-down radicalisation*: rests on traditional conservative paradigm notions of subversive agents preying upon essentially passive vulnerable individuals. This can be personal (“grooming” - in which a recruiter befriends a targeted individual and seeks to gradually manipulate them into embracing the

²⁵⁴ Schmid, *Radicalisation, De-Radicalisation*, 6; Quintan Wiktorowicz, *Radical Islam Rising: Muslim Extremism in the West* (Lanham: Rowman & Littlefield Publishers, Inc., 2005), 5; Clark McCauley and Sophia Moskalenko, *Friction: How radicalization happens to them and us* (New York: Oxford University Press, 2011), 80; Tolis, “Investigating the influence of ISIS,” 131; Mitchell D. Silber and Arvin Bhatt, *Radicalization in the West: The Homegrown Threat* (New York: New York Police Department Intelligence Division, 2007), 6; and Neumann and Rogers, *Recruitment and Mobilisation*, 67.

²⁵⁵ Wiktorowicz, *Radical Islam*, 21.

²⁵⁶ Clark McCauley and Sophia Moskalenko, “Understanding Political Radicalization: The Two-Pyramids Model,” *American Psychologist* 72(3) (2017), 206; Silber and Bhatt, *Radicalization*, 30; Horgan, *The Psychology of Terrorism*, 103.

²⁵⁷ Wiktorowicz, *Radical Islam*, 5.

²⁵⁸ Neumann and Rogers, *Recruitment*, 70.

ideology)²⁵⁹ or impersonal (in which an individual consumes propaganda that *ideologically persuades* them of the evil of the establishment and validity of the ideology/movement)²⁶⁰.

- c. *Bottom-up radicalisation*: involves cliques of like-minded individuals propelling each other – through various group dynamics – towards radicalisation²⁶¹. As group members become more extreme in their beliefs, they become isolated from ‘moderating voices’ (family, other peer groups, etc.) and exist in an echo chamber that reinforces and reifies those ‘extremist’ views and de-humanises and demonises those ‘moderating’ voices and society at large²⁶². As the clique members reach a level of radicalisation by which they resolve to act, they either seek out opportunities to join ‘extremist’

²⁵⁹ Various theories exist as to the specific methods and mechanisms involved in such ‘grooming’. Prominent examples include: Dutch General Intelligence and Security Service, *Recruitment*, 16; Neumann and Rogers, *Recruitment*, 38; J.M. Berger, “Tailored Online Interventions: the Islamic State’s Recruitment strategy,” *CTC Sentinel* 8(10) (Oct., 2015), 20; J. M. Berger, *Making CVE Work: A Focused Approach Based on Process Disruption* (The Hague: International Centre for Counter-Terrorism, 2016), 14; Krasenberg and Wouterse, “Grooming,” 4; Brian Fishman and Abdullah Warius, “A Jihadist’s Course in the Art of Recruitment,” *CTC Sentinel* 2(2) (2009); Charlie Winter, *An integrated approach to Islamic State recruitment* (Barton: Australian Strategic Policy Institute, 2016), 6-10; Tolis, “Investigating the influence of ISIS,” 132; Jenkins, “Building an Army,” 4; Chassman, “Islamic State,” 241.

²⁶⁰ Again, multiple methods and mechanisms are hypothesised, all sharing a unity around *ideological popularisation*. Examples include: Droogan and Peattie, “Mapping the thematic landscape,” 616-617; Ingram, “An analysis of Islamic State’s Dabiq,” 461; Winter, *An integrated approach*, 10; Tolis, “Investigating the influence of ISIS,” 141; Kurt Braddock, “The utility of narratives for promoting radicalization: The case of the Animal Liberation Front,” *Dynamics of Asymmetric Conflict* 8(1) (2015), 53; Chassman, “Islamic State,” 238; Angela Tretheway, et al., “Out of Their Heads and Into Their Conversation: Countering Extremist Ideology,” *Consortium for Strategic Communication Arizona State University Report #0902* September 14, 2009. Available at: <https://csc.asu.edu/wp-content/uploads/pdf/123.pdf>, 6-7; James P. Farwell. “The Media Strategy of ISIS,” *Survival* 56(6) (2014), 50; Alex P. Schmid, *Radicalisation, De-Radicalisation*, 34.

²⁶¹ Such dynamics include: 1) the group adopting the views of its most ‘extreme’ members; 2) the cultivation of shared systems of meaning, values and beliefs through constant close interaction and isolation from other influences; 3) echo-chamber dynamics encouraging reinforcement and escalation of grievances and radical beliefs; 4) in-group competition leading to spiralling one-upmanship in espousing more and more radical beliefs; 5) ‘extremity-shift’; and 6) group-polarisation. See: Marc Sageman, *Leaderless Jihad: Terror Networks in the twenty-first century* (Philadelphia: University of Pennsylvania Press, 2008), 86-87; Marc Sageman, *Understanding Terror Networks* (Philadelphia: University of Pennsylvania, 2004), 108; Jamie Bartlett & Carl Miller, “The Edge of Violence: Towards Telling the Difference Between Violent and Non-Violent Radicalization,” *Terrorism and Political Violence* 24(1) (2012), 16; Silber and Bhatt, *Radicalization*, 9; Randy Borum, “Radicalization into Violent Extremism I: A Review of Social Science Theories,” *Journal of Strategic Security* 4(4) (Winter 2011), 20.

²⁶² Sageman, *Leaderless Jihad*, 86-87.

groups²⁶³ or else act independently if such groups cannot be accessed²⁶⁴.

These are all politically expedient narratives for establishment defenders, enabling IV perpetrators to be handily dismissed as misguided (in the case of educational deficiency), intolerant or 'difficult' (in the case of cognitive styles), 'losers'²⁶⁵ (in the case of psychological unfulfillment), or bigoted (in the case of violent obedience to a chauvinistic religion). All the while, governments can portray themselves benevolently, employing paternalistic discourse to impart an image of patient wardship over 'problem children'²⁶⁶. This is reflected in RVE's remedial repertoires:

RVE's remedial repertoires (generally conceptualised as *Countering Violent Extremism* and *Preventing Violent Extremism* [C/PVE]) centre – like its post-French Revolutionary forbears – on quarantine and inoculation (even retaining its epidemiological vernacular²⁶⁷). The unifying assumption is that preventing

²⁶³ Rather than ideological movements actively recruiting members as in the top-down thesis, the assumption here is that "al-Qaeda does not so much recruit as position itself for only the most driven; then it allows them to petition for membership." (John M. Venhaus, "Why Youth Join al-Qaeda," *United States Institute of Peace* (May, 2010), 5). "Joining the jihad is more akin to the process of applying to a highly selective college. Many try to get in but only a few succeed, and the college's role is evaluation and selection rather than marketing." (Sageman, *Understanding Terror Networks*, 122). This is achieved by frequenting 'radicalisation magnets' such as radical mosques and radical bookstores (Neumann and Rogers, *Recruitment*, 34; Peter R. Neumann, "Joining al-Qaeda: Jihadist Recruitment in Europe," *The Adelphi Papers* 48(399) (2008), 21).

²⁶⁴ Neumann and Rogers, *Recruitment*, 24.

²⁶⁵ This has been seized upon in more crass public discourses - most notably US President Trump's branding IS as "losers" (Tal Axelrod, "Trump: ISIS members 'are losers and will always be losers'," *The Hill*, dated March 23 2019. Accessed August 22 2020. Available at: <https://thehill.com/homenews/administration/435438-trump-isis-members-are-losers-and-will-always-be-losers>) and then-Mayor of London Boris Johnson's "Jihadi wankers" rhetoric (Johnson selectively quoted from a classified MI5 report to dismiss IS fighters as "literally wankers" who are obsessed with pornography because they struggle to be successful with women. Their attraction to IS, he reasoned, stemmed from the fact that "They are not making it with girls and so they turn to other forms of spiritual comfort [...] They are just young men in desperate need of self-esteem who do not have a particular mission in life, who feel that they are losers and this thing makes them feel strong – like winners.") (Frances Perraudin and Shiv Malik, "Boris Johnson: jihadis are porn-watching 'wankers'," *The Guardian*, dated January 30 2015. Accessed August 22 2020. Available at: <https://www.theguardian.com/politics/2015/jan/30/boris-johnson-jihadis-are-porn-watching-wankers>).

²⁶⁶ Indeed, UK and US governmental discourses are filled with such language, defining their role as one of 'safeguarding' and 'supporting' the vulnerable. See: "CONTEST," 31 & 35; HM Government, "Counter-Extremism Strategy," 17; "Strategic Implementation Plan for empowering local partners to prevent violent extremism in the United States," *Executive Office of the President of the United States National Security Staff* (October 2016). <https://obamawhitehouse.archives.gov/sites/default/files/sip-final.pdf>, 2.

²⁶⁷ O'Donnell has studied this in detail, collating a list of epidemiological language used in RVE discourses that includes: "contagion", "vulnerability", "susceptibility", "infection", "virus", "germ",

ideological persuasion will directly prevent any sense of grievance and/or motive for violence. Eight approaches predominate in extant C/PVE programmes and literature:

- 1) *Resilience building*²⁶⁸: focuses is fortifying ‘vulnerable’ individuals against being ‘radicalised’ (i.e., *ideologically persuaded*). Its specific interventions vary depending on the type of ‘vulnerability’ suspected:
 - a. *Educational deficiencies*: are met with interventions seeking to foster critical thinking skills (so that individuals may guard themselves against manipulation)²⁶⁹.
 - b. *Cognitive styles*: are met with interventions seeking to balance those intolerant styles by cultivating more nuanced and open attitudes – e.g., diversity training, human rights training, etc²⁷⁰.
 - c. *Psychological unfulfillment*: is met with interventions seeking to promote ‘conventional’ means of fulfilment, from training

“therapy,” “immunisation”, and “disease”. See: Aislinn O’Donnell, “Contagious ideas: vulnerability, epistemic injustice and counter-terrorism in education,” *Educational Philosophy and Theory* 50(10) (2018): pp. 981-997.

²⁶⁸ The language of ‘resilience building’ is a relatively new addition to the lexicon – popularising around 2008 (Keiran Hardy, “Resilience in UK counterterrorism,” *Theoretical Criminology* 19(1) (2015), 87). However, as noted, this in fact marks an upgrade on a continuous strain of conservative paradigm thought since its first iterations in the aftermath of the 1789 French Revolution. RVE’s understanding of ‘resilience’ is more sophisticated yet follows essentially the same causal and prognostic logic, focussing on the afore-mentioned thesis of the ‘vulnerability’ of the educationally-deficient, with education-based interventions predominating in the literature.

²⁶⁹ Involves helping ‘vulnerable’ individuals develop critical and nuanced understandings of the world so that they might see through the simplistic, binary and Manichean portrayals pushed by ‘extremist narratives’. See: Ghosh, et al., “Can education counter,” 120; Harper, “Reconceptualizing the drivers,” 27; UNESCO, *Preventing violent extremism*, 20; and Sheelagh Stewart, “Building Resistance,” 4.

²⁷⁰ Diversity training emphasises teaching individuals to embrace and celebrate diversity and difference as “a bridge to human connection,” instilling the attitude that “we do not need to eradicate difference to feel solidarity” (Ghosh, et al., “Can education counter,” 126). Such initiatives would hope to protect ‘vulnerable’ individuals from attempts by ‘extremists’ to dichotomise and polarise ingroup and outgroup identities and portray outgroups as hostile, evil or degenerate. Similarly, human rights training seeks to help ‘vulnerable’ individuals “understand and define human connection, which is the emotional core of human identity” (Ibid, 126. See also: United Nations General Assembly, “Seventieth session Agenda: items 16 and 117: Culture of peace The United Nations Global Counter-Terrorism Strategy Plan of Action to Prevent Violent Extremism,” *Report of the Secretary-General* (Dec., 2015). Available at: http://www.un.org/en/ga/search/view_doc.asp?symbol=A/70/674, 19).

packages in ‘active citizenship’²⁷¹, personal coping skills²⁷², and ‘character education’²⁷³, to promoting positive environments and support systems (e.g., nurturing families) to help guide such individuals through every-day adversities and protecting them from falling into the company of radical milieus²⁷⁴, as well as encouraging involvement in social activities such as sports and clubs so as to relieve the boredom upon which ‘extremist’ ideologies/movements are deemed to thrive, and fostering healthy social relationships, emotional intelligence, and interpersonal skills²⁷⁵.

- 2) *Ideological replacement*: generally based on the *obediently violent* sub-paradigm on specifically Islamist IV, such interventions assume Islamist IV results simply from individuals being *ideologically persuaded* that their faith requires them to engage in violence. It therefore seeks to remove that violence motive by promoting other, non-violent interpretations of Islam²⁷⁶. Otherwise stated, such

²⁷¹ ‘Active citizenship training’ emphasises teaching individuals how to express their grievances in a constructive and cooperative way through democratic and civil society institutions and processes, thus falsifying the claims of ‘extremist’ movements that violence is the only answer. See: Stijn Sieckelinck and Amy-Jane Gielen, “Protective and promotive factors building resilience against violent radicalisation,” *European Union Radicalisation Awareness Network* (Apr., 2018), 6; “Official Statistics: Providing non-humanitarian assistance in Syria,” Foreign and Commonwealth Office [UK], Updated December 1 2015. Accessed September 5 2018. Available at: <https://www.gov.uk/government/publications/factsheet-the-uks-non-humanitarian-aid-response-to-the-syria-crisis--2/providing-non-humanitarian-assistance-in-syria>; UNESCO, *Preventing violent extremism*, 12; Ghosh, et al., “Can education counter,” 126.

²⁷² Including meditation and therapy, aimed at aiding individuals to face life’s every-day adversities, so that they are not manipulated into placing their hopes in the delusional utopias of ‘extremist’ ideologies (Sieckelinck and Gielen, “Protective and promotive,” 6).

²⁷³ Involves helping individuals to develop healthy self-esteem and values of empathy that will guard them both against the grooming of exploitative ‘extremist’ recruiters and the efforts of ‘extremist’ propagandists to de-humanise outgroup members. See: Ibid, 6; Sheelagh Stewart, “Building Resistance,” 4.

²⁷⁴ Sieckelinck and Gielen, “Protective and promotive,” 6; Stevan Weine, et al., “Building Community Resilience to Counter Violent Extremism,” *Democracy and Security* 9(4) (2013), 238; Harper, “Reconceptualizing the drivers,” 27.

²⁷⁵ Harper, “Reconceptualizing the drivers,” 27-29.

²⁷⁶ Notable suggestions in this vein include countering violent interpretations of Islam by promoting 1) non-violent quietist salafism (Zeyno Baran, “Countering Ideological Support for Terrorism in Europe: Muslim Brotherhood and Hizb ut-Tahrir—Allies or Enemies?” *Connections* 5(3) (2006): pp. 19-34; Graeme Wood, “What ISIS really wants,” *The Atlantic*, dated March 2015. Accessed October 8 2018. Available at: <https://www.theatlantic.com/magazine/archive/2015/03/what-isis-really-wants/384980/>; William McCants and Mubin Shaikh, “Experts weigh in (part 2): Is quietist Salafism the antidote to ISIS?” *The Brookings Institute*, dated March 17 2015. Accessed October 8 2018. Available at: <https://www.brookings.edu/blog/markaz/2015/03/17/experts-weigh-in-part-2-is-quietist-salafism-the-antidote-to-isis/>; Matthew D. Taylor, “Don’t Fear (All) Salafi Muslims,” *Huffington Post*, dated January 22 2016. Accessed October 8 2018. Available at:

interventions seek to replace an anti-establishment/violent interpretation of Islam with a pro-establishment/non-violent cousin.

- 3) *Identity replacement*: based on the *psychological unfulfillment sub-paradigm*, such interventions seek to provide alternative forms of identity and belonging to negate or out-compete that offered by ideologies/movements²⁷⁷.
- 4) *Ideology discrediting*: seeking to prevent or undo *ideological persuasion* by discrediting the ideology, generally by directly refuting its claims and tenets²⁷⁸.

https://www.huffingtonpost.com/matthew-d-taylor/dont-fear-all-salafi-muslims_b_9042496.html); 2) Sufism (Syed Qamar Afzal Rizvi, "Could Sufi Islam be the cure-all?" *Qantara*, dated April 29 2016. Accessed October 8 2018. Available at: <https://en.qantara.de/content/combating-violent-extremism-could-sufi-islam-be-the-cure-all>); Qari Asim, "Is Sufism the Antidote to Extremism?" *Huffington Post*, dated November 24 2016. Accessed October 8 2018. Available at: https://www.huffingtonpost.co.uk/qari-asim/is-sufism-the-antidote-to_b_13143454.html; and Sami Moubayed, "Damascene Sufism: The Antidote to ISIS," *The Huffington Post*, dated November 24 2015. Accessed October 8 2018. Available at: https://www.huffingtonpost.com/sami-moubayed/damascene-sufism-the-anti_b_8641630.html); 3) Islamic 'modernism' (Husain Haqqani, "Islam's Civil War Between Medievalists and Modernisers," *Hudson Institute*, dated November 15 2015. Accessed October 8 2018. Available at: <https://www.hudson.org/research/11912-islam-s-civil-war-between-medievalists-and-modernisers>; and Benard, *Civil Democratic Islam*); 4) Muslim nationalism (Nader Allouche, "The War inside Islam," *Huffington Post*, dated August 8 2016. Accessed October 8 2018. Available at: https://www.huffingtonpost.com/entry/the-war-inside-islam_us_57a8b807e4b08f5371f1aed5); and 5) 'mainstream' Islam as espoused by scholars of the traditional Islamic establishment(s) (Mohamed bin Ali, "Countering ISIS Ideological Threat: Reclaim Islam's Intellectual Traditions," *RSIS Commentary* 16 (Jan., 2016)).

²⁷⁷ "Developing Effective Counter-Narrative Frameworks for Countering Violent Extremism," *Hedayah: The International Center of Excellence for Countering Violent Extremism (CVE)*, and *The International Centre for Counter-Terrorism – the Hague*, Meeting Note (Sep., 2014). Available at: https://www.dhs.gov/sites/default/files/publications/Developing%20Effective%20Counter-Narrative%20Frameworks_1.pdf, 2.

²⁷⁸ Alex P. Schmid, *Challenging the Narrative of the 'Islamic State'* (The Hague: International Centre for Counter-Terrorism, 2015); David S. Sorenson, "Confronting the 'Islamic State': Priming Strategic Communications: Countering the appeal of ISIS," *Parameters* 44(3) (2014): pp. 25-36; Milo Comerford and Rachel Bryson, *Struggle Over Scripture: Charting the Rift Between Islamist Extremism and Mainstream Islam* (London: Tony Blair Institute for Global Change, 2017); "Developing Effective Counter-Narrative Frameworks," 2; Brahma Chellaney, "The Global War on Terrorism Has Failed. Here's How to Win," *Foreign Policy*, dated May 11 2019. Accessed October 15 2019. Available at: <https://foreignpolicy.com/2019/05/11/the-global-war-on-terrorism-has-failed-heres-how-to-win/>; H. A. Hellyer, "Al-Azhar and the battle of ideas against extremist Islamism," *Atlantic Council*, dated September 18 2017. Accessed October 8 2018. Available at: <https://www.atlanticcouncil.org/blogs/menasource/al-azhar-and-the-battle-of-ideas-against-extremist-islamism/>; Claire Meadows, "The Key To Defeating Islamic Extremism Is Tackling Its Ideology," *Huffington Post*, dated August 20 2017. Accessed October 8 2018. Available at: https://www.huffingtonpost.co.uk/clairelouise-meadows/the-key-to-defeating-islam_b_17773238.html; and Bendaoudi Abdelillah, "After the 'almost 100 percent' Defeat of ISIS, What about its Ideology?" *al-Jazeera*, dated May 8 2018. Accessed October 15 2019. Available at: <http://studies.aljazeera.net/en/reports/2018/05/100-percent-defeat-isis-ideology-180508042421376.html>; Steven R. Corman, "Weapons of Mass Persuasion: Communicating Against Terrorist Ideology," *Connections* 5(3) (Winter 2006), 95; and Kurt Braddock & John Horgan, "Towards a Guide for Constructing and Disseminating Counternarratives to Reduce Support for Terrorism," *Studies in Conflict & Terrorism* 39(5) (2016), 390.

- 5) *Movement discrediting*: seeking to discredit the movement itself so that vulnerable individuals will see its ‘true colours’ (e.g., its dishonesty, hypocrisy, cruelty, self-servitude, etc.) and not be duped into seeing it as a noble actor²⁷⁹. Alternatively, mockery is deployed to prevent self-actualisation seekers viewing the movement as ‘cool’, ‘badass’, or heroic²⁸⁰.
- 6) *Establishment feting*: challenging the ideology’s attacks on the establishment, either by directly refuting its claims or by feting the superior values of the establishment (the rule of law, individual and civil liberties, democracy, mutual respect, tolerance, free speech, opportunity for all, human rights, etc.) over those of the ‘extremists’ (which are conceptualised as being the opposite/negation of the establishment’s values)²⁸¹.
- 7) *Enemy humanisation*: humanising those groups depicted as villains by the ideology by portraying them in a positive light, emphasising similarities/commonalities between the ingroup and the outgroup, etc²⁸².

²⁷⁹ Will McCants and Clinton Watts, *U.S. Strategy for Countering Violent Extremism: An Assessment* (Philadelphia: Foreign Policy Research Institute, December 2012), 2; Ingram, *A ‘Linkage-Based’ Approach*, 7; J.M. Berger, *Promoting Disengagement from Violent Extremism* (The Hague – International Centre for Counter-Terrorism, 2016), 6; Braddock and Horgan, “Towards a Guide, 389; and Clint Watts, “Countering ISIL’s Ideology: Keep It Limited, Focused, and in Tune with Lessons Learned,” Foreign Policy Research Institute Statement submitted for the conference “Taking the Fight to ISIL: Operationalizing CT Lines of Effort Against the Islamic State Group” *Washington Institute for Near East Policy* (Feb., 2015). Available at: <https://www.washingtoninstitute.org/uploads/Documents/other/WattsStatement20150202.pdf>, 2-3.

²⁸⁰ “Developing Effective Counter-Narrative frameworks,” 2; Ahmed Al-Rawi, “Anti-ISIS Humor: Cultural Resistance of Radical Ideology,” *Politics, Religion & Ideology* 17(1) (2016), 52 and 67; Dean Obeidallah, “Middle East Goes Monty Python on ISIS,” *The Daily Beast*, dated July 12 2017. Accessed October 16 2019. Available at: <https://www.thedailybeast.com/middle-east-goes-monty-python-on-isis>; and Jenna McLaughlin, “The Case for Making Fun of ISIS,” *Mother Jones*, dated March 6 2015. Accessed October 16 2019. Available at: <https://www.motherjones.com/politics/2015/03/snl-dakota-johnson-isis-middle-east-satirical-cartoons/>

²⁸¹ “CONTEST,” 23; HM Government, “Counter-Extremism Strategy,” 7; “FACT SHEET: U.S. State Department,”; “National Strategy for Counterterrorism, June 2011,” 10; The Rt. Hon David Cameron, “Oral statement to Parliament: PM’s statement to Parliament on opposition to ISIL terrorism,” *Prime Minister’s Office, 10 Downing Street*, dated September 3 2014. Accessed February 2 2020. Available at: <https://www.gov.uk/government/speeches/pms-statement-to-parliament-on-opposition-to-isil-terrorism>; Dearden, “David Cameron extremism speech,”; “Prevent Strategy,” 5.

²⁸² McCants and Watts, *U.S. Strategy*, 2; Braddock and Horgan, “Towards a Guide,” 391.

- 8) *Reality checking*: emphasising the harsh reality of life with the movement to discourage those who might join it out of longing for self-actualisation (e.g., adventure, respect, purpose, belonging, etc.)²⁸³.

Since 2005 – and much accelerated in response to the more recent IS threat – RVE has institutionalised across much of the globe. With the UK’s *PREVENT* strategy setting the standard, the number of countries establishing C/PVE programmes based on the RVE logic has sky-rocketed²⁸⁴, largely in response to globalising initiatives such as those led by US President Obama in 2015²⁸⁵ and the UN in 2014²⁸⁶, 2016²⁸⁷ and 2017²⁸⁸.

As noted, for Western governments, RVE satisfies the traditional establishment-normative impulse to avoid contemplating any potential culpability from provocative policies or societal injustices by “shifting the public discussion away from Western meddling in the Muslim world to Islamist meddling with Muslim youth in the West”²⁸⁹ and depicting stated grievances as figments conjured in the minds of the psychologically fragile or intolerant/totalitarian, and not shared by the ‘properly functioning’, civic-minded majority²⁹⁰. Similarly, for

²⁸³ Watts, “Countering ISIL’s Ideology,” 3; Berger, *Promoting Disengagement*, 7; Beutel, et al., “Field Principles,” 40.

²⁸⁴ A 2017 US State Department survey found that 88% of the 84 countries reviewed had established, in some shape or form, *Preventing/Countering Violent Extremism* [P/CVE] programmes based on the logic of RVE (Caitlin Ambrozik, “Countering Violent Extremism Globally: A New Global CVE Dataset,” *Perspectives on Terrorism* 13(5) (Oct. 2019), 104).

²⁸⁵ In February 2015, Obama convened a three-day ‘CVE summit’ in the White House, attended by representatives of nearly 70 countries, which was followed in September by a high-level meeting on the side lines of the UN General Assembly involving 100 countries. The summit is following meeting sought to formalise and coordinate global CVE efforts. See: Office of the Press Secretary, “FACT SHEET: The White House Summit on Countering Violent Extremism,” *The White House*, dated February 18 2015. Accessed February 1 2020. Available at: <https://obamawhitehouse.archives.gov/the-press-office/2015/02/18/fact-sheet-white-house-summit-countering-violent-extremism>; Frazer and Nünlist, “The Concept of Countering Violent Extremism,” 1.

²⁸⁶ The UNSC issued a number of resolutions throughout 2014 in response to the IS threat, urging member states to institute CVE programmes. See: Ambrozik, “Countering Violent Extremism Globally,” 102.

²⁸⁷ In 2016 UN Secretary General Ban Ki Moon announced the “UN Plan of Action to Prevent Violent Extremism.” See: Frazer and Nünlist, “The Concept of Countering Violent Extremism,” 1.

²⁸⁸ UNSC Resolution 2396 reiterated previous calls for CVE programmes, particularly efforts to counter IS’ ideology. See Daniel Koehler and Verena Fiebig, “Knowing What to Do: Academic and Practitioner Understanding of How to Counter Violent Radicalization,” *Perspectives on Terrorism* 13(3) (Jun., 2019), 44.

²⁸⁹ Alex P. Schmid, “Research on Radicalisation: Topics and Themes,” *Perspectives on Terrorism* 10(3) (Jun., 2016), 26.

²⁹⁰ In that the different between those holding ‘extremist’ beliefs and those who do not is that the latter are sufficiently well educated and integrated. See: Frank Furedi, “Exploding the myth of radicalisation,” *Spiked*, dated June 16 2015. Accessed September 30 2019. Available at: <https://www.spiked-online.com/2015/06/16/exploding-the-myth-of-radicalisation/>; and William

authoritarian regimes in Muslim-majority countries, RVE enables them to deflect attention away from their own failures and provocations by depicting Islamist IV as a matter of personal frailty and/or religious bigotry, against which they constitute a bulwark as promoters of ‘moderate’ Islam or secularism²⁹¹. For Muslim communities, RVE initially appeared a welcome reprieve from the overt Islamophobia of the early GWOT, rehabilitating ‘mainstream’ Islam and redirecting blame onto a deviant ‘extremist’ fringe (although profiling of Muslim communities under RVE-inspired policies has since provoked complaints that government distinctions between ‘moderate’ and ‘extremist’ Muslims are highly arbitrary and in fact function to stigmatise Muslim religious expression and silence Muslim political expression²⁹²). Finally, the highly contentious nature of early GWOT discourses affected an ‘Overton window’ shift, whereby RVE was able to gain broad acceptance amongst many academics, journalists, etc., purely on account of its relative banality vis-à-vis the conventional wisdom(s) it replaced²⁹³. With RVE thus ensconced at the governmental level, it has been further reified among academics via several dynamics. Firstly, the institutionalisation of RVE means that, often, even critical work finds itself bound to working within its framework (either through institutional/funding constraints²⁹⁴, a wish to speak the

Stephens and Stijn Sieckelink, “Being resilient to radicalisation in PVE policy: a critical examination,” *Critical Studies on Terrorism* (2019), 7.

²⁹¹ Kundnani and Hayes, *The globalisation of Countering Violent Extremism policies*, 3; Anelle R. Sheline, “Declaration Proliferation: The International Politics of Religious Tolerance,” *Berkley Forum*, dated July 11 2019. Accessed August 14 2020. Available at: <https://berkeleycenter.georgetown.edu/posts/declaration-proliferation-the-international-politics-of-religious-tolerance>; Eric Rosand, “In strategies to counter violent extremism, politics often trump evidence,” *Brookings*, dated May 6 2019. Accessed February 1 2020. Available at: <https://www.brookings.edu/blog/order-from-chaos/2019/05/06/in-strategies-to-counter-violent-extremism-politics-often-trumps-evidence/>

²⁹² Kundnani, *A Decade Lost*, 29.

²⁹³ As noted in Kundnani, *The Muslims are coming!* Location 135.

²⁹⁴ My own cursory survey of UK and Canadian funding applications revealed such institutionalising practices. For example, the funding application brief for *Public Safety Canada* (Public Safety Canada, “Federal funding for research project to counter radicalization to violence,” *Government of Canada*, dated July 24 2018. Accessed July 19 2019. <https://www.canada.ca/en/public-safety-canada/news/2018/07/federal-funding-for-research-project-to-counter-radicalization-to-violence.html>) pre-ordained the acceptance and usage of RVE as a foundational research premise, pre-identified variables to be studied, pre-ordained a policing-based remedial strategy and pre-ordained a micro-centric research design. These same constraints also appeared in University of Manchester, “Major international project to research radicalisation & fundamentalism,” dated March 10 2017. Accessed July 19 2019. Available at: <https://www.manchester.ac.uk/discover/news/major-international-project-to-research-radicalisation--fundamentalism/>; and UK Home Office, “Radicalisation and terrorism prevention: apply for funding,” dated August 30 2016. Accessed July 19 2019. Available at: <https://www.gov.uk/government/news/radicalisation-and-terrorism-prevention-apply-for-funding>. For similar discussions on the usage of funding constraints to reify RVE, see: Kundnani, *The Muslims are coming!* Location 2208-2211; Marc Sageman, “The Stagnation in Terrorism

language of those they wish to advise, or a lack of awareness that other frameworks exist), thus continuing to reify (if confuse²⁹⁵) the paradigm. Additionally, open critics of RVE have occasionally faced intimidation, censure, or slander, both from fellow academics²⁹⁶ and government officials²⁹⁷. As chapter 3 will demonstrate, however, RVE – and the conservative paradigm more broadly – has proven insufficient for conceptualising and responding to recent real world IV threats – most notably IS.

1.3. Evaluating the conservative paradigm:

This explication and genealogical exploration equip us to evaluate and problematise the conservative paradigm, which I do on methodological, conceptual, empirical, and political grounds. While a number of informal methods are used in this evaluation, the specific value of the GA will become evident throughout as we unpick the less than social-scientific underpinnings of the paradigm and demonstrate how they can wrong-foot otherwise laudable research premised upon it. I focus chiefly on the RVE iteration which has, through a quasi-Kuhnian process of scientific ‘evolution’, abrogated its predecessors. Nevertheless, an appreciation for the broader historical development of the paradigm is key to my critique.

Research,” *Terrorism and Political Violence* 26(4) (2014), 566; and Sedgwick, “The Concept of Radicalization,” 480.

²⁹⁵ E.g., in the aforementioned cases where scholars insist upon the causal necessity of grievances but are corralled for various reasons into attempting to shoehorn such assertions into the RVE framework, etc.

²⁹⁶ For example, Jackson notes a critical review of his own 2009 *Critical Terrorism Studies* edited volume by RVE scholar Schmid, who attacked the volume by suggesting its authors were sympathetic to terrorists, castigating them for being “strangely silent about the worldview of those terrorists who have no self-doubts and attack the Red Cross, the United Nations, NGOs and their fellow Muslims with equal lack of scruples” and suggesting that *Critical Terrorism Studies* scholars “should be the first on the barricades against jihadists.” Reflecting more broadly on the experience of critical scholars, Jackson paraphrased Der Derian to lament that “to gain official entry into the terrorist debate one must check critical weapons at the door, and join the chorus of [ritual moral] condemnation”. See: Richard Jackson, “Unknown knowns: the subjugated knowledge of terrorism studies,” *Critical Studies on Terrorism* 5(1) (2012), 19.

²⁹⁷ For example, in 2018, then UK Home Secretary Sajid Javid provoked fury when he suggested that scholars and civil society organisations critical of PREVENT were using false information to ‘turn people away’ from PREVENT, and were essentially “on the side of the extremists.” See: Jennifer Philippa Eggert, “There must be space for criticism: Why Sajid Javid’s attack on critics of Prevent is deeply concerning,” *London School of Economics Blog*, dated December 14 2018. Accessed September 22 2019. Available at: <https://blogs.lse.ac.uk/religionglobalsociety/2018/12/there-must-be-space-for-criticism-why-sajid-javids-attack-on-critics-of-prevent-is-deeply-concerning/>

Before commencing the critique, it is important to acknowledge five key (ostensible) strengths of the paradigm which, as chapters 2 and 3 will make clearer, has made the paradigm (particularly RVE) seemingly indispensable - vis-à-vis its rival progressive paradigm – for scholars and policymakers attempting to make sense of the phenomenon:

Firstly, it possesses a convincing internal logic, with a strong and intuitive path dependency running through its foundational assumptions. It provides a solid integrative framework into which new findings can be easily interpreted and incorporated, and (micro-level²⁹⁸) lacunae can be easily and clearly identified and problematised.

Secondly, it appears to explain the strong affective aspects of IV, an enigma typically viewed as vital to understanding both the extreme violence, commitment, and resistance to compromise and negotiation exhibited by many perpetrators of IV. Moreover, the ‘vulnerability’ profiles upon which it rests appear highly-intuitive, it being easy to imagine such ‘shortcomings’ as deficient critical thinking skills, closed-minded/intolerant cognitive styles, or a search for self-actualisation leading one to embrace ideologies/movements that seem baffling and abhorrent to most individuals studying them.

Thirdly, it appears to adequately explain why only a few individuals turn to IV, while so many others who share their stated grievances do not. This in turn engenders actionable, short-term remedial repertoires that can focus on identifying ‘likely suspects’ rather than fixing complex societal defects, making it highly attractive to both politicians seeking quick and visible gains, and practitioners seeking actionable strategies.

Fourthly, it builds upon seemingly robust empirical primary observations (regarding the dominant IV imaginary at each point in time), not only establishing ostensibly robust problematisations of the issue, but also compelling solutions to the causality ‘black boxes’ that emerge from it.

Finally, it’s *ideological persuasion logic* appears to rest upon something of an ontological tautology, in that, in order for violence to be ideological, an ideology must be present. Thus, manifestation and causation easily become conflated.

²⁹⁸ As we will see below, the paradigm’s ‘blindness’ towards macro-lacunae is a huge limitation.

Despite these strengths and the broad acceptance they have engendered, however, the conservative paradigm – and particularly RVE – has faced substantial criticism both internal and external to the field. I consider these extant criticisms – augmented by my own – over the remainder of this chapter.

1.3.1. Methodological problematisation:

From my GA, we can identify several methodological issues in the way the conservative paradigm has arrived at and reified its foundational assumptions:

1.3.1.1. *Reliance on deductions from establishment ideology-normative positions:*

Conservative paradigm iterations have routinely reflected contemporary establishment ideology ontological assumptions. For example, between c. 1848-1930, the irrationality of socialist/labour agitation was held as self-evident based on the prevailing establishment ideology's meritocratic, social Darwinist underpinnings, while early-GWOT/RVE assumptions on the irrationality of Islamist ideologies results at least in part from western post-enlightenment and orientalist secular-humanist biases²⁹⁹. More generally, each iteration assumes that the establishment ideology out of which it emerged is just, rational, and common-sensical, and thus naturally appealing and unproblematic to the rational mind. Such positions naturally lead one to assume that ideologies must be irrational and repulsive to the rational mind. It is from these ideological convictions – rather than empirical enquiry – that the conservative paradigm acquires its foundational assumptions, and its resulting discounting of macroscopic conditions or stated grievances and emphasising of manipulation of the 'vulnerable' by the diabolical³⁰⁰.

1.3.1.2. *Informed by deductions from superficial/selective empirical observations and failure to countenance compound/complex causation:*

²⁹⁹ See below.

³⁰⁰ As we discuss below, the irrationality and abhorrence of ideologies leads one to assume that ideology founders, cadres, and recruiters must be insincere Machiavellians using ideologies as foils to dupe the vulnerable into become unwitting foot soldiers for their own diabolical, self-serving ends. We have already seen how this was explicit in much of the conservative paradigm writings of the post-French Revolutionary and anti-communist eras.

Conservative paradigm iterations have frequently based their foundational assumptions on simplistic and selective deductions, in which superficially convincing sweeping empirical observations are cited to discount particular variables (typically macroscopic injustices and stated grievances) through a process of naïve falsification that fails to consider compound/complex causation (for example, RVE's discounting of macroscopic grievances because only a minority of those enduring such grievances turn to IV or ideologies/movements, or post-French Revolutionary reactionism's discounting of grievances because the upheavals spread beyond the local grievance context). The poverty of such approaches is illustrated by the internal debates often witnessed between scholars citing different, conflicting choice observations. For example, during the 1990s/early GWOT, different conservative sub-paradigms clashed because, while some scholars claimed Islamist IV to be a product of Islam because most terrorists were (allegedly) Muslims, others claimed it to be a product of Arab culture, because many non-Arab Muslim societies had established functioning democracies³⁰¹. Problems increase when iterations/sub-paradigms based on these selective, contextually-bounded observations are generalised beyond those contexts, inevitably faltering as new IV contexts or imaginaries emerge which do not fit within those contextually-bounded observations; as exemplified by the early-GWOT's struggle to define a consistent, unified IV 'imaginary', and the following problem of domestic Islamist IV which required a whole new iteration (RVE) to accommodate. Conservative paradigm iterations thus have short shelf lives, often requiring new iterations for each new IV threat.

1.3.1.3. *Non-academic institutionalisation/reification:*

As demonstrated, the conservative paradigm achieved its hegemonic status primarily via non-academic dynamics of institutionalisation and reification. We have seen throughout how governments and other establishment ideology-defenders have led the way in institutionalising the paradigm and discouraging research under rival paradigms, as well as the significant influence of establishment ideology ontological assumptions and/or broader cultural pre-occupations/moral panics in shaping the way IV threats are understood.

³⁰¹ These duelling deductions are broken down in Khan, "Five American perspectives on Islam".

In addition to these paradigm-*building* issues, the conservative paradigm promotes several methodological frailties liable to confuse or mislead *further* research built upon its foundational assumptions. Notably:

1.3.1.4. *Emphasis on microscopic inquiry fraught with data acquisition and interpretation issues:*

The conservative paradigm's preoccupation with microscopic variables (considering the mental state/personal motivations/dispositions/circumstances of the individual to be the primary/exclusive unit of analysis) renders paradigm adherents are overly reliant on interview-based research designs as they seek to identify the motives, mindsets, and circumstances driving the IV perpetrator. While valuable³⁰², *Terrorism Studies* researchers have long noted the vulnerabilities of such designs:

Firstly, many studies have struggled to meet routine social-scientific standards for such research, with a lack of actual primary data acquisition³⁰³ being compensated for by 1) consulting secondary material, often recycling their findings and even conclusions³⁰⁴; and 2) speculative theorising built upon untested theories³⁰⁵ or intuitive – even disgust-driven – assumptions³⁰⁶. This has produced an echo-chamber that recycles, reproduces, and reinforces – rather than methodically tests - untested assumptions³⁰⁷.

³⁰² Assuming the paradigm driving the interpretation and integration of findings is sound – see below.

³⁰³ Alex P. Schmid, "The literature on terrorism," in *The Routledge Handbook of Terrorism Research*, ed. Alex P. Schmid (London: Routledge, 2011), 461; Bart Schuurman & Quirine Eijkman, *Moving Terrorism Research Forward: The Crucial Role of Primary Sources* (The Hague – The International Centre for Counter-Terrorism, June 2013), 1-3; Bart Schuurman, "Research on Terrorism, 2007–2016: A Review of Data, Methods, and Authorship," *Terrorism and Political Violence* (2018), 1-2; Harmonie Toros, "Terrorists, scholars and ordinary people: confronting terrorism studies with field experiences," *Critical Studies on Terrorism* 1(2) (2008), 279; John Horgan, "Interviewing the terrorists: reflections on fieldwork and implications for psychological research," *Behavioral Sciences of Terrorism and Political Aggression* 4(3) (2012), 196; Jeroen Gunning, "A Case for Critical Terrorism Studies?" *Government and Opposition* 42(3) (2007), 366; Githens-Mazer, "The rhetoric and reality," 558; and Lorne L. Dawson, et al., "Talking to Foreign Fighters: Socio-Economic Push versus Existential Pull Factors," *TSAS working paper*, July 2016. Available at: https://www.tsas.ca/wp-content/uploads/2018/02/TSASWP16-14_Dawson-Amarasingam-Bain.pdf, 6.

³⁰⁴ Schmid, "The literature on terrorism," 460.

³⁰⁵ Schuurman and Eijkman, *Moving Terrorism Research*, 3; and Horgan, "Interviewing the terrorists," 196.

³⁰⁶ Silke, "Cheshire-cat logic."

³⁰⁷ Adam Dolnik, "Conducting Field Research on Terrorism: a Brief Primer," *Perspectives on Terrorism* 5(2) (2011), 5; Schmid, "The literature on terrorism," 460; Ariel Merari, "Academic research and government policy on terrorism," *Terrorism and Political Violence* 3(1) (1991), 95; Githens-Mazer, "The rhetoric and reality," 559.

Secondly, acquiring primary data can be a methodological minefield. Sampling bias often results from the scarcity of accessible and willing interviewees³⁰⁸ alongside small, opportunistic, or selective samples³⁰⁹; the limitations of which have been revealed by the contradictory results yielded by such studies³¹⁰. Meanwhile, doubts exist over the likely sincerity or reliability of many respondents, owing to issues of interviewer-interviewee trust³¹¹; interviewee attempts to paint their actions/attitudes in a noble light³¹²; or the danger that the interviewee's current views may colour their memory of past views (e.g., describing their initial motivation for joining the movement in ideological terms when, potentially, they only developed that ideological motivation at a later date, etc.)³¹³.

Equally fraught are issues of data interpretation and integration, which comes back to my broader point on the danger of taking as granted foundational assumptions that have not been methodologically-derived (the risk being that methodologically-rigorous research, when built upon methodologically-dubious foundational assumptions, risks reifying a strawman). As noted, IV paradigms dictate what questions are asked, what answers are looked for, and how those answers – and omissions – are interpreted and integrated into the broader evolving body of knowledge. RVE – with its attendant ideologically-loaded nomenclature of 'extremism' (see below) – influences data interpretation

³⁰⁸ Which can lead to opportunistic sampling techniques, producing samples of dubious or unclear generalisability/representativeness. See: Dolnik, "Conducting Field Research," 29; Andrew Silke, "The Devil You Know: Continuing Problems with Research on Terrorism," *Terrorism and Political Violence* 13(4) (2001), 8; Merari, "Academic research," 93; and James Khalil, "A Guide to Interviewing Terrorists and Violent Extremists," *Studies in Conflict & Terrorism* (2017), 25.

³⁰⁹ E.g., limited to certain ideologies/imaginaries; locations; whether or not they were repentant or still engaged, imprisoned or free, still 'radicalising' or veteran 'extremists', etc. See: John Horgan, "Interviewing the terrorists," 200; Olsen, "Roads to militant radicalization," 13; and Todd C. Helmus, "Why and How Some People Become Terrorists," in *Social Science for Counterterrorism: Putting the Pieces Together*, eds. Paul K. Davis and Kim Cragin (Santa Monica, CA: RAND Corporation, 2009), 73. More generally on this point, see: Schmid, *Radicalisation, De-Radicalisation*, 25; Jonathan Githens-Mazer, "Causal Processes, Radicalisation and Bad Policy: The Importance of Case Studies of Radical Violent Takfiri Jihadism for Establishing Logical Causality," *APSA 2009 Toronto Meeting Paper* (Aug. 2009). Available at: https://papers.ssrn.com/Sol3/papers.cfm?abstract_id=1451634, 5.

³¹⁰ Alex Mintz and David Brule, "Methodological Issues in Studying Suicide Terrorism," *Political Psychology* 30(3) (2009), 365.

³¹¹ Marco Nilsson, "Interviewing Jihadists: On the Importance of Drinking Tea and Other Methodological Considerations," *Studies in Conflict & Terrorism* 41(6) (2018), 429.

³¹² Silke, "The Devil You Know," 8; Horgan, "Interviewing the terrorists," 201; and Olsen, "Roads to militant radicalization," 8.

³¹³ Schuurman and Taylor, "Reconsidering Radicalization," 4; Horgan, "Interviewing the terrorists," 201; and Helmus, "Why and How," 73.

particularly perniciously. By assuming all individuals involved in IV/endeared to an ideology/movement are of a certain, distinct mindset - either that of the 'vulnerable' youth led astray, the psychologically-unfulfilled 'loser' lashing out at innocent bystanders, or the psychologically-intolerant 'fundamentalist' killing on command – RVE has created a “folk-devil” caricature of the Islamist IV perpetrator, reducing them to simplistic, two-dimensional “deviants [...] stripped of all favourable characteristics and imparted with exclusively negative ones [...] typecast [as extremists] [...] through which [they] and [their] behaviour are visualized and explained, motives are imputed, causal patterns are searched for and the behaviour is grouped with other behaviour thought to be of the same order³¹⁴”. In this way, RVE scholars are predisposed to interpret interviewee responses in a certain way. For example, when a study of European IS volunteers found that respondents steeped their discourse in religious terminology, the researchers interpreted this as evidence of likely religious motivation (*à la obediently violent sub-paradigm*), while – as we will see in the next chapter – progressive paradigm scholars might just so easily interpret it as evidence of *post facto rationalisation*³¹⁵.

Ultimately, then, if the paradigm informing data collection, interpretation, and integration is flawed, then no amount of sampling rigour and interviewee sincerity will shine much further light on the causation of IV.

1.3.1.5. *Emphasis on ahistorical microscopic inquiry blinds researchers to concealed lacunae and challenging empirical observations:*

Finally, the conservative paradigm's ahistorical focus on individuals – with its preordained range of assumed variables – encourages a degree of *Dunning-Kruger Syndrome*, in that it blinds us to important and often challenging causal variables and mechanisms that become obvious upon adopting a historical and/or macro-lens (as I began to note in the case-selection section of the

³¹⁴ Cohen, *Folk Devils*, 37, 4 & 76.

³¹⁵ To the credit of the cited scholars, they did caveat their conclusions by acknowledging the possibility of these responses signposting a more *post facto rationalisation* type dynamic (“we recognize the grounds for exercising caution [...] People are inclined to remember, interpret, and present their past in ways that justify or reinforce their present commitments”) but nevertheless affirmed that they found it highly unlikely. While they should be credited for their reflexivity in this instance, the uncertainty alone is a further testament to the issues of data interpretation already outlined. See: Lorne L. Dawson & Amarnath Amarasingam, “Talking to Foreign Fighters: Insights into the Motivations for Hijrah to Syria and Iraq,” *Studies in Conflict & Terrorism* 40(3) (2017), 203.

introductory chapter). I discuss this in greater detail in our empirical problematisation below.

1.3.2. Conceptual problematisation:

These methodological woes are compounded by numerous conceptual issues liable to confuse research at the levels of research design and data interpretation and integration. This is because key concepts used in RVE are non-academic in origin: ‘Radicalisation’³¹⁶, ‘Vulnerability’³¹⁷ and ‘Resilience’³¹⁸ originate in policy discussions from the 2000s, while ‘Extremism’ has historically been a slur used to discredit political opponents³¹⁹. Because RVE-scholarship is policy-oriented, even those conscious of these frailties are pressured to adopt the language of those they wish to influence, but this has meant embracing terms and concepts for which there exists scant definitional clarity or consensus³²⁰, and an utter lack of agreed, social-scientificallly-developed guidance as to how such terms should – or even *can* – be operationalised so that they might be analytically useful³²¹.

³¹⁶ The term ‘radicalisation’ first emerged heuristically in a 2004 EU policy document, and an expert group commissioned by the *European Commission* shortly after cautioned against using a term that was so inherently problematic and ambiguous. However, the term gathered momentum as policymakers sought explanations for the threat of ‘home-grown’ terrorism demonstrated by the 2004 Madrid and 2005 London terrorist attacks – see: Shandon Harris-Hogan & Kate Barrelle, “Assisting practitioners to understand countering violent extremism,” *Behavioral Sciences of Terrorism and Political Aggression* 8(1) (2016), 1; Coolsaet, ‘*All Radicalisation is local*, 5; and Kundnani, “Radicalisation,” 4.

³¹⁷ According to O’Donnell, the term was transposed as a medical metaphor by policymakers relying on outdated metaphors of ideological ‘contagion’. See: O’Donnell, “Contagious ideas,” 985.

³¹⁸ According to Dalgaard-Nielsen and Schack, the term ‘resilience’ originated in policy discussions over constructing counter-extremism policies. See: Anja Dalgaard-Nielsen and Patrick Schack, “Community Resilience to Militant Islamism: Who and What?: An Explorative Study of Resilience in Three Danish Communities,” *Democracy and Security* 12(4) (2016), 310.

³¹⁹ The lexical history of the term is discussed in detail in Uwe Backes, *Political Extremes: A conceptual history from antiquity to the present* (London and New York: Routledge, 2010). Other scholars to have made this point in direct criticism of the RVE paradigm include: Minerva Nasser-Eddine, et al., *Countering Violent Extremism (CVE) Literature Review* (Canberra: Australian Government, Department of Defence March 2011), 16; Kundnani, *The Muslims are coming!* Location 1270; Andrej Sotlar, “Some problems with definition and perception of extremism within society,” *National Criminal Justice Reference Services* (2004), 1; and Schmid, *Radicalisation, De-Radicalisation*, 10.

³²⁰ Sedgwick, “The Concept of Radicalization,” 479; Githens-Mazer, “The rhetoric and reality,” 588; Schmid, *Radicalisation, De-Radicalisation*, 1 and 5-7; Alar Kilp, “The ontology and epistemology of extremism,” *ENDC Proceedings* 14 (2011), 10; Albert Breton, et al., “Introduction,” in *Political Extremism and Rationality*, eds. Albert Brenton, et al. (Cambridge: Cambridge University Press, 2002), xiii; Dalgaard-Nielsen and Schack, “Community Resilience,” 310.

³²¹ On the difficulty of operationalising ‘Ideology’, see: Tretheway, et al., “Out of Their Heads,” 3; and J.M. Berger, *‘Defeating IS Ideology’ sounds good, but what does it really mean?* (The Hague: International Centre for Counter-Terrorism, 2017). On ‘Radicalisation’, see: Githens-Mazer, “The rhetoric and reality,” 561; Sedgwick, “The Concept of Radicalization,” 479; Ariel Hessayon and David Finnegan, “Introduction: Reappraising Early Modern Radicals and Radicalisms,” in

These shortcomings are apparent in the literature, with many disputes stemming from a lack agreement or clarity as to what certain concepts mean or how they function³²², while many theories have rested on flimsy, superficial, or unclear assumptions because of failures to adequately define and conceptualise the concepts being studied³²³.

More dangerously, it can be argued that, by adopting these non-social-scientific terms with their respective ideological baggage, scholars find themselves relying on and thus perpetuating/reifying the non-academic,

Varieties of Seventeenth- and Early Eighteenth-Century English Radicalism in Context, eds. Ariel Hessayon and David Finnegan (London: Routledge, 2011), 6; and Schmid, *Radicalisation, De-Radicalisation*, 5. On 'Extremism', see: Jason-Leigh Striegher, "Violent-extremism: An examination of a definitional dilemma," *Proceedings of [the] 8th Australian Security and Intelligence Conference*, Edith Cowan University Joondalup Campus, Perth, Western Australia (2015), 75; Harris-Hogan & Barrelle, "Assisting practitioners," 2; Nasser-Eddine, et al., *Countering Violent Extremism*, 16; Kundnani, *A Decade Lost*, 26; and Sotlar, "Some problems," 1.

³²² Particularly illustrative are recent disputes over the wisdom or viability of supporting 'moderate' factions of the anti-Assad armed opposition movement in Syria. The failure to adequately operationalise what constitutes a 'moderate' vs. 'extremist' faction has resulted in conflicting claims as to which factions should be categorised in what way, and even whether a 'moderate' opposition exists at all. Particularly illustrative in this regard are the fierce debates that followed former UK PM David Cameron's November 2015 assertion that there existed 70,000 'moderate' rebels with which the Global Coalition could cooperate. Upon surveying the ensuing debates waged over the popular press, it becomes clear that confusion resulted as a result of the inability of commentators to reach a consensus understanding of what constituted a 'moderate'. Sengupta and Lister, both of whom supported Cameron's claim, defined moderates as those who have shown willingness to cooperate with the West (or its Arab allies), have track record of fighting against IS, are purely nationalist in their goals (i.e. not pursuing global jihad beyond Syria) and wish for a non-sectarian future Syria (Kim Sengupta, "David Cameron's '70,000 moderate rebels' are in Syria, the allies just need to direct them to take on Isis," *The Independent*, dated December 1 2015. Accessed October 6 2019. Available at: <https://www.independent.co.uk/voices/david-camerons-70000-moderate-rebels-are-in-syria-the-allies-just-need-to-direct-them-to-take-on-a6756386.html>); and Charles Lister, "Yes, there are 70,000 moderate opposition fighters in Syria. Here's what we know about them," *Spectator*, dated November 27 2015. Accessed October 5 2018. Available at: <https://blogs.spectator.co.uk/2015/11/yes-there-are-70000-moderate-opposition-fighters-in-syria-heres-what-we-know-about-them/>). In contrast those who dispute Cameron's claim define 'moderates' variously as: those who are not 'radical Islamists' [itself a disputed categorisation] (Jon Stone, "Many of David Cameron's 70,000 'moderate' Syrian fighters are actually radical Islamists, it is claimed," *The Independent*, dated December 1 2015. Accessed October 4 2018. Available at: <https://www.independent.co.uk/news/uk/politics/many-of-david-camerons-70000-moderate-syrian-fighters-are-actually-radical-islamists-it-is-claimed-a6756256.html>); or even, in the case of Robert Fisk, those who are entirely non-violent (Robert Fisk, "David Cameron, there aren't 70,000 moderate fighters in Syria - and whoever heard of a moderate with a Kalashnikov, anyway?" *The Independent*, dated November 29 2015. Accessed October 5 2018. Available at: <https://www.independent.co.uk/voices/david-cameron-there-arent-70000-moderate-fighters-in-syria-and-whoever-heard-of-a-moderate-with-a-a6753576.html>). Still others claimed it was impossible to ascertain which groups could be viewed as 'moderate' or 'extremists' as 1) individuals joined groups for rational rather than ideological reasons, 2) their word could not be trusted anyway, and 3) many would not even know what a 'moderate' pluralistic Syria would look like (Mowaffaq Safadi, "Don't rely on Syria's 'moderate' fighting force. It doesn't exist," *The Guardian*, dated December 16 2015. Accessed October 5 2018. Available at: <https://www.theguardian.com/commentisfree/2015/dec/16/dont-rely-syria-moderate-fighting-force-anti-isis>).

³²³ As will be demonstrated in Chapter 3, particularly with regard to the lack of consensus and clarity over the meaning of terms like "ideologically-motivated".

politically-charged 'folk devil' caricatures outlined above. Terms such as 'extremist', for, example, are wholly informed by such caricatures, prescribing as truisms assumptions on the characteristics of IV-perpetrators for which there remains no hard or consensual evidence, but substantial emotional stigma that is deeply entrenched in our cultural psyche. The perniciousness of the deleterious effects of the 'extremist' label is well attested by the response of many to the 'radicalisation' of the anti-Assad *Syrian Armed Opposition Movement* [SAOM] beginning in 2012. While the secular *Free Syrian Army* [FSA] were lauded as heroic revolutionaries³²⁴, Islamist factions were branded as violent 'extremists' who, according to the 'extremist' folk-devil construct, could not be trusted or negotiated with³²⁵. So entrenched was the stigma elicited by the 'extremist' label – coupled with entrenched stigmas against religious and especially Islamist ideologies (see below) – that such views were maintained even as substantial empirical evidence accumulated re-conceptualising such factions as ideologically-diverse, ambivalent, and nuanced in both origins³²⁶ and

³²⁴ Journalists set the tone here by imploring solidarity with the rebels, publishing human-interest pieces that humanised FSA fighters as a rag-tag citizens' army of bakers, electricians and shopkeepers backed by conscience-stricken military defectors, whose heroic courage, ingenuity and, above all, humanity, was constantly contrasted against the mechanised inhumanity of the tanks, bombers, and torturers who terrorised them to defend al-Assad's dictatorship. See, for example: Ivan Watson and Raja Razek, "Faces of the Free Syrian Army," *CNN*, dated July 27 2012. Accessed December 13 2019. Available at: <https://edition.cnn.com/2012/07/24/world/meast/northern-syria-violence/index.html>; Hugh Macleod and Annasofie Flamand, "Meet the Free Syrian Army," *PRI*, dated November 3 2011. Accessed December 19 2019. Available at: <https://www.pri.org/stories/2011-11-03/meet-free-syrian-army>; Jimmy Nsubuga, "Syrian rebels operate tank with PlayStation controller," *Metro*, dated December 10 2012. Accessed December 13 2019. Available at: <https://metro.co.uk/2012/12/10/syrian-rebels-operate-tank-with-playstation-controller-3310199/>; Ghazi Balkiz and Richard Engel, "The lives of Syrian rebels," *NBC News*, dated August 2 2012. Accessed December 13 2019. Available at: <https://www.nbcnews.com/slideshow/lives-syrian-rebels-48451856>; Richard Spencer, "Aleppo 'is becoming Syria's Stalingrad'," *The Telegraph*, dated August 11 2012. Accessed December 13 2019. Available at: <https://www.telegraph.co.uk/news/worldnews/middleeast/syria/9469080/Aleppo-is-becoming-Syrias-Stalingrad.html>; Richard Spencer, "Free Syrian Army is all that stands between civilians and tanks," *The Telegraph*, dated February 11 2012. Accessed December 13 2019. Available at: <https://www.telegraph.co.uk/news/worldnews/middleeast/syria/9076596/Free-Syrian-Army-is-all-that-stands-between-civilians-and-tanks.html>

³²⁵ See for example: Andrew McCarthy, "Meet Aleppo's 'Moderate,' 'Secular' 'Rebels': Al-Qaeda and the Muslim Brotherhood," *National Review*, dated August 19 2016. Accessed October 5 2018. Available at: <https://www.nationalreview.com/2016/08/aleppo-syria-moderate-secular-rebels-al-qaeda-muslim-brotherhood-russia-iran/>; Barak Barfi, "America's Dangerous Gamble with Rebels in Syria," *The National Interest*, dated October 8 2015. Accessed October 5 2018. Available at: <https://nationalinterest.org/feature/americas-dangerous-gamble-rebels-syria-14038>; and Ben Reynolds, "There are No Moderate Syrian Rebels," *Counterpunch*, dated October 3 2014. Accessed October 5 2018. Available at: <https://www.counterpunch.org/2014/10/03/there-are-no-moderate-syrian-rebels/>

³²⁶ Many having 'Islamised' superficially to attract Gulf funding – see: Adam Baczko, et al., *Civil War in Syria: Mobilization and Competing Social Orders* (Cambridge: Cambridge University Press, 2017), 181; Anne Marie Baylouny & Creighton A. Mullins, "Cash is King: Financial

membership³²⁷; while many of the groups' leaders sought actively to differentiate themselves from groups like AQ and IS by publicly pledging towards 'moderating' principles³²⁸. Such statements, which contradicted the folk-devil caricature of Islamist extremists conjured in the minds of pundits, were dismissed out-of-hand

Sponsorship and Changing Priorities in the Syrian Civil War," *Studies in Conflict & Terrorism* (2017), 2; Aron Lund, "Syrian Jihadism," *Swedish Institute of International Affairs* UI Brief 13 (September 2012), 18; Bassma Kodmani and Félix Legrand, "Empowering the Democratic Resistance in Syria," *Arab Reform Initiative* (Sep., 2013), 4; Christopher Phillips, *The Battle for Syria: International rivalry in the new Middle East* (New Haven and London: Yale University Press, 2018), 142; International Crisis Group, "Tentative Jihad: Syria's fundamentalist opposition," *ICG Middle East Report* 131 (October 2012), 5 and 10; Lina Khatib, et al., "Western Policy Towards Syria: Applying Lessons Learned," *Chatham House Research paper*, March 2017. <https://www.chathamhouse.org/sites/default/files/publications/research/2017-03-15-western-policy-towards-syria-lessons-learned.pdf>, 22; Robin Yassin-Kassab and Leila al-Shami, *Burning Country: Syrians in Revolution and War*, 2nd ed. (London: Pluto Press, 2018), 121; and Thomas Pierret, "Better Assad Than the Islamists? Why the 'Argument from Islamism' Is Wrong," in *The Syria Dilemma*, eds. Nader Hashemi and Danny Postel (Cambridge, Mass: The MIT Press, 2013), 250.

³²⁷ Many group members having previously been members of the FSA who professed to have joined Islamist groups for non-religious/ideological reasons and to still pursue pro-democratic goals. Specifically, most respondents reported that they had joined Islamist factions because 1) they had been alienated by the often corrupt and 'warlordish' behaviour of many FSA groups and impressed by the discipline and non-corruptness of Islamist groups (Aaron Y. Zelin, "Causes for Pause: Spoilers and Risks," in *Syria's Military Opposition: How Effective, United, or Extremist?* Eds. Jeffrey White, Andrew J. Tabler, and Aaron Y. Zelin (The Washington Institute for Near East Policy, Policy Focus 128, September 2013), 25; Phillips, *The Battle for Syria*, 131; Khatib, et al., "Western Policy," 24; Yassin-Kassab and al-Shami, *Burning Country*, 122; and Vera Mironova, et al., "Syria's Democracy Jihad: Why ISIS Fighters Support the Vote," *Foreign Affairs*, dated January 13 2015. Accessed October 5 2018. Available at: <https://www.foreignaffairs.com/articles/middle-east/2015-01-13/syrias-democracy-jihad>); 2) Islamist groups proved significantly better organised, supplied and more effective on the battlefield than their FSA equivalents (Baczko, et al., *Civil War in Syria*, 189; Khatib, et al., "Western Policy," 22; Vera Mironova, et al., "The Motivations of Syrian Islamist Fighters," *CTC Sentinel* 7(1) (Oct., 2014), 15; and Mironova, et al., "Syria's Democracy Jihad,"); and/or 3) Islamist groups provided better salaries for individuals wishing to provide for their families (Nikolas Van Dam, *Destroying a Nation: the civil war in Syria* (London: I.B. Tauris, 2017), 99).

³²⁸ For example, the May 2014 *Charter of Honour/Revolutionary Charter* which committed them to opposing 'extremism', respecting human rights, limiting military actions to within Syria, and providing justice and security for all Syrians regardless of ethnicity, gender or religious affiliation. See: Scott Lucas, "Syria Document: Insurgents issue 'Revolutionary Covenant'," *EA Worldview*, dated May 18 2014. Accessed October 4 2018. Available at: <https://eaworldview.com/2014/05/syria-document-insurgents-issue-revolutionary-covenant/>.

as lies and manipulation³²⁹, and evidence scrambled for that proved their true, unambiguous, unnuanced and monolithic ‘extremist’ nature³³⁰.

‘Extremism’ also lacks explication, often being used to mean two different things without clarification: On one hand, ‘extremist’ is used to describe a type of ideologies (e.g., “IS’ ideology is ‘extreme’”), which is ontologically messy as ‘extreme’ in this case can only be a relative and partisan designation, contrasted against what is considered ‘moderate’ or ‘centrist’, which is itself subjective and circumstantial. Other times, it is used to describe an attitude towards an ideology – contrasting ‘extremists’ who refuse all compromise with ‘pragmatists’ who may share the same ideology but be open to compromise, negotiation, etc., a usage less arbitrary and more operationalisable. The lack of clarity and consistency between usages only reinforces its arbitrariness, stigma, and analytical unwieldiness.

Equally problematically, the idea of ‘radicalisation’ arbitrarily assumes that coming to hold certain views (those deemed ‘extreme’, with all the above-noted ontological issues involved in that designation) requires/entails a fundamental change of consciousness or cognitive shift (i.e., it requires something to have ‘gone wrong’ in the thought-processes of the individual – a transition from ‘healthy’ to ‘pathological’, ‘rational’ to ‘irrational’). Such a notion, frequently taken as granted, seems bizarre when we generally understand ideas/opinions to be flexible, malleable, nuanced and, above all, a spectrum. Few would consider a former Labour voter who switched to the Conservative Party to have undergone

³²⁹ Alexander Decina, “Meet Syria’s Fake Moderates,” *The National Interest*, dated July 20 2015. Accessed October 5 2018. Available at: <https://nationalinterest.org/feature/meet-syrias-fake-moderates-13451>; McCarthy, “Meet Aleppo’s ‘Moderate,’ ‘Secular’ ‘Rebels’,”; Juan Cole, “How the Washington Post got Taken in by Syria’s Taliban,” *Informed Comment*, dated July 13 2015. Accessed October 3 2018. Available at: <https://www.juancole.com/2015/07/washington-syrias-taliban.html>; Max Abrahms, “Syria’s Extremist Opposition,” *Foreign Affairs*, dated October 30 2017. Accessed October 5 2018. Available at: <https://www.foreignaffairs.com/articles/middle-east/2017-10-30/syrias-extremist-opposition>; and Thomas Joscelyn, “Jihadists in Syria honor Mullah Omar, praise Taliban’s radical state,” *Long War Journal*, dated August 4 2015. Accessed October 5 2018. Available at: <https://www.longwarjournal.org/archives/2015/08/syrian-jihadists-honor-mullah-omar-praise-talibans-radical-state.php>

³³⁰ Usually by citing decontextualised instances of their military cooperation with perceivably ‘unambiguously extremist’ groups such as IS and Jabhat al-Nusra (Decina, “Meet Syria’s Fake Moderates,”; Barfi, “America’s Dangerous Gamble,”; Guido Steinberg, “Ahrar al-Sham: The “Syrian Taliban” al-Nusra Ally Seeks Partnership with West,” *Stiftung Wissenschaft und Politik Comments* 27 (May 2016), 4; Cole, “How the Washington Post got Taken in,”; and Abrahms, “Syria’s Extremist Opposition”); or selected ‘extremist’-sounding statements made by particular group members (Ben Hubbard, “In Syria, Potential Ally’s Islamist Ties Challenge U.S.,” *The New York Times*, dated August 25 2015. Accessed October 4 2018. Available at: <https://www.nytimes.com/2015/08/26/world/middleeast/ahrar-al-sham-rebel-force-in-syrias-gray-zone-poses-challenge-to-us.html>).

a psycho-cognitive-rupture. On what grounds can we consider one set of ideas anymore cognitively normative than another? At what point do we draw the line between different but still cognitively normative views and views requiring an altered state of consciousness to even be considered? When they are violent? When they are 'irrational' (another ontologically-shaky, ideologically-loaded assumption to make)? Etc. Thus, to assert that someone with 'extreme' views has somehow undergone a cognitive transformation – or has transitioned from the rational to the irrational, the healthy to the sick - is entirely arbitrary unless further research can prove otherwise.

1.3.3. Empirical problematisation:

As noted, because the conservative paradigm's foundational assumptions have been so heavily shaped and constrained by non-academic influences and contextually-bounded, often ahistorical, empirical observations, adherents have often been ignorant (wilfully or unwittingly) to the lack of empirical support for those assumptions, and the abundance of challenging evidence:

1.3.3.1. *Lack of evidence for foundational assumptions:*

Critical scholars note the flimsy evidence-base upon which conservative paradigm (particularly RVE) foundational assumptions are based. Scholars note the lack of evidence that *ideological persuasion* constitutes the root-cause of IV³³¹, alongside the lack of, or inconsistent, empirical support for proposed educational³³² and psychological³³³ 'vulnerability profiles'. This extends to the

³³¹ O'Donnell, "Contagious ideas," 983; Braddock and Horgan, "Towards a Guide," 383; Borum, "Radicalization into Violent Extremism I, 8; and Alastair Reed, "An Inconvenient Truth: Countering Terrorist Narratives – Fighting a Threat We Do Not Understand," *International Centre for Counter Terrorism – the Hague*, dated July 2 2018. Accessed September 17 2019. <https://icct.nl/publication/an-inconvenient-truth-countering-terrorist-narratives-fighting-a-threat-we-do-not-understand/>; Anne Aly, "The policy response to home-grown terrorism: reconceptualising Prevent and Resilience as collective resistance," *Journal of Policing, Intelligence and Counter Terrorism* 8(1) (2013), 8.

³³² One particularly scathing article argued that programmes ostensibly based on fostering critical thinking to increase the 'resilience' of 'vulnerable' individuals actually seek do the opposite, encouraging people to shed their critical thinking skills and accept the establishment ideology as blindly as they are supposedly in danger of blindly accepting the ideology: "respective solutions suspend critical thinking; people are not supposed to understand and critically reflect on ideas or their own situation but to think positively or buy into the ideals of the programs", see: Niklas Altermark and Hampus Nilson, "Crafting the 'Well-Rounded Citizen': Empowerment and the Government of Counter-radicalization," *International Political Sociology* 12(1) (Mar., 2018), 65.

³³³ Charlotte Heath-Kelly, "Counter-Terrorism and the Counterfactual: Producing the 'Radicalisation' Discourse and the UK PREVENT Strategy," *British Journal of Politics and International Relations* 15(3) (Aug., 2013), 397; and Crenshaw, "The Psychology of Terrorism," 410.

policy-realm, with concerns raised over the lack of empirical evidence for the validity of counter-ideology ('ideological replacement' and 'Ideology-discrediting')³³⁴ and/or 'resilience building' interventions³³⁵; a lacuna compounded by the lack of mechanisms available for measuring their success³³⁶. Due to the high degree of path-dependency in the conservative paradigm's causal logic, the falsification of any one of these claims would leave a gaping and destabilising hole in its foundational assumptions. For example, if IV causation cannot be attributed to *ideological persuasion*, then investigations into why ideologies/movements appeal to certain types of individuals become far less relevant, and the entire repertoire for mitigating against its occurrence becomes a futile attempt to treat a symptom rather than the cause.

1.3.3.2. *Abundance of contrary evidence:*

As noted, the conservative paradigm's focus on the microscopic and ahistorical blinds adherents to important lacunae and challenging trends:

1.3.3.2.1. Concealed lacunae:

Ahistoricism conceals empirical observations that, while microscopic variables are perennial, IV is not. Ideologies/movements often experience long periods of 'dormancy' where they are unable to garner popular followings. For example, despite the continuous existence of Salafist movements in Lebanon since the 1940s, the movement would not succeed in becoming a popular movement until the 2010s (see Chapter 7). Similarly, the same ideologies can have significantly

³³⁴ Andrew Glazzard, *Losing the Plot: Narrative, Counter-Narrative and Violent Extremism* (The Hague: International Centre for Counter-Terrorism, 2017), 1-5; Ann-Sophie Hemmingsen & Karin Ingrid Castro Møller, "Why counter-narratives are not the best responses to terrorist propaganda," *Danish Institute for International Studies*, dated February 10 2017. Accessed September 17 2019. Available at: <https://www.diis.dk/en/research/why-counter-narratives-are-not-the-best-responses-to-terrorist-propaganda>; Eric Rosand and Emily Winterbotham, "Do counter-narratives actually reduce violent extremism?" *Brookings Institute*, dated March 20 2019. Accessed September 17 2019. Available at: <https://www.brookings.edu/blog/order-from-chaos/2019/03/20/do-counter-narratives-actually-reduce-violent-extremism/>; Beutel, et al., "Field Principles," 36; Ann-Sophie Hemmingsen & Karin Ingrid Castro Møller, *The trouble with counter-narratives* (Copenhagen: Danish Institute for International Studies, 2017), 5-6; Alex P. Schmid, *Al-Qaeda's 'single narrative' and attempts to develop counter-narratives: the state of knowledge* (The Hague: International Centre for Counter-Terrorism, 2014), 1; and Reed, "An Inconvenient Truth."

³³⁵ Dalgaard-Nielsen and Schack, "Community Resilience," 310.

³³⁶ Daveed Gartenstein-Ross and Nathaniel Barr, "Fixing how we fight the Islamic State's narrative," *War on the Rocks*, dated January 4 2016. Accessed September 16 2019. Available at: <https://warontherocks.com/2016/01/fixing-how-we-fight-the-islamic-states-narrative/>; Reed, "An Inconvenient Truth,"; and Nasser-Eddine, et al., *Countering Violent Extremism*, 48.

differing fortunes in different locales, even those sharing similar cultural dispositions and permissive conditions³³⁷. This suggests that, if IV does result from *ideological persuasion* – and ideologies/movements do prey on the ‘vulnerable’ - we must still answer what causes those ideologies to ‘go viral’ when and where they do. Otherwise stated, while the ahistorical conservative paradigm asks “if IV results from macroscopic grievances, why don’t all the aggrieved engage in IV?”, a historicised exploration of IV begs the question “if IV results from microscopic maladjustment, why does IV occur/why do ideologies/movements only popularise at certain times/under certain macroscopic conditions?”.

1.3.3.2.2. Concealed challenging trends:

Ahistoricism similarly conceals empirical observations that, historically, we often witness multiple ideologies/movements competing to take ownership of the same cause, e.g., during the 1958 *Lebanese Crisis* (see chapters 6,7), the *Communist Party of Lebanon* [CPL] competed unsuccessfully against Nasserite *Pan-Arab Nationalism* to assume leadership of the Sunni/anti-establishment cause, etc.³³⁸ Such observations suggest that ideologies provide *post facto rationalisations* for existing discontent and rebellious intent, rather than manipulatively promoting them *ex nihilo* as the conservative paradigm assumes. Thus, as noted, ahistoricism in IV research encourages a kind of *Dunning-Kruger syndrome*, the absence of awareness of the historical and contextual ebb and flow of, and competition between, ideologies/movements leaving one content to seek causation in purely presentist, microscopic domains.

Ahistoricism also results in insufficient causal regression, in that, by focussing solely on why ‘vulnerable’ individuals are attracted to

³³⁷ Here the contrasting fortunes of different ideologies in the immediate post-colonial Middle East is instructive. For example, while in 1950s Egypt Islamists of the *Muslim Brotherhood* succeeded in establishing a mass movement, it had no such success in Lebanon, Syria, or Iraq. Conversely, while Communism struggled to garner a popular base during this period across most of the Middle East, it succeeded in mobilising millions across Iraq. Another example can be found in 19th century Europe: while in Germany, socialists succeeded in mobilising the largest mass movement in the country in the second half of the 19th century, heavily-proletarianized Britain failed to mobilise any significant socialist movement whatsoever during the same period.

³³⁸ Other examples include the competition between socialist and nationalist movements to take leadership of the revolutionary masses during the 1848 *European revolutions* (Explained particularly well in Rapport, 1848); the competition between Pan-Arab and Pan-Islamic movements for leadership of the 1925-1927 revolt against the French occupation of Syria (see Chapter 7); and, most recently, the contest between secular and Islamist factions to take ownership of the anti-Assad SAOM.

ideologies/movements, the conservative paradigm fails to conceptualise why ideologies/movements emerge in the first place. This both limits remedial repertoires to reactive interventions (rather than pre-empting the emergence of ideologies/movements in the first place) and blinds researchers to the motivations of a whole range of important actors, such as founding ideologues and early cadres who cannot easily be understood (or simply dismissed) as having created or joined the movement out of a search for community, respect, etc. As I expand upon in subsequent chapters, this can encourage unsubstantiated assumptions that ideology/movement architects and cadres are insincere, Machiavellian manipulators employing ideologies cynically to recruit unwitting foot soldiers for self-serving goals (à la the original post-French revolutionary conspiracy model and its descendants), rather than, potentially, individuals earnestly seeking programmes to correct pervasive injustices, however misguidedly.

Finally, the conservative paradigm's microscopic ethos – with its assumption of the exceptional nature of IV-perpetrators (as psychologically maladjusted minorities) – leaves it unable to comprehend mass movements, such as those seen in the ongoing conflict in Syria, where vast swathes of the population mobilise under specific ideologies/movements (a problem discussed in detail in Chapter 3). Moreover, it opens the door for opportunist actors – not least the al-Assad regime³³⁹ – to portray popular IV as the work of non-

³³⁹ Syrian President Bashar al-Assad has routinely exploited such delegitimising conservative paradigm conceptualisations of IV perpetrators to portray the SAOM as pathological, 'obediently violent' terrorists – divorced from any grievances and animated only by religious bigotry - against whom his regime serves as a buffer to the benefit of the rest of the world. See for example: "TRANSCRIPT: ABC's Barbara Walters' Interview With Syrian President Bashar al-Assad," *ABC News*, dated December 6 2011. Accessed April 5 2020. Available at: <https://abcnews.go.com/International/transcript-abc-barbara-walters-interview-syrian-president-bashar/story?id=15099152>; Reuters Staff, "Syria's Assad says duty to 'annihilate terrorists'," *Reuters*, dated April 28 2012. Accessed March 5 2020. Available at: <https://www.reuters.com/article/us-syria-crisis-assad-idUSBRE85R1D520120628>; Neil MacFarquhar and Andrew E. Kramer, "Syria Leader, in Rare TV Interview, Disparages Opponents," *The New York Times*, dated May 16 2020. Accessed April 5 2020. Available at: <https://www.nytimes.com/2012/05/17/world/middleeast/bashar-al-assad-in-rare-tv-interview-disparages-opponents-in-syria.html>; Max Fisher, "Five most bizarre quotes from Bashar al-Assad's new interview," *The Washington Post*, dated February 21 2013. Accessed April 5 2020. Available at: <https://www.washingtonpost.com/news/worldviews/wp/2013/02/21/five-most-bizarre-quotes-from-bashar-al-assads-new-interview/>; Ned Parker, "Syria's Bashar Assad warns 'terrorism' will come back to West," *Los Angeles Times*, dated April 17 2013. Accessed April 5 2020. Available at: <https://www.latimes.com/world/middleeast/la-xpm-2013-apr-17-la-fg-syria-assad-20130418-story.html>; Brian Resnick and National Journal, "How Bashar al-Assad rationalizes 'doing harm'," *The Atlantic*, dated September 18 2013. Accessed April 5 2020. Available at: <https://www.theatlantic.com/politics/archive/2013/09/how-bashar-al-assad-rationalizes-doing-harm/454125/>; Ian Black, "Bashar al-Assad is west's ally against Isis extremists, says Syria," *The Guardian*, dated July 14 2014. Accessed April 5 2020. Available at: <https://www.theguardian.com/world/2014/jul/14/bashar-al-assad-fighting-isis-western-ally->

representative ‘extremists’ and ‘terrorists’; erasing the objective grievances that sparked the IV and permitting purely military/policing solutions at best, and brutal repression at worst.

1.3.4. Political problematisation:

Finally, the conservative paradigm serves an inextricably pro-establishment agenda that delegitimises dissent as ‘deviant’ behaviour:

1.3.4.1. *Establishment-normative partisan agenda:*

Being so heavily shaped, constrained, and institutionalised by governments and other establishment ideology-defenders, many suspect the conservative paradigm to be a direct tool of those interests, deliberately shaping and constraining the way IV is understood to support pro-establishment agendas. Conservative paradigm research is usually policy-driven, rather than research driving policy. Githens-Mazer and Kundnani both note that RVE’s research agenda – including its foundational assumptions and the conceptualisations of key terms – has been predominantly set by governments who are themselves parties to the conflict under investigation³⁴⁰. RVE research is critiqued as being state-normative, protective of the *status quo*, and inherently damning of those who challenge it³⁴¹. Such allegations are lent credence by examining the ramifications of the conservative paradigm’s foundational assumptions:

Firstly, its assumption that IV results from *ideological persuasion* serves hegemonic purposes by erasing what might be legitimate grievances resulting from policy decisions in which Western governments are complicit³⁴². The very notion that embracing an ideology/movement constitutes an irrational, psychological process serves to separate the individual’s convictions and actions

[minister-claims](#); Zack Beauchamp, “In new interview, Bashar al-Assad demands America bomb his country harder,” *Vox*, dated December 3 2014. Accessed April 5 2020. Available at: <https://www.vox.com/2014/12/3/7326171/assad-interview-paris>;

³⁴⁰ Githens-Mazer, “The rhetoric and reality,” 557; Kundnani, *The Muslims are coming*, Location 2214.

³⁴¹ Gunning, “A Case for Critical Terrorism Studies?” 371-372; Githens-Mazer, “The rhetoric and reality,” 566; Schmid, *Radicalisation, De-Radicalisation*, 12; Jacob L. Stump and Priya Dixit, *Critical Terrorism Studies: An introduction to research methods* (Abingdon: Routledge, 2013), 15; and Joseba Zulaika & William A. Douglass, “The terrorist subject: terrorism studies and the absent subjectivity,” *Critical Studies on Terrorism* 1(1) (2008), 28.

³⁴² Glazzard, *Losing the Plot*, 6; Kundnani, *The Muslims are coming*, Locations 193 and 266; Gabe Mythen, et al., “Assembling and deconstructing radicalisation in PREVENT: A case of policy-based evidence making?” *Critical Social Policy* 37(2) (2017), 190; and Coolsaet, ‘*All Radicalisation is local*, 4.

from the realm of reality and rationality, delegitimising their grievances and actions and remodelling that individual as a mental patient in need of ‘curing’, rather than a political dissident whose beliefs and actions – while potentially misguided and inexcusable – might reflect important problems in society. This critique extends to the conservative paradigm’s fixation on ahistorical micro-causation and its construction of the ‘vulnerable’ individual and the ‘grooming’ recruiter. By searching for causation in the personal circumstances and dispositions of the individual recruit – or in the manipulatory methods of the recruiter - macroscopic conditions and historical legacies are ignored³⁴³. While this fixation on the micro encourages what Coppock and McGovern dub “the psychologisation of social problems,³⁴⁴” the construct of the ‘vulnerable’ individual constitutes what O’Donnell calls the “pathologizing of dissent³⁴⁵”. It denies agency and rationality to (and thus legitimacy to the grievances of) those engaging in IV by depicting them as victims of their own psychological and cognitive frailties³⁴⁶. Similarly, depicting those attracted to ideologies/movements as being unable to fulfil their psychological needs through ‘conventional’ avenues encourages us to look upon them as pathetic ‘losers’³⁴⁷ who irrationally project their own bitterness and insecurities to inflict collateral suffering on the innocent,

³⁴³ Gunning, “A Case for Critical Terrorism Studies,” 371.

³⁴⁴ Vicki Coppock and Mark McGovern, “‘Dangerous Minds’? Deconstructing Counter-Terrorism Discourse, Radicalisation and the ‘Psychological Vulnerability’ of Muslim Children and Young People in Britain,” *Children and Society* 28(3) (May 2014), 246.

³⁴⁵ O’Donnell, “Contagious ideas,” 989.

³⁴⁶ *Ibid*, 985; and Coppock and McGovern, “‘Dangerous Minds’,” 242.

³⁴⁷ Indeed, as noted in a previous footnote, this concept of the jihadist ‘loser’ has been jumped upon by media and demagogues such as then-Mayor of London Boris Johnson, who selectively quoted from an MI5 report to claim that “jihadis are porn-watching wankers” who struggle to interact with women and so vent their sexual frustration and low self-esteem by engaging in jihad (Frances Perraudin and Shiv Malik, “Boris Johnson: jihadis are porn-watching ‘wankers’,” *The Guardian*, dated January 30 2015. Accessed November 8 2019. Available at: <https://www.theguardian.com/politics/2015/jan/30/boris-johnson-jihadis-are-porn-watching-wankers>). See also: Frederick Forsyth, “Terrorism attracts failures and losers,” *Express*, dated March 31 2017. Accessed November 8 2019. Available at: <https://www.express.co.uk/comment/columnists/frederick-forsyth/786150/london-terror-attack-Terrorism-jihad-attracts-failures-losers-low-iq>; Phyllis Chesler, “Why are jihadis so obsessed with porn?” *New York Post*, dated February 17 2015. Accessed November 8 2019. Available at: <https://nypost.com/2015/02/17/why-are-jihadis-so-obsessed-with-porn/>; Peter Beinart, “What Trump reveals by calling terrorists ‘losers’,” *The Atlantic*, dated May 24 2017. Accessed November 8 2019. Available at: <https://www.theatlantic.com/international/archive/2017/05/trump-isis-losers/527925/>; Victor Jeleniewski Seidler, “‘They’re losers, just remember that’: how young men turn to extremism,” *Prospect*, dated May 26 2017. Accessed November 8 2019. Available at: <https://www.prospectmagazine.co.uk/other/theyre-losers-just-remember-that-how-young-mens-identities-can-lead-to-extremism>; Tom Rogan, “ISIS’ recruiting strategy: use technology to turn losers into terrorists,” *National Review*, dated June 13 2016. Accessed November 8 2019. Available at: <https://www.nationalreview.com/2016/06/orlando-shootings-isis-terrorism-recruitment-strategy-losers-attracted-technology/>

psychologically-functional majority. Such thinking can foster a dangerous lack of empathy, which can encourage responses that only stoke further conflict. Additionally, the focus on the ‘grooming’ recruiter or seductive propagandist reduces the entire, complex phenomenon to one of criminal exploitation by self-serving manipulators bent on recruiting the ‘vulnerable’ to enact their violent designs. This completes the erasure of potential legitimate grievances and renders the task of mitigating against the occurrence of IV an issue of law-enforcement; the task being to identify, interdict and neutralise the agents of radicalisation. This represents a continuation of one of the oldest and bluntest tendencies of the conservative paradigm: As Rosa Luxemburg wrote in 1904: “the comforting conclusion is always drawn that the [movement] is produced by individual demagogues and agitators; and that therefore there is in the prisons and bayonets an adequate means of subduing [it]³⁴⁸”. For many scholars, this is constitutive of a deliberate “doctrine of no responsibility” adopted by Western governments in response to the issue of Islamist terrorism³⁴⁹, one that became stubbornly entrenched as the Bush and Blair administrations began to face mounting accusations that their invasion of Iraq had created a disastrous “blowback” that had reinvigorated an AQ that, prior to 2003, was in sharp decline³⁵⁰. Overall, this political critique of RVE is perhaps best summed up by repentant RVE insider Marc Sedgwick: “the concept of radicalisation emphasises the individual and [...] the ideology [...] and significantly de-emphasises the wider circumstances. [...] [resultantly the] radical will often appear as a ‘rebel without a cause’”³⁵¹. When dissent has no cause, then the targets of that dissent have no accountability.

³⁴⁸ Rosa Luxemburg, *The Mass Strike, the Political Party and the Trade Unions*, trans. Patrick Lavin (Detroit: Marxist Educational Society, 1925 [1906]). Available at: <https://www.marxists.org/archive/luxemburg/download/mass-str.pdf>, 9.

³⁴⁹ This particular term being coined by Kettell (Kettell, *New Labour*, 82).

³⁵⁰ Perhaps best expressed in a highly defensive 2007 article for *Foreign Affairs* written by Tony Blair, in which he railed: “I am still amazed at how many people say, in effect, that there is terrorism today because of the invasions of Afghanistan and Iraq. They seem to forget entirely that 9/11 predated both. The West did not attack this movement. It was attacked [...] It is almost incredible to me that so much Western opinion appears to buy the idea that the emergence of this global terrorism is somehow our fault. [...] [such accusations are proof that] many in Western countries listen to the propaganda of the extremists and accept it” (Tony Blair, “A Battle for Global Values,” *Foreign Affairs*, dated January/February 2007. Accessed January 11 2020. Available at: <https://www.foreignaffairs.com/articles/2007-01-01/battle-global-values>).

³⁵¹ Sedgwick, “The Concept of Radicalization,” 481. For other iterations of this broader claim, see: Schmid, *Radicalisation, De-Radicalisation*, 3 and 5; Kundnani, “Radicalisation,” 6; Mythen, et al., “Assembling and deconstructing,” 190; Harris-Hogan and Barrelle, “Assisting practitioners,” 1.

1.3.4.2. *Distorting pro-secular bias:*

Western observers frequently exhibit a post-enlightenment disdain towards religious interference in public and political life and, albeit to a lesser degree, religiosity more broadly. Organised religion has, since the French Revolution, been viewed by many in the West as inherently retrograde and reactionary³⁵²: an archaic, stubborn, and superstitious obstruction to reason, progress, and the realisation of people's rights (a stereotype lent credence in the eyes of many by continuing opposition by many Christians and Muslims to contemporary *causes de jour* such as gay marriage and abortion rights). This has often resulted in politicised religion being viewed as inherently threatening: While you can reason with a secularist – even a brutal war criminal – you cannot with a religious 'fanatic'³⁵³. Such beliefs, "our comforting metaphysical dualisms [that] insist on the rationality of [secular] liberal democracy vis-à-vis against 'Islamic irrationalism'³⁵⁴", verge on the absurd when one considers that the secular West "just produced two world wars and the Holocaust within the span of a century³⁵⁵"; while, more recently, liberal democracy has produced quasi-tribal social polarisations; volatile populist movements; an impulsive politics of mutual outrage and demonisation, witch-hunts, and wildfire moral panics; a mass conspiracist movement; and the attempted overthrow of the US government stirred by the baseless harangues of a cornered demagogue. As noted, those a century before us realised, in the 'crisis of modernity', that there is no monopoly on irrationality, nor reliable antidote in secularism. Such a way of thinking, moreover, leaves no room for understanding religious ideologies as potentially rational-choice political programs aimed at enshrining the same or even superior rights and justice so prized by secularists. Rarely is it entertained that the notional Islamic state cherished by many of Syria's Islamists might be rationally envisioned, in their eyes, as a far more humane political system than the authoritarianism they are accustomed to, or indeed the impoverishing, unstable,

³⁵² Jürgen Habermas, "Religion in the Public Sphere," *European Journal of Philosophy* 14(1) (2006), 1.

³⁵³ Such was the logic of those who increasingly called for the West to back Assad against the Islamist-dominated SAOM – see footnote 344 above and chapter 3.

³⁵⁴ Mishra, *Age of Anger*, 348.

³⁵⁵ Matthew Duss, "U.S. Foreign Policy never recovered from the War on Terror," *Foreign Affairs*, dated October 22 2020. Accessed December 5 2020. Available at: <https://www.foreignaffairs.com/articles/afghanistan/2020-10-22/us-foreign-policy-never-recovered-war-terror>

cut-throat neoliberal capitalism and increasingly toxic populist democracy pressured upon them by the West.

At the level of individual observance, academically-shaky but culturally-pernicious *modernisation theories* denigrate religiosity as “a waning, irrational, and dysfunctional aberration³⁵⁶”, a “remnant from a prior epoch of superstition and miseducation³⁵⁷.” In psychological literature, religiosity is often tolerated condescendingly as a therapeutic refuge for those unable to cope with the rigours of ‘real’ life³⁵⁸. This secular bias contributes further to the construction of the irrational religious ‘extremist’ folk-devil, with all its potential to mislead and discolour further research built upon it. Specifically, this characterisation promotes three main thought trends: firstly, as noted, religiously-articulated IV is often dismissed as a form of irrational, individual-level psychological ‘lashing-out’, inflicted by the anomic upon innocent bystanders (furthering the folk-devil caricature of religious militants being driven solely by irrational and intolerant religious fanaticism – *à la obediently violent* and *post facto grievance* sub-paradigms). Secondly, this mindset encourages us to view the motivations of religious IV as being wholly other-worldly (or at least non-worldly); motivated by the apparently selfish desire to attain paradise for themselves in the afterlife – or psychological catharsis for themselves in this life - in contrast to the thoroughly worldly and altruistic desires of secular ideologies to build just societies for all. Discouraged are we from entertaining the notion that Islamist IV may in fact be rooted in this same altruistic and rational worldly desire. This is despite plentiful

³⁵⁶ Zbigniew Brzezinski, “The illusion of control,” in *Peacemaking: Moral and Policy challenges for a new world*, eds. Gerard F. Powers, Drew Christiansen, SJ, and Robert T. Hennemeyer (Washington, DC: United States Catholic Conference, Inc., 1994), 31.

³⁵⁷ N.J. Demerath III and Karen S. Straight, “Religion, Politics, and the State: Cross-Cultural Observations,” *CrossCurrents* 47(1) (Spring, 1997), 43.

³⁵⁸ For example, researchers have noted a high incidence of depression and/or childhood/teenage emotional stress among individuals who embraced a religious belief system (i.e., those not raised/socialised into a particular religion). See: Raymond F. Paloutzian, *et al.*, “Religious conversion and personality change,” *Journal of Personality* 67(6) (1999): pp. 1047-1079. Other scholars have conceptualised religion as a form of coping resource, servicing the same psychological needs – control, meaning, self-esteem, self-actualisation, etc. – cited in conservative paradigm vulnerability profiles. See: Chrystal L. Park, “Religion as a meaning-making framework in coping with life stress,” *Journal of Social Issues* 61(4) (2005): pp. 707-729; Robert A. Emmons, “Striving for the sacred: personal goals, life meaning, and religion,” *Journal of Social Issues* 61(4) (2005): pp. 431-745; Aaron C. Kay, *et al.*, “Religious belief as compensatory control,” *Personality and Social Psychology Review* 14(1) (2010): pp. 37-48; Kenneth I. Maton and Elizabeth A. Wells, “Religion as a community resource for well-being: prevention, healing, and empowerment pathways,” *Journal of Social Issues* 51(2) (2005): pp. 177-193; Michael A. Hogg, “Religion in the face of uncertainty: an uncertainty-identity theory account of religiousness,” *Personality and Social Psychology Review* 14(1) (2010): pp. 72-83.

historical and literary evidence that the founding rationale(s) for political Islam was to implement a state-society model proven by theology and history³⁵⁹ to provide a tried and tested roadmap for establishing universal justice³⁶⁰.

1.3.4.3. *Takes as granted the rationality, desirability, functionality, and justice of the establishment ideology:*

Finally, the very *raison d'être* of the conservative thesis is inherently establishment ideology-normative in that it stands on the assumption that individuals living in the modern, prosperous, and democratic West could not possibly have genuine grievances needing redress, and/or could not possibly prefer an ideology over the establishment ideology's unrivalled freedoms and luxuries. Therefore, dissent must be pathological and irrational. This belief requires a romanticisation of the West's neoliberal democratic system that simply does not withstand empirical scrutiny. It is notable that policymakers, pundits, and scholars are far quicker to acknowledge the deep discontents currently afflicting Western societies when seeking to explain non-religiously-expressed dissent³⁶¹. Yet as soon as discontent is expressed in a religious – and particularly Islamic – guise, the untainted virtues of Western freedoms are once again defended to the hilt against Islamism's supposed totalitarianism, irrationality, and oriental despotism.

1.4. Conclusion:

This chapter has 'dissected' the conservative paradigm, demonstrating that it is not fit for purpose methodologically, conceptually, empirically, or politically. Its foundational assumptions evolved in a methodologically-shaky manner, inextricably tied to the political and cultural preoccupations, presumptions, and prejudices of the periods in which they emerged, while the research agendas it encourages are fraught with issues at the level of data acquisition and interpretation. Conceptually it is shaped, constrained, and confused by a nomenclature with extra-academic origins and a lack of clear or consensual

³⁵⁹ If possibly rather hagiographically on the part of the latter.

³⁶⁰ See Chapter 7.

³⁶¹ Most notably, the anti-elite, nativist populisms behind the electoral success of President Trump in the US and the surprise Brexit referendum result in the UK have been readily attributed to such deep discontents (notably widening wealth disparities, job insecurity, competition and unfulfillment, brutal austerity regimes, unrepresentative and untrustworthy politicians, and the anomic, existentialist angst and mental illnesses promoted by them).

definitions and procedures for operationalisation. Empirically, it struggles to conceptualise emerging threats – requiring constant evolutions to account for changing IV imaginaries – while being at a loss when faced with IV occurring beyond the ‘deviant fringe’. Finally, it is inextricably tied to a pro-establishment political agenda that imposes a research agenda that – by assuming the ‘vulnerability’ or ‘deviance’ of the IV perpetrator – can only yield conclusions that protect the establishment from criticism, and de-legitimise dissent against it.

As I demonstrate in chapter 3, the cracks in the conservative paradigm began to show during the GWOT and subsequent Iraqi-Syrian conflagration, prompting attempts at synthesis that would clumsily attempt to combine the benefits of both conservative and progressive paradigms. First, however, the progressive paradigm must be considered.

Chapter 2: The progressive paradigm of ideological violence:

2.

This chapter subjects the progressive paradigm to the same process of GA-led explication and problematisation as the conservative paradigm in the previous chapter. In contrast to the conservative paradigm – who's iterations vary temporally and abrogate one another - the progressive paradigm's iterations vary spatially according to different political agendas/ideological stances. Rather than abrogating or negating one another, these iterations exist in relative harmony, with its various sub-paradigms often being shared between iterations. Thus, I structure the chapter slightly differently, with a briefer GA and a separate, more regimented descriptive literature review, followed by my problematisation section.

Specifically, the chapter proceeds as follows. *Section 2.1. explicates the paradigm's three foundational assumptions on the causation of IV. Section 2.2. presents a genealogical analysis tracing the developmental trajectories of its three main iterations (the 'insurgent', 'counterinsurgent', and 'observer' iterations). Section 2.3. explicates the paradigm's various, often overlapping sub-paradigms. Finally, Section 2.4. problematises the paradigm on methodological, conceptual, empirical, and political grounds.*

2.1. The progressive paradigm defined:

The progressive paradigm can be summarised as follows:

2.1.1. Foundational assumption 1: On the causation of IV:

The progressive paradigm assumes that IV occurs when extant macroscopic grievances drive a community to view as illegitimate the establishment and its ideology. Such legitimacy crises prompt such communities to seek out alternative authorities and systems (i.e., ideologies/movements) that might better cater for their material interests. An alternative, complementary variation proposes that legitimacy crises – when accompanied by oppression, exploitation, or neglect – can push communities towards *any* movement plausibly offering to protect and empower them, regardless of its particular ideology, even those considered abhorrent to the 'rational' mind.

The causal relationship between engagement in IV and the embracing of such ideologies/movements can take two forms: on one hand, communities already intent on violent revolt may embrace an ideology that rationalises, justifies, and directs that revolt on a *post facto* basis (or rally behind a movement willing and able to assist/lead them). On the other hand, an aggrieved community may embrace a particular ideology/movement that happens to prescribe violence to affect change.

Despite these nuances, I heuristically refer to these dynamics collectively as *post facto rationalisation* to aid in continuous contrast and comparison with the conservative paradigm's opposing dynamic of *ideological persuasion*: the distinction being that, under *post facto rationalisation*, grievances precede and facilitate ideological-popularisation while, under *ideological persuasion*, grievances are conjured *ex nihilo* by the ideology.

2.1.2. Foundational assumption 2: On ideological popularisation:

The precise mechanisms of ideological-popularisation often vary depending on the particular researcher's opinion of the particular ideology/movement under study. If the researcher is sympathetic to the ideology/movement then a 'mobilisation' logic typically prevails, with ideological-popularisation reflecting that ideology's accurate reflection of – and compelling alternative to – the establishment ideology's bankruptcy. Should the researcher be *unsympathetic* to the ideology/movement but *sympathetic* to the aggrieved population, then an 'exploitation' logic predominates, in which an opportunistic movement – abhorrent to the rational mind under non-crisis conditions – exploits the legitimacy crisis to portray itself as the aggrieved population's only hope for deliverance and/or protection.

Because ideologies/movements play a *post facto* role rather than an initiatory role in motivating IV, the progressive paradigm opens the possibility of multiple ideologies/movements competing to win over the aggrieved population. Success in such competitions is typically understood to depend less on the appeal of that movement's particular ideology, and more on its perceived, relative ability to protect the aggrieved community from the oppressive authorities, depose those authorities, and cater to their material needs, etc.

Of crucial distinction here is that, contrasting with the conservative paradigm view that only 'vulnerable' individuals are susceptible to IV, the

progressive paradigm holds as susceptible entire communities. However, while under the conservative paradigm the 'vulnerable' are *always* susceptible, under the progressive paradigm they are *only* susceptible under macroscopic crisis conditions.

2.1.3. Foundational assumption 3: On preventing/containing IV:

Preventing/containing against IV thus requires addressing the extant grievances that caused the legitimacy crisis and rendered the population susceptible to IV in the first place. If the prompting legitimacy crisis is resolved, ideologies/movements will lose persuasive power. Conservative paradigm efforts to delegitimise/refute that ideology/movement will only produce a vacuum for rival ideologies/movements to exploit, while grievances persist. Otherwise stated, while the conservative paradigm holds that preventing ideological-popularisation will prevent grievances, the progressive paradigms holds that preventing grievances will prevent ideological-popularisation.

The paradigm is 'progressive' in that it acknowledges stated grievances, legitimising those grievances if not necessarily the IV and/or ideology/movement. Because IV is thus considered a rational (if potentially misguided) act – driven by a desire to alleviate those grievances – the establishment/*status quo* is assumed to be problematic, requiring alteration.

Research bounded by this paradigm is constrained to asking questions such as: 1) what grievances are likely to prompt legitimacy crises? 2) how do rival ideologies/movements compete for the sentiments of aggrieved populations? 3) how can legitimacy be restored in crisis-stricken regimes?, etc. The variables sought for investigation are constrained to the macro-realm, focussing on how legitimacy is built or lost, how ideologies/movements wrestle for legitimacy, etc.

2.2. Genealogy of the progressive paradigm:

Like the conservative paradigm, the progressive paradigm traces its origins to the 1789 *French Revolution*, initially developing as an explicit counter-paradigm to the conservative paradigm - attempting to legitimise IV to counter the conservative paradigm's de-legitimising efforts³⁶². Moreover, it developed as an

³⁶² For example, Marx and Engels denounced the "superstition which attributed revolutions to the ill-will of a few agitators" and asserted the 'self-evident' reality that "wherever there is a

ideology-normative pragmatic programme to unlock the ‘science’ of ideological-popularisation, in direct confrontation with the conservative paradigm’s establishment-normative efforts to inhibit such ideological-popularisation³⁶³. However, the paradigm has since diversified, internally tweaking its foundational assumptions in accordance with varying agendas. No longer confined to an anti-conservative counter-paradigm, there today exists three broad iterations: 1) the founding ideology-normative ‘insurgent’ iteration; 2) an establishment-normative, non-domestic ‘counterinsurgent’ iteration; and 3) a relatively disinterested, ‘observer’³⁶⁴ scholarly/journalistic iteration.

2.2.1. The insurgent iteration:

The insurgent iteration was developed by the new breed of ‘professional revolutionary’³⁶⁵ that emerged in response to post-French Revolutionary Reactionism. These activists sought to discover how the masses – subdued by apathy, oppression, and establishment ideological manipulation – could once more be roused to revolutionary activism as they had been in 1789/1792, etc.

Contrasting with the conservative paradigm – which took as granted the superiority, justness, rationality, and desirability of the establishment ideology – the progressive paradigm’s architects took as granted those same qualities in the

revolutionary convulsion, there must be some social want in the background...” (Marx and Engels, *Revolution and Counter-revolution*, 14), while Rosa Luxemburg expressed her vexation that “the comforting conclusion is always drawn [by establishment defenders] that the [unrest] is produced by individual demagogues and agitators; and that therefore there is in the prisons and bayonets an adequate means of subduing [it].” See: Luxemburg, *The Mass Strike*, 9.

³⁶³ See below.

³⁶⁴ As we established in the previous chapter, the social and ideological nature of IV research means that even those without an overt or even conscious ideological/political agenda never operate complete free of ideological assumptions and preconceptions. Nevertheless, this iteration can be differentiated from the insurgent and counterinsurgent iterations for its lack of deliberate, conscious partisan agenda.

³⁶⁵ Hobsbawm defines this age of the ‘professional revolutionary’ by contrasting it with the non-professionalism of previous revolutionaries, saying that “unlike the revolutions of the late eighteenth century, those of the post-Napoleonic period were intended or even planned” (Hobsbawm, *The Age of Revolution*, 112). Similarly, Rapport writes: “Those [revolutionaries] of the French Revolution of 1789 had been unexpectedly hurled – often from obscure, drab provincial lives – into the maelstrom that eventually convulsed Europe for more than two decades: they became revolutionaries by accident and often quite reluctantly. Those of this new generation were self-consciously and actively trying to provoke a revolution” (Rapport, *1848*, 18). In discussing the characteristics and motives of the new ‘professional revolutionaries’, Hutton describes “a secular monk – totally committed to revolutionary action...” whose importance lay in ensuring “...that the revolutionary cause would survive even after popular enthusiasm had waned” (Patrick H. Hutton, *The Cult of the Revolutionary Tradition: The Blanquists in French Politics, 1864-1893* (Berkeley and Los Angeles: University of California Press, 1981), 135). They perceived of themselves “as small elites of the emancipated and progressive operating among, and for the eventual benefit of, a vast and inert mass of the ignorant and misled common people” (Hobsbawm, *The Age of Revolution*, 115).

ideology they sought to promote. To them, the truth of their ideology's claims – and its ability to realise the best interests of the masses – was self-evident; ideological-popularisation being inhibited only by the corrupting influence of reactionary forces and entrenched traditions and superstitions. This resulted from a conceptualisation of the 'ideological arena' equally as simplistic as that of the conservative paradigm: while the conservative paradigm conceptualised the ideological arena as pitting rational, non-ideological thinkers (i.e., establishment ideology adherents) against irrational ideological-thinkers (ideology supporters), the progressive paradigm perceived a binary between gilded tyranny (the establishment) and liberation (their ideology)³⁶⁶. The masses thus faced a choice that was both simple and singular: absent was any recognition that the people might entertain competing visions of liberation (e.g., the *fraternité* of nationalism vs. the *égalité* of socialism)³⁶⁷, less still that they might prefer the establishment

³⁶⁶ For example, Bianco wrote with confidence that, hastened to action by revolutionary insurrection "every Italian who loves his country and is brave of heart will pursue the barbarian [Austrian] oppressors with ardour" (Carlo Bianco, "A handbook for Revolutionary bands," in *The Guerrilla Reader: A Historical Anthology*, ed. Walter Laqueur (New York: New American Library, 1977), 68), and "The entire Italian population will rise up against the [Austrian] oppressors" (quoted in: Andrea Beccaro, "Carlo Bianco and Guerra per bande: an Italian approach to irregular warfare," *Small Wars & Insurgencies* 27(1) (2016), 169). He made this binary (and the simplicity of the choice this presented the masses) most explicit when he warned: "People are compelled to support those who fight for the people"; therefore, whoever does not offer support will be treated as an enemy (Ibid, 166). Similar sentiments are evident in the writings of Mazzini and the Polish nationalist Wojciech Chrzanowski, who asserted respectively that: "There will be a decisive struggle between tyranny, driven to its final and most desperate resistance, and those bravely resolved to dare its overthrow" (Giuseppe Mazzini, trans. Stefano Recchia, "Manifesto of Young Italy (1831)," in *A Cosmopolitanism of Nations: Giuseppe Mazzini's writings on democracy, nation building, and international relations*, eds. Stefano Recchia and Nadia Urbinati (Princeton and Oxford: Princeton University Press, 2009), 34); and "Such [partisan] war can have a place anywhere within one's own country – whenever the inhabitants have the courage to defend themselves, and don't want to submit to abuse, plundering, and ultimately, to accept enslavement" (Wojciech Chrzanowski, *On Partisan War*, trans. Arthur T. Orawski (Oak Brook, IL: TIPRAC, 1995 [1835]), 4).

³⁶⁷ A number of scholars note that, prior to the 1830 *European Revolutions*, there was little conscious ideological distinction between the various strains and interests of the broader revolutionary movement – something which only became apparent during those revolutions as the revolutionary movement fragmented into distinct interest groups with irreconcilable agendas (Billington, *Fire in the Minds*, 4 & 146; Hobsbawm, *The Age of Revolution*, 111-132). While 1830 provoked an intellectual distinction between liberalism, socialism and nationalism (and, more broadly, between political and social revolution), the majority of the masses were still largely illiterate to these distinctions during the upheavals of 1848, accepting the leadership of bourgeois liberal revolutionaries who did not share their aspirations for social revolution. Only after being betrayed by such leadership did these distinctions become clear in the minds of the masses; see: Samuel Hayat, "Working-Class Socialism in 1848 in France," in *The 1848 Revolutions and European Political Thought*, eds. Douglas Moggach and Gareth Stedman Jones (Cambridge: Cambridge University Press, 2018), 120; Robert Gildea, "1848 in European Collective Memory," in *The Revolutions in Europe, 1848–1849: From Reform to Reaction*, eds. Robert Evans and Hartmut Pogge von Strandmann (Oxford: Oxford University Press, 2002), 215; R. J. W. Evans, "Liberalism, Nationalism, and the Coming of the Revolution," in *The Revolutions in Europe, 1848–1849: From Reform to Reaction*, eds. Robert Evans and Hartmut Pogge von Strandmann (Oxford: Oxford University Press, 2002), 10; Douglas Moggach and Gareth Stedman Jones, "Introduction,"

ideology – with its comforting familiarity, traditions, values, and stability – over the unfamiliar, abstract, destabilising and, at times, taboo alternatives offered by revolutionary intellectuals³⁶⁸. This naivety was augmented by the popularisation of *determinist* and/or *primordialist* philosophies of history/society: Determinists – predominantly socialists - predicted that the masses would naturally, inevitably, and ubiquitously develop socialist views in response to their lived experiences under capitalism³⁶⁹. Primordialists - generally romantic nationalists - held that national consciousness/patriotic sentiment existed naturally within individuals,

in *The 1848 Revolutions and European Political Thought*, eds. Douglas Moggach and Gareth Stedman Jones (Cambridge: Cambridge University Press, 2018), 12.

³⁶⁸ Again, the folly of this naiveté was made clear during the 1848 revolutions, primarily among the peasant classes who demonstrated an unforeseen deference to traditional elites in French elections (Lindemann, *A History of Europe*, 82) and to the Monarchy and Church in the Habsburg lands (Hobsbawm, *The Age of Revolution*, 159-160). For a contemporary source, consider Marx and Engels, *Revolution and Counter-revolution*, 17.

³⁶⁹ The most famous and complete articulation of this type of theory was that of *dialectical materialism*, proposed by Marx and Engels in their *Communist Manifesto* (Karl Marx and Frederick Engels, *Manifesto of the Communist Party*, trans. Samuel Moore and Frederick Engels, (Marxists Internet Archive, 1987 [1848]). <https://www.marxists.org/archive/marx/works/download/pdf/Manifesto.pdf>). They themselves were building on precedents set by leftist followers of French philosopher *Henri Saint-Simon* (notably Olinde Rodrigues and Barthelemy Prosper Enfantin who drew from his works a determinist theory of class conflict resulting from “the relationship of the workers with the owners of the instruments of labor” - Quoted in Billington, *Fire in the Minds*, 217), and of German philosopher *Georg Wilhelm Friedrich Hegel* (These *Young Hegelians* interpreted Hegel’s *dialectical* philosophy of history to view socialist revolution as an inevitable occurrence in the course of history, representing the natural antithesis to the currently dominant thesis of capitalism - Ibid, 228). Some Nationalists also embraced determinist thinking, viewing national consciousness as resulting inevitably from individual and social progress - notably, French nationalist historian Jules Michelet saw an individual’s personal development as leading inevitably to entry into “the spirit of his country” (Jules Michelet, *The People*, trans. C. Cocks, 3rd ed. (London: Longman, Brown, Green, and Longmans, 1846), 140). At the level of society, Mazzini asserted that “The tortures of slavery have been for the peoples an initiation in the worship of liberty” - liberty which he equated directly with national consciousness (Giuseppe Mazzini, “Faith and the Future,” in *Essays: Selected from the writings, literary, political and religious, of Joseph Mazzini*, ed. William Clarke (London: Walter Scott, Ltd., 1887), 11).

either as a result of historical³⁷⁰ and/or cultural-linguistic³⁷¹ commonalities (which bestowed nationalities with unique and inherent unifying characteristics and modes of thought, perception, and temperament) or else as a result of divine providence (whereby God had ordained the nation as the primary unit by which His plan on earth would be realised)³⁷². It followed from these philosophies that

³⁷⁰ This school of thought emerged from the new vogue in German Philosophy of anti-rationalist *romanticism*, which looked to history to find continuities in unique national characteristics. For example, Polish nationalists saw in their national history an inherent and distinctly Polish quality of egalitarianism, evidenced, according to the romantic nationalist Joachim Lelewel, by its history of republican government and elected leaders, and novel eschewal of the black slave trade (Joachim Lelewel, trans. Zuzanna Ładyga, "Legitimacy of the Polish Nation," in *Discourses of Collective Identity in Central and Southeast Europe 1770-1945, Vol. II: National Romanticism: the formation of National Movements*, eds. Balázs Trencsényi and Michal Kopecek (Budapest: Central European University Press, 2013 [2007]), pp. 33-41. Available at <https://books.openedition.org/ceup/2252>). Italians like Mazzini claimed that republican mantle for their own nation, for "our Italian tradition is essentially republican; our great memories are republican; the whole history of our national progress is republican" (Giuseppe Mazzini, *Giuseppe Mazzini: Selected Writings*, ed. N. Gangulee (London: Lindsay Drummond Ltd., 1945), 128). The French Jules Michelet, meanwhile saw in his own nationality a historical trend of chivalry, nobility, martial courage and – above all – love for one's country, cultivated by the country's tradition of "peasant-soldier-proprietors" who, in contrast to the serfs or wage labourers of other countries, held a natural love for the soil they owned and toiled, and had fought for generations to protect (Michelet, *The People*). Russian *Slavophiles*, like Mikhail Bakunin, saw in the Russian peasant tradition of the collective farm (*obshchina*) and workshop (*artel*) an intrinsic democratic nature (Avraham Yarmolinsky, *Road to Revolution: A Century of Russian Radicalism* (1956). Available at: <http://www.ditext.com/yarmolinsky/yar0.html>).

³⁷¹ Many German *romanticists* also posited that individuals who "speak the same language think and feel alike" as a result of the linguistic expressions at their disposal, and thus feel a natural affinity with their co-linguists and an inevitable distance from those who differ linguistically (Johann Gottlieb Fichte quoted and paraphrased in Serhiy Bilenyk, *Romantic Nationalism in Eastern Europe: Russian, Polish, and Ukrainian Political Imaginations* (California: Stanford University Press, 2016), 2). The nationalist application of this philosophy is exemplified by Polish historian and revolutionary Lelewel, who asserted "language is a precious national possession ... for it expresses [a nationality's] thoughts and ideas" and then used such linguistic analysis to assert that the Polish people are intrinsically egalitarian as "I cannot find anywhere—either in Polish or in any other Slav dialect—a word that denotes despotism" (Lelewel, "Legitimacy of the Polish Nation").

³⁷² Such *national messianism* was a further extension of romanticism, and held that 1) nations were God's chosen medium for instituting social justice across the world and 2) God had granted the different nations unique, peculiar characteristics to equip them for the specific national missions (towards the greater good of humanity) He had ordained for them. Such ideas abound across the works of Italian nationalists like Mazzini (compiled in such volumes as Mazzini, "Faith and the Future,"; and Mazzini, *Giuseppe Mazzini: Selected Writings*; etc.) and Bianco (Bianco, *Handbook*); Polish nationalists like Mickiewicz (Adam Mickiewicz, trans. Dorothea Prall Radin and Louise Varèse, "Prophecies," in *Discourses of Collective Identity in Central and Southeast Europe 1770-1945, Vol. II: National Romanticism: the formation of National Movements*, eds. Balázs Trencsényi and Michal Kopecek (Budapest: Central European University Press, 2013 [2007]), pp. 408-420. Available at <https://books.openedition.org/ceup/2369?lang=en>) and Brodziński (from a speech of 1832 quoted in Porter, *When Nationalism began to Hate*, 27); and the French Michelet (Michelet, *The People*). While typically advocating for a harmonious *Brotherhood of Nations* (in explicit contrast to the chauvinistic nationalisms that were to follow), many nationalists came to see in their own nations a God-given 'Messiah' role, whereby God had imparted upon them particular qualities and virtues through which they would liberate the rest of the world from tyranny (good overviews with examples can be found in Hobsbawm, *Age of Revolution*, 133; and Maciej Ruczej, "'Daringly, yet with Reverence': Pearse, Mickiewicz and the Theology of National Messianism," *Études Irlandaises* 39(1) (2014), 59-60).

the absence of class/national consciousness among the masses was a 'corruption' in need of restoring rather than a blank canvas in need of persuading. Ideological movements had only to 'awaken'³⁷³ these intrinsic sentiments, repressed by establishment manipulation, to see the people embrace their ideology unanimously. Thus, in contradistinction to the conservative paradigm's quest to understand why 'rational', 'non-ideological' individuals 'turn irrational and ideological', the insurgent iteration of the progressive paradigm sought to understand why the 'natural' and 'rational' revolutionary fervour and ideological consciousness of the masses corrupted into 'irrational' deference towards the establishment that clearly did not serve their interests and identify how rationality might be restored.

Early theories were simplistic, typically believing that movement cadres need only produce a 'spark'³⁷⁴ to rouse the masses from their lethargy and cast the scales from their eyes. This encouraged naïve approach to propaganda whereby, owing to the simple choice the people faced, there was less need to 'sell' their choice ideology as to simply publicise its existence. Once the state's monopoly over public discourse was broken, the establishment ideology would

³⁷³ Such language of 'awakening' or 're-awakening' national or class consciousness is ubiquitous across literature from this period, notably among many of the most influential thinkers of the time, such as France's Louis-Auguste Blanqui (Louis-Auguste Blanqui, "Report to the Society of the Friends of the People (2 February 1832)," *The Blanqui Archive*, Kingston University. <https://blanqui.kingston.ac.uk/texts/report-to-the-society-of-the-friends-of-the-people-2-february-1832/>; and Louise-Auguste Blanqui, trans. Mitch Abidor, "Democratic Propaganda (1833)," *Marxists Internet Archive*. <https://www.marxists.org/reference/archive/blanqui/1833/democratic-propaganda.html>); Italy's Giacomo Leopardi (quoted in: Silvana Patriarca, "A Patriotic Emotion: Shame and the Risorgimento," in *The Risorgimento Revisited: Nationalism and Culture in Nineteenth-Century Italy*, eds. Silvana Patriarca and Lucy Riall (Basingstoke: Palgrave Macmillan, 2012), 143); and the Poles, Henryk Kamieński (Henryk Kamieński, trans. Zuzanna Ładyga, "Vital truths of the Polish Nation," in *Discourses of Collective Identity in Central and Southeast Europe 1770-1945, Vol. II: National Romanticism: the formation of National Movements*, eds. Balázs Trencsényi and Michal Kopecek (Budapest: Central European University Press, 2013 [2007]), pp. 421-427. Available at <https://books.openedition.org/ceup/2229>) and Karol Stolzman (Karol Stolzman, "Terrifying for the strongest enemy," in *The Guerrilla Reader: A Historical Anthology*, ed. Walter Laqueur (New York: New American Library, 1977), 86).

³⁷⁴ According to Billington, this metaphor had been coined in 1654 by English polemicist James Howell in his *Parthenopoeia, or the History of the Most Noble and Renowned Kingdom of Naples*. Moreover, Howell had himself been synthesising a large body of works from "the already well-developed Italian discussion of political revolution." See: Billington, *Fire in the Minds of Men*, 18. Variations on this metaphor abound across the writings of revolutionary thinkers during this period; notably Mazzini ("If we act resolutely, if we show one spark of real fire, Italy is a volcano"; quoted in *Ibid*, 147); Kamieński ("the electric spark over the whole of Poland, set in motion by a magical power"; quoted in *Ibid*, 171); and, with slight variation, Blanqui ("They [the masses] are a spring that compression has made more energetic and that only asks to be released"; in Blanqui, "Democratic Propaganda").

simply collapse under the un-deniable truth of their ideological narrative³⁷⁵. This frequently took the form of insurrectionary action which, even when unsuccessful, was considered a potent strategy for breaking the population's lethargy and hopelessness³⁷⁶. Such activities, it was believed, could raise ideological consciousness by 1) providing leadership and direction to turn non-politicised popular exasperation into active political force³⁷⁷; 2) revealing to the people their own strength (thus dispelling their sense of resignation and futility)³⁷⁸; and 3) raising ideological consciousness by building solidarity and camaraderie³⁷⁹, cultivating heroes and martyrs³⁸⁰, and provoking regime repression that would push the population into the liberating arms of the revolutionaries³⁸¹. These

³⁷⁵ For example, Blanqui asserted confidently that "the aristocracy is powerless to fight against republicans on the field of ideas. If the press is still an arm in its hands it's because it uses it to spread slander while we, with the sole force of our doctrines of equality and fraternity, are sure to carry the masses along" (Blanqui, "Democratic Propaganda,"). Mazzini echoed such sentiments when he said "A few among you, once imbued with the true principles on which the moral, social, and political education of a People depend, will suffice to spread them among the millions, as a guide on their way, to protect them from the sophisms and false doctrines by which it will be sought to lead them astray" (from "The Duties of Man, 1844," in the compilation Mazzini, *Selected Writings*, 174).

³⁷⁶ For example, Mazzini is famous for his adage: "ideas ripen quickly when nourished by the blood of martyrs," (Quoted in Rapport, 1848, 18); with every failed insurrection providing the opportunity to spread their message and raise national consciousness. As Riall explains of Mazzini's logic: "A failed insurrection was not futile; it could – and indeed did – reveal Austrian repression to the Italians and, equally importantly, to the rest of the world. It was still a chance to appeal to the public imagination, to assert physically the existence of a political Italy; it was an occasion for speeches, proclamations and demonstrations and an opportunity to create heroes and martyrs" (Lucy Riall, *Garibaldi: Invention of a Hero* (New Haven and London: Yale University Press, 2007), 31).

³⁷⁷ See for example Blanqui, "Society of the Friends of the People,"; Giuseppe Mazzini, "Principles of Cosmopolitanism (1834)," in *Life and Writings of Joseph Mazzini, Vol. III – Autobiographical and Political* (London: Smith, Elder, & Co., 1891), 15; and Stolzman, "Terrifying for the Strongest Enemy," 86.

³⁷⁸ See Mazzini (Mazzini, *Selected writings*, 199 and 133-134; Mazzini, "Faith and the Future," 14; and Mazzini, "Manifesto of Young Italy," 36); Bianco, *Handbook*, 73; and Stolzman, "Terrifying for the strongest enemy," 87-88.

³⁷⁹ Speaking of guerrilla warfare, Stolzman asserted that "This kind of war gives rise to countless reasons for solidarity [...] arouses the nation from its lethargy, and both cultivates and channels a feeling of independence so prejudicial to action in orthodox warfare" (Stolzman, "Terrifying for the Strongest Enemy," 86).

³⁸⁰ This was a particular forte of Mazzini, who saw the importance of cultivating inspirational heroes not just in terms of individual revolutionaries (guerrilla leader Giuseppe Garibaldi becoming a particularly celebrated poster boy in the propaganda of Mazzini and his followers – see: Riall, *Garibaldi*) but also in the "collective heroism of the people in the act of insurrection" (Adrian Lyttelton, "The Hero and the People," in *The Risorgimento Revisited: Nationalism and Culture in Nineteenth-Century Italy*, eds. Silvana Patriarca and Lucy Riall (Basingstoke: Palgrave Macmillan, 2012), 44).

³⁸¹ Notably Bianco, *Handbook*. His logic is discussed in detail in Beccaro, "Carlo Bianco". This theme would continue well into the 20th century, with such strategies of provocation being advocated by the like of Ernesto 'Che' Guevara (Ernesto Che Guevara, *Guerrilla Warfare: A Method* (Peking: Foreign Languages: 1964 [1960/1963])) and Carlos Marighella (quoted in Paul B. Rich and Isabelle Duyvesteyn, "The study of Insurgency and Counterinsurgency," in *The Routledge Handbook of Insurgency and Counterinsurgency*, eds. Paul B. Rich and Isabelle Duyvesteyn (Oxon: Routledge, 2012), 7). More broadly, modern scholarship typically recognises

professional revolutionaries – particularly romantically-inclined nationalists - inverted the coterminous conservative paradigm notion of ‘vulnerability as moral degeneration’, attributing a *lack* of ideological consciousness and revolutionary fervour to it. Accordingly, this necessitated repairing the population’s frayed moral and spiritual fibre to break their lethargy and deference to corrupting norms and authorities and rouse them for action³⁸².

Experience (largely) dispelled this naïve optimism³⁸³, repeated setbacks educating ‘professional revolutionaries’ on the complexities of ideological competition. The 1848 *European Revolutions* were particularly instructive. Firstly, they demonstrated the potency of reactionary ‘smoke-and-mirrors’ strategies, which turned revolutionaries against each other through divide-and-rule³⁸⁴ or

such deliberate provocation as a key strategy of ideological movements – particularly when terrorism is involved – with the intention being to provoke the authorities into a disproportionate and indiscriminate retaliatory response which “punishes the broad population of which the terrorists are part” (David A. Lake, “Rational Extremism: Understanding Terrorism in the twenty-first century,” *Dialogue IO* 1(1) (Spring, 2002), 19) and thus “radicalises the moderates and drives them into the arms of the terrorists” (Joshua A. Geltzer, *US Counter-terrorism Strategy and Al-Qaeda: Signalling and the Terrorist world-view* (Oxon and New York: Routledge, 2010), 75).

³⁸² This moral regeneration was perceived in terms of both spiritual and social regeneration. Spiritual regeneration involved restoring the nation – defined by God – to the divine purpose prescribed to it by God. Mazzini urged that the people must be “liberated” from the corruptions of “materialism” and “analysis” [rationalism] that “weighs down their consciences” (Mazzini, “Faith and the Future,” 52; similarly Bianco blamed the materialistic luxuries of urban life as corrupting - Billington, *Fire in the Minds of Men*, 169). The people are to be ‘re-baptised’; with restored faith in God serving in turn to restore to the people “poetry” that “puts an end to the discords existing in society”, “make known to us the fatherland,” and “teach the young the nobleness of sacrifice [...] to have faith in things to come [...] to labour unceasingly to hasten their coming” (Ibid, 52-54). Social regeneration required abolishing privileges and inequalities that allowed men to exploit and enslave their countrymen – thus destroying all national feeling (Kamieński, “Vital Truths,”; Lelewel, “Legitimacy,”; and Michelet, *The People*, 22-25); spreading moral values (e.g. the *Russian Union of Welfare* - Yarmolinsky, *Road to Revolution*); and even through the purging process of engaging in violence against the oppressor (chiefly Bianco - Lucy Riall, “Men at War: Masculinity and Military Ideals in the Risorgimento,” in *The Risorgimento Revisited: Nationalism and Culture in Nineteenth-Century Italy*, eds. Silvana Patriarca and Lucy Riall (Basingstoke: Palgrave Macmillan, 2012), 155). For example, Leopardi and Bianco encouraged shaming the people into moral regeneration (Patriarca, “A Patriotic Emotion,” 143); Mazzini perceived that the people could be convinced of their current state of degeneracy by the efforts of a few dedicated men (Mazzini, *Selected Writings*, 174); while Lelewel advocated that generation could begin once Poland restored its tradition republican forms of governance (Lelewel, “Legitimacy”).

³⁸³ Notable exceptions include prolific 20th revolutionary tracts such as Ernesto ‘Che’ Guevara’s *Foco Theory* and Carlos Marighella’s urban guerrilla strategy, both of whom stated explicitly in their writings that a revolution could be fomented by the heroic, exemplary actions of a revolutionary vanguard, rather than waiting for macroscopic revolutionary conditions to ripen (Guevara, *Guerrilla Warfare*, 2; Marighella quoted in Rich and Duyvesteyn, “The study of Insurgency,” 7). As noted in footnote 337, Marighella, *al-Qaeda* and the self-styled *Islamic State* and, arguably, most modern terrorist groups, have all sought to create revolutionary conditions through a combination of ‘propaganda of the deed’ (developed by post 1848 Russian terrorist group *Narodnaya Volya*) and the broader pre-1848 trend of seeking to provoke the authorities into alienating retaliatory attacks that ‘radicalise’ the moderates.

³⁸⁴ Marx was particularly desolated in their reflections on the revolutions, deploring the way the new bourgeois authorities in France systematically turned on the masses who had carried them to power, and then proceeded to divide those masses against each other, fear-mongering and

subverted revolutionary movements through co-optation or selective appeasement³⁸⁵. Secondly, they revealed a more complex ideological arena, in which ideologies/movements had to compete not only with the establishment ideology but also with rival opposition movements. Contemporary socialist analyses lamented how easily the masses had been duped by bourgeois revolutionaries exhorting them towards revolutionary or national unity or, in the case of Napoleon III, dazzling them with emotive mythologising about restoring a Bonapartist heyday³⁸⁶. More generally, they decried the ideological illiteracy of the masses who, far from seeing the self-evident truths of socialism, were acutely vulnerable to the sophistry of both establishment defenders and bourgeois

villainising the proletariat so that their natural allies – the petit bourgeoisie and the peasantry – would come to perceive them as a greater enemy than the creditors, landlords and merchants who really exploited them (Marx, *The Class Struggles*, 22-24). Similarly did Bakunin write of the fate of the revolution in the Habsburg Empire, where he lamented the way the Habsburg Monarchy had played the multi-ethnic revolutionary masses off against each other on nationalist grounds, so that by the end of the revolution many Slavic revolutionaries were helping the old regime crush the Hungarian revolutionaries, etc. (discussed in E.H. Carr, *Michael Bakunin* (London and Basingstoke: the Macmillan Press Ltd., 1975 [1937]), 158). For general discussions of this process, see Hobsbawm, *The Age of Capital*, 29-32; and Rapport, 1848.

³⁸⁵ The Russian revolutionary intellectuals Herzen and Chemyshevski noted, for example, how the new bourgeois French authorities had used strategic concessions and lip-service to defang the revolutionary ardour of the Parisian workers (Discussed in Frederick C. Barghoorn, "Russian Radicals and the West European Revolutions of 1848," *The Review of Politics* 11(3) (Jul., 1949), 353). Similarly, the Habsburg Monarchy was able to secure the support of the peasant masses by abolishing Serfdom before the Nationalist revolutionary Magyar (Hungarian) nobility could do so themselves, thus successfully separating those revolutionaries from a key mass base – see: Hobsbawm, *The Age of Capital*, 29.

³⁸⁶ See, for example: Alexander Herzen, *My Past and Thoughts: The memoirs of Alexander Herzen, the authorised translation, Vol. III*, trans. Constance Garnett (London: Chatto & Windus, 1924 [1870]), 22; Marx, *The Class Struggles*, 21, 36; Karl Marx, *The Eighteenth Brumaire of Louis Bonaparte* (Marx/Engels Internet Archive, 1999 [1852]). Available at: <https://www.marxists.org/archive/marx/works/download/pdf/18th-Brumaire.pdf>, 38; Louis-Auguste Blanqui, "The Union of True Democrats (November 1848)," *The Blanqui Archives, University of Kingston*, accessed May 27 2018. Available at: <https://blanqui.kingston.ac.uk/texts/the-union-of-true-democrats-november-1848/>; Louis-Auguste Blanqui, "To the Mountain of 1793! To the Pure Socialists, its True Heirs! (3 December 1848)," *The Blanqui Archives, University of Kingston*, accessed May 27 2018. Available at: <https://blanqui.kingston.ac.uk/texts/to-the-mountain-of-1793-to-the-pure-socialists-its-true-heirs-3-december-1848/>; Louis-Auguste Blanqui, "Warning to the People (25 February 1851)," *The Blanqui Archives, University of Kingston*, accessed May 27 2018. Available at: <https://blanqui.kingston.ac.uk/texts/warning-to-the-people-25-february-1851/>; Frederick Engels, "Letters from France: II: Striking Proofs of the Glorious Progress of Red Republicanism!" *The Democratic Review* (Jan., 1850). <https://marxists.catbull.com/archive/marx/works/1849/12/20.htm>; Karl Marx and Friedrich Engels, "The Democratic Party," *Neue Rheinische Zeitung*, June 1848. Available at: <https://www.marxists.org/archive/marx/works/1848/06/02.htm>; Marx and Engels, *Revolution and Counter-revolution*, 3, 11, 24; Karl Marx and Frederick Engels, "Address of the Central Committee to the Communist League [1850]," *Marxist Internet Archive* Accessed May 5 2019. Available at: <https://www.marxists.org/archive/marx/works/1847/communist-league/1850-ad1.htm>; Herzen summarised in Monica Partridge, *Alexander Herzen 1812-1870* (Paris: UNESCO, 1984), 61.

opposition ideologies/movements³⁸⁷. The 1917 *Russian Revolution* was equally pedagogical. True to early progressive paradigm logics, communist strategists broadly assumed that the *Bolsheviks'* Russian victory would ignite a global revolution - the realisation of class interests in Russia gutting the Wests' capitalist establishment ideology and awakening the masses to their interests and potential³⁸⁸. Instead, the Bolsheviks had to fight a gruelling civil war against both establishment defenders and rival opposition ideologies/movements³⁸⁹, while expectations of global revolution faded as revolutionary fervour failed to materialise in many countries³⁹⁰ and, where it did materialise, was crushed by counterrevolutionary or rival ant-establishment fascist movements, often supported by working class elements³⁹¹. More generally, the post-French Revolutionary period was one of disappointment for revolutionaries: the masses frequently proving indifferent or even hostile to ideologies/movements³⁹² which,

³⁸⁷ Marx and Engels, *Revolution and Counter-revolution*, 5, 18; Friedrich Engels, "Introduction (1895)," in Karl Marx, *The Class Struggles in France, 1848-1850* (Marxist Archive, 2010 [1850]). Available at: https://www.marxists.org/archive/marx/works/download/pdf/Class_Struggles_in_France.pdf, 4; Marx, *The Eighteenth Brumaire*, 62-3; Edward Acton, *Alexander Herzen and the role of the intellectual revolutionary* (Cambridge: Cambridge University Press, 1979), 52-53; Barghoorn, "Russian Radicals," 346-353.

³⁸⁸ Notably Lenin and the Russian-born, German-naturalised Rosa Luxemburg – see: Silvio Pons, *The Global Revolution: A History of International Communism 1917–1991*, trans. Allan Cameron (Oxford: Oxford University Press, 2014), 5-11; Jean-François Fayet, "1919," in *The Oxford Handbook of the History of Communism*, ed. Stephen A. Smith (Oxford: Oxford University Press, 2014), 109.

³⁸⁹ Rationalising this unforeseen ordeal became a preoccupation of Leon Trotsky, who theorised about it in detail in a number of works, notably: Leon Trotsky, *History of the Russian Revolution*, trans. Max Eastman (London: Penguin Modern Classics, 1930) [Kindle]; and Leon Trotsky, "Hue and Cry over Kronstadt," *The New Internationalist* 4(4) (Apr., 1938): pp. 103-106. Available at: <https://www.marxists.org/archive/trotsky/1938/01/kronstadt.htm>. See Section 2.2.

³⁹⁰ Pons notes that, within Europe, only France, Germany and Czechoslovakia developed significant communist parties/or movements (over 100,000 members by his conceptualisation) in the immediate aftermath of the Russian Revolution; Italian, Yugoslav, and Bulgarian communist movements rallied around 10,000 members each while, throughout the rest of Europe, communist movements were "either weak or insignificant". See: Pons, *The Global Revolution*, 24-29. Moreover, in non-ethnic Russian territories of the crumbling Russian Empire, secessionist nationalism routinely trumped communism, with Poland actually rallying a massive nationalist popular mobilisation *against* communist advances (Ibid, 16 & 21).

³⁹¹ Notably the brief communist uprisings in different parts of Germany, Hungary and Italy were promptly crushed by reactionary forces and, eventually, fascism; often with the active support of large sections of the working class. Joseph A. Woolcock, "Politics, Ideology and Hegemony in Gramsci's Theory," *Social and Economic Studies* 34(3) (Sep., 1985), 200.

³⁹² Notably instances include the indifferent attitude of French workers and Italian peasants to socialist and nationalist insurrections respectively throughout the 1820s-30s (well summarised in Lindemann, *A History of European Socialism*; and Hobsbawm, *The Age of Revolution*). Meanwhile, Russian socialists during the 1870s encountered open hostility from the peasants they sought to reach out to, frequently finding themselves seized and handed over to the Tsarist police by those peasants – see: Lindemann, *A History of European Socialism*, 170. Provincial France during the 1848 revolutions was similarly characterised by hostility to revolutionary forces, with the peasant and petit bourgeois masses being easily won over to Louis Napoleon III's 'law and order' electoral platform which sought to suppress those social revolutionaries seeking to

from the revolutionaries' perspective, it was self-evidently in their best interests to embrace.

Responding to these lessons, various theories of ideological competition emerged – most explicitly articulated by Lenin³⁹³, Trotsky³⁹⁴, and Gramsci³⁹⁵ – that no longer considered the ideological arena as a dichotomy between self-evident tyranny and self-evident liberation, but rather as a complex, dynamic, and dialectical arena in which popular support was subject to various cultural-religious

threaten private property - Geoffrey Ellis, "The Revolution of 1848-1849 in France," in *The Revolutions in Europe, 1848–1849: From Reform to Reaction*, eds. Robert Evans and Hartmut Pogge von Strandmann (Oxford: Oxford University Press, 2002), 29 & 43.

³⁹³ Lenin rejected the determinism of orthodox Marxism, arguing that the experience of capitalism could not organically produce socialist ideological consciousness, only 'trade union consciousness', in which the workers would resist individual capitalists but not resist the capitalist system in its entirety. This stemmed in large measure from the way the bourgeois establishment ideology was so deeply embedded in society and was ever reified by the superior means of ideological production and dissemination available to the bourgeois class. Lenin thus proposed the need for a revolutionary 'vanguard party': a coterie of ideologically-conscious intellectuals and workers who, through various consciousness-raising strategies, could degrade faith in the establishment ideology and educate the masses in socialist ideology; thus fortifying them against be misled by "all sorts of demagogues [who can] side-track the more backward sections of the masses". These ideas were most clearly expressed in Lenin's magnum opus, *What is to be done?* (V. I. Lenin, *What is to be done?* (Marxists Internet Archive, 1902). Available at: <https://www.marxists.org/archive/lenin/works/download/what-itd.pdf>).

³⁹⁴ For Trotsky, the events leading up to and following the 1917 Russian Revolution demonstrated the complicated dynamics of the ideological arena. His 1930 book *History of the Russian Revolution* (Trotsky, *History of the Russian Revolution*) analysed these dynamics in detail, envisioning a contest between the establishment and various competing ideologies, all of whom seek by various means to secure and maintain the support of the essentially neutral and impressionable masses. According to Trotsky, ideologies did not only compete through the strength of their ideas, but also through their actions, with astute or flawed behaviour by an movement's cadres often proving as important in winning the support of the masses as the ideology itself. Moreover, the masses remained infected with old establishment-centric 'prejudices' which resurface in times of adversity, uncertainty or discouragement, lending defenders of the establishment an advantage over its detractors (Ibid, 28 & 458). I explore his conclusions in more detail in Section 2.3.

³⁹⁵ Gramsci, perhaps the most famous and enduring theorist of these dynamics, sought to understand why the Russian Revolution failed to spread successfully across Europe. He concluded that regimes do not secure and maintain power purely through coercion but also through persuasion. 'Hegemonic apparatuses' – comprising schools, churches, clubs, journals, cultural institutions, civil society organisations, pro-establishment intellectuals, etc. – disseminate and reify the 'hegemonic ideology' (i.e., the establishment ideology) as 'common-sense' to the people. Moreover, even if this hegemonic apparatus collapses or is discredited, and the 'common-sense' establishment ideology begins to fall into doubt among the masses, defenders of the establishment possess ample effective strategies for re-securing their hegemony, such as scapegoating campaigns or appeals to patriotism. For Gramsci, the success of revolution in Russia could be explained by the relatively weak hegemonic apparatus available to the Tsar, compared to those wielded by other, more resilient European regimes. See: David Leopold, "Marxism and Ideology: From Marx to Althusser," in *The Oxford Handbook of Political Ideologies*, eds. Michael Freeden and Marc Stears (Oxford: Oxford University Press, 2013), 28; Thomas R. Bates, "Gramsci and the Theory of Hegemony," *Journal of the History of Ideas* 36(2) (Apr.-Jun., 1975): pp. 351-366; Woolcock, "Politics, Ideology and Hegemony,"; Thomas J. Butko, "Revelation or revolution: a Gramscian approach to the rise of political Islam," *British Journal of Middle Eastern Studies* 31(1) (2004): pp. 141-162; William K. Carroll and R. S. Ratner, "Social Movements and Counter-Hegemony: Lessons from the Field," *New Proposals: Journal of Marxism and Interdisciplinary Inquiry* 4(1) (Oct., 2010): pp. 7-22.

hang-ups, influences, and manipulations, and could vacillate between rival ideological factions (both the establishment and multiple anti-establishment ideologies/movements) according to myriad variables rooted not solely in the validity of each ideology's ideas but also in the resources, abilities, conduct, mistakes, legacies, gestures, and manipulations of those championing them. Therefore, an ideology could not popularise merely by singing its virtues (nor the establishment ideology discredited merely by highlighting its flaws). Subsequently, much greater consideration was devoted to ascertaining how ideologies/movements can both discredit the establishment and garner and maintain popular support in the face of competition from establishment defenders and rival ideologies/movements³⁹⁶.

2.2.2. The counterinsurgent iteration:

As briefly noted in chapter 1, the Cold War's onset, and associated proliferation of non-domestic anti-colonial and communist ideologies/movements, prompted the development of a counterinsurgent iteration of the progressive paradigm. While still competing with conservative paradigm thinking³⁹⁷, it largely dominated

³⁹⁶ The most famous and influential such theories being those proposed by Lenin (Lenin, *What is to be done?*); Luxemburg (Luxemburg, *The Mass Strike*); Gramsci (Antonio Gramsci, *Selections from the Prison Notebooks*, eds. Quintin Hoare and Geoffrey Nowell-Smith (London: Lawrence and Wishart Limited, 1971 [1935])); Mao (Mao Tse-Tung, *On Guerrilla Warfare* (Maoist Documentation Project, 2000 [1937]). Available at: <https://www.marxists.org/reference/archive/mao/works/1937/guerrilla-warfare/>); Guevara (Guevara, *Guerrilla Warfare*), and, somewhat more loosely, the *Critical Theory* of the *Frankfurt School* (As Habermas concludes: "Critical Theory was initially developed in Horkheimer's circle to think through political disappointments at the absence of revolution in the West, the development of Stalinism in Soviet Russia, and the victory of fascism in Germany. It was supposed to explain mistaken Marxist prognoses, but without breaking with Marxist intentions" (Jürgen Habermas, *The Philosophical Discourse of Modernity: Twelve Lectures*, trans. Frederick Lawrence (Cambridge: Polity Press, 2007 [1985]), 91)).

³⁹⁷ In particular, dominant US understandings of communist IV in Latin America during the Cold War emphasised conservative paradigm themes of subversion and *ideological persuasion* by outside agitators at least in equal measure – if not greater measure – than progressive paradigm themes of extant grievances, loss of legitimacy, etc. See: Hal Brands, *Latin America's Cold War* (Cambridge: Harvard University Press, 2010), 71-73; J. Patrice McSherry, *Predatory States: Operation Condor and Covert War in Latin America* (Lanham, Maryland: Rowman & Littlefield Publishers, Inc., 2005), 1-4. Similarly, some scholars and officials applied conservative paradigm notions of individual 'vulnerability' to non-domestic IV, such as Almond's assertion that communist sympathisers in post-war Europe tended to be "alienated', 'deviational' or 'psychologically maladjusted'." – Almond quoted in Mark T. Berger, "Decolonisation, Modernisation and Nation-Building: Political Development Theory and the Appeal of Communism in Southeast Asia, 1945-1975," *Journal of Southeast Asian Studies* 34(3) (Oct., 2003), 443. More broadly, see Robin's critique of Cold War-era *behaviouralism* – which, as noted in chapter 1, perceived all ideological expression as a foil for common human behavioural impulses and/or psychological maladjustments - throughout Robin, *The Making of the Cold War Enemy*. Likewise, a tension remained in British thinking towards colonial insurgencies – divided between a progressive paradigm, grievance-acknowledging camp and a lesser but still significant conservative paradigm camp who denounced insurgents as "thugs and criminals, [...] misfits maladjusted to normal

strategic thinking in these non-domestic domains. Notably, as a framework for understanding *non-domestic* IV, it was often favoured by those same individuals favouring conservative paradigm understandings of *domestic* IV (for reasons that will become apparent). However, its conceptualisation of *non-domestic* IV contrasted with conservative paradigm understandings of *domestic* IV in several ways:

Firstly, as noted, in contradistinction to the conservative paradigm, extant macroscopic grievances necessarily *precede* ideological-popularisation. Specifically, IV/ideological-popularisation occurs only when existing authorities lose legitimacy; typically because of unjust, corrupt, and/or inefficient rule. Such legitimacy crises create novel openings (somewhat akin to a macroscopic version of RVE's 'cognitive openings') for ordinarily-marginal ideologies/movements to garner support by plausibly presenting themselves as agents of deliverance and benevolence: offering a new system to enhance the population's quality of life, alongside leadership pledged to effectively delivering that new system and subsequently ruling with greater justice and efficiency, and less corruption, than the traditional authorities. Absent these crisis conditions, ideologies lack persuasive power³⁹⁸.

society, the selfish, the too ambitious, and the discontented or the ill-advised" (David French, *The British Way in Counter-Insurgency, 1945-1967* (Oxford: Oxford University Press, 2011), 60).

³⁹⁸ This is stated explicitly in much military doctrine during this period. For example, in 1962, British troops stationed in Malaya following the *Malayan Emergency* (1948-1960) were instructed that "We cannot win counter-insurgency operations without helping to eliminate the poverty, disease, illiteracy and social inequality that breeds unrest" (quoted in French, *The British Way*, 64). That same year, the *US National Security Action Memorandum 182* [NSAM 182] attributed the causation of insurgencies to "the inadequacies of the local government to requite or remove popular or group dissatisfactions" – a sentiment echoed in the conterminous 1962 US Army *FM 100-5, Field Service Regulations-Operations* (February 1962), which asserted that: "The fundamental cause of large-scale irregular activities stems from the dissatisfaction of some significant portion of the population." A 1968 update of this handbook further clarified the issue, stating "the basic causes of insurgency are the existence of one or more grievances and lack of faith in the government's ability or desire to correct them" (all quoted in Austin Long, *Doctrine of Eternal Recurrence: The U.S. Military and Counterinsurgency Doctrine, 1960–1970 and 2003–2006* (Santa Monica, CA: RAND Corporation, 2008), 5-16). Perhaps the most emphatic articulation, however, featured in the forward to a translation of Mao's *On Guerrilla Warfare* commissioned by the *US Marine Corps* [USMC]. Translator Brigadier General Samuel B. Griffith introduced the translation by sympathetically declaring that "several hundred millions less fortunate than we have arrived, perhaps reluctantly, at the conclusion that the Western peoples are dedicated to the perpetuation of the political, social, and economic status quo. [...] many of them feel that these aims can be achieved only by a desperate revolutionary struggle [...] A potential revolutionary situation exists in any country where the government consistently fails in its obligation to ensure at least a minimally decent standard of life for the great majority of its citizens [...] To the illiterate and destitute, it [communist revolution] represents a package of promises that experience tells them will never be fulfilled." See: Brigadier General Samuel B. Griffith, USMC (Retired), "Introduction," in Mao Tse-Tung, *On Guerrilla Warfare*, trans. Brigadier General Samuel B. Griffith, USMC (Retired) (Washington, DC: Headquarters United States Marine Corps, 1989), 5-6.

Accordingly, in contrast to the conservative paradigm, support for ideologies/movements is rational and conditional³⁹⁹ (if possibly misguided), based on a continuous process of rational choice evaluation as to where one's best interests lie⁴⁰⁰ (supporters motivated by safety, sustenance, and stability rather than abstract ideals, self-actualisation, or bigoted totalitarianism). This focus on material interests often manifests in actively downplaying *ideological persuasion* – even as a *post facto rationalisation* dynamic – with support for ideologies/movements based primarily or completely on its ability to satisfy the immediate material needs of the population (i.e., bread and protection) rather than on its ideological vision⁴⁰¹. Thus, the population's sentiments are contingent, pliable, and constantly hedging between the ideology/movement and the establishment⁴⁰². Otherwise stated, while the conservative paradigm sees IV-perpetrators as irrational fanatics impervious to material inducements, this progressive paradigm iteration views material inducements as the *crucial* determinant of the population's loyalties⁴⁰³.

Finally, while the conservative paradigm understands IV to be a fringe phenomenon involving only 'vulnerable' individuals, this iteration views as 'vulnerable' the entire population – or at least significant demographic groups within it (typically marginalised socioeconomic or ethno-religious groups)⁴⁰⁴. Thus, 'vulnerability' is macroscopic rather than microscopic.

This iteration is progressive in its insistence upon the necessity of grievances/legitimacy-breakdown preceding *ideological persuasion* but establishment ideology-normative in the way it understands legitimacy: i.e., legitimacy rests on efficient and representative governance – according to a *Lockean* social contract – best secured through the West's liberal democratic,

³⁹⁹ Rather than irrational and fanatical.

⁴⁰⁰ French, *The British Way*, 65; Robin, *The Making of the Cold War Enemy*, 11.

⁴⁰¹ Griffith, USMC (Retired), "Introduction," 6; Oscar Palma Morales, "The Evolution of Counterinsurgency warfare: a historical overview," *Revista* 6(2) (Jul.-Dec., 2011), 203; David Galula, *Counterinsurgency Warfare: Theory and Practice* (Westport, CT: Praeger Security International, 2006 [1964]), 9; Michael Fitzsimmons, "Hard Hearts and Open Minds? Governance, Identity and the Intellectual Foundations of Counterinsurgency Strategy," *Journal of Strategic Studies* 31(3) (2008), 347.

⁴⁰² Galula, *Counterinsurgency Warfare*, 9 & 53; Fitzsimmons, "Hard Hearts and Open Minds?" 341-347; Robin, *The Making of the Cold War Enemy*, 188.

⁴⁰³ See below.

⁴⁰⁴ James S. Corum, "Development of Modern Counterinsurgency Theory and Doctrine," in *The Ashgate Research Companion to Modern Warfare*, eds. George Kassimeris and John Buckley (London: Routledge 2010), 39; Long, *Doctrine of Eternal Recurrence*, 5.

free-market capitalist establishment ideology⁴⁰⁵. Non-domestic legitimacy crises result from an *absence* of this Western establishment ideology (e.g., its disruption in war-torn post-war Europe; its absence/stunting in the colonies and developing world)⁴⁰⁶. This was explicit under *Modernisation Theory* [MT] which, during the 1960s, dominated US thinking on non-domestic ideological-popularisation. MT attributed the apparent vulnerability of developing world populations to communism to rapid, partial, and/or uneven modernisation in those locales. This created stress, fragility, upheaval, rootlessness, and dislocation as old traditions, ways of life, identities, loyalties, and legitimacies were destroyed while a lag existed before modern alternatives (conceived teleologically in terms of Western modernity, as exemplified by the US) could take their place. This gap constituted a time of vulnerability in which ideologies/movements like communism could fleetingly depict themselves as agents of deliverance⁴⁰⁷. Moreover, ideologies/movements offered surrogate identities and a sense of stability and empowerment for individuals suffering the ‘growing pains’ of modernisation⁴⁰⁸. Such discontent would evaporate once developing societies completed this modernisation, with all its benefits. Thus, this iteration was ideologically-seductive to those same individuals who embraced conservative paradigm understandings of domestic IV: in both cases, the West’s establishment ideology was upheld as sacrosanct.

This iteration appears to have initially developed in an *ad hoc* manner prior to its doctrinal and social-scientific consolidation throughout the 1960s⁴⁰⁹. Its first

⁴⁰⁵ Fitzsimmons, “Hard Hearts and Open Minds?” 337 & 343; French, *The British*, 3 & 59.

⁴⁰⁶ See below.

⁴⁰⁷ Fitzsimmons, “Hard Hearts and Open Minds?” 344-351; Berger, “Decolonisation,” 423, 429-437; Paul B. Rich, “A historical overview of US counter-insurgency,” *Small Wars & Insurgencies* 25(1) (2014), 16; Martin G. Clemis, “Crafting non-kinetic warfare: the academic-military nexus in US counterinsurgency doctrine,” *Small Wars & Insurgencies* 20(1) (2009), 163-164; Austin Long, “Counter Insurgency,” in *The Oxford Handbook of International Security*, eds. Alexandra Gheciu and William C. Wohlforth (Oxford: Oxford University Press, 2018), 549; and Robin, *The Making of the Cold War Enemy*, 32.

⁴⁰⁸ *Ibid.*

⁴⁰⁹ Broadly, individual military practitioners and policymakers drew their own conclusions about the role played by extant macroscopic grievances in motivating IV-perpetration or ideological-popularisation and forged counterinsurgent strategies accordingly. Such campaigns were, however, idiosyncratic and generally exceptions to the rule and were not institutionalised, prior to the Cold War. Notable examples include French General Hoche during the Vendee Revolt (1793-96); French Marshall Suchet during the Peninsula campaign of the Napoleonic Wars (1808-1814); British Army Colonel Sandeman policing the Punjab in the 1860s; the USMC during the post-American-Spanish War occupation of the Philippines (1899-1902); the USMC during the Sandino insurrection in Nicaragua (1927); British Army Major B.C. Denning in his recommendations of the same year; and British Army Colonel Bruce on the Indian Frontier in 1930. See: Morales, “The

significant overt expression seems to have occurred in the 1947 *Truman Doctrine*, in which US President Truman asserted: “The seeds of totalitarian regimes [read: communism] are nurtured by misery and want. They spread and grow in the evil soil of poverty and strife. They reach their full growth when the hope of a people for a better life has died⁴¹⁰”. This logic drove the *Marshall Plan*, intended to prevent famine in war-ravaged Europe and stimulate economic prosperity (demonstrating the overwhelming superiority of Western modernisation vis-à-vis the poverty of communist utopianism) to close the window of opportunity for communist popularisation⁴¹¹. Several factors influenced the development and subsequent broad acceptance of this iteration:

2.2.2.1. *The US strand:*

The US strand was primarily ideological in impetus. America’s sense of exceptionalism/manifest destiny encouraged a tendency to regard itself as the “summit” and guiding light of modernity, prosperity, and freedom, with a “mission to transform a world eager to learn the lessons only America could teach”⁴¹². Observing the locales where communism was popularising, it was easy and self-flattering to divine a correlation between ideological-popularisation and the absence of US-style modernity, prosperity, and freedom⁴¹³: Communism was popularising by exploiting misery and want, afflictions absent in the modern, free US. If such populations knew what they stood to gain from embracing US modernity, then cold, austere communism would lose all appeal. Though never phrased as such, this approach essentially mirrored the ideology-normative *insurgent* iteration’s conception of ideological competition, with US-modernity – the establishment ideology domestically - constituting a rival anti-establishment ideology to communism in non-domestic settings. This diagnosis moreover provided the US with a mission for the Cold War era – a justification for its

Evolution of Counterinsurgency,” 198-202; Simon Innes-Robbins, *Dirty Wars: A Century of Counterinsurgency* (Brimscombe Port Stroud: The History Press, 2016) [Kindle], Locations 394, 3220, 3239, 3388 & 4120; and Thomas R. Mockaitis, *British Counterinsurgency, 1919-60* (Basingstoke: The Macmillan Press Ltd., 1990), 64.

⁴¹⁰ “Truman Doctrine”. Truman was heavily influenced by the advice of US Diplomat to Russia George Kenan, who warned that “communism is like [a] malignant parasite which feeds only on diseased tissue” – quoted in Romero, “Cold War Anti-Communism,” 295.

⁴¹¹ Jessica C.E. Gienow-Hecht, “Culture and the Cold War in Europe” in *The Cambridge History of the Cold War: Vol. I: Origins*, eds. Melvyn P. Leffler and Odd Arne Westad (Cambridge: Cambridge University Press, 2010), 410; Melvyn P. Leffler, “The emergence of an American grand strategy, 1945-1952,” in *The Cambridge History of the Cold War: Vol. I: Origins*, eds. Melvyn P. Leffler and Odd Arne Westad (Cambridge: Cambridge University Press, 2010), 73.

⁴¹² Berger, “Decolonisation,” 421.

⁴¹³ As exemplified in *Modernisation Theory* discussed above.

hegemony – perceived as a duty to guide the rest of the world towards modernity and, by extension, stability⁴¹⁴.

Additionally, the US strand was influenced by academic involvement in policymaking throughout the 1950s/60s. The triumph of US technical innovations during the Second World War created enthusiasm for academic inputs in policymaking and, faced with the ideological battle of the Cold War, policymakers consulted social scientists to better understand human nature⁴¹⁵. A ‘military-academic-nexus’ patronised research-driven policymaking unprecedented in the West before or since⁴¹⁶. While behavioural psychologists typically forwarded conservative sub-paradigms⁴¹⁷, sociologists and area studies specialists proposed progressive sub-paradigms⁴¹⁸ - largely simply on account of the micro-focus of the former and macro-focus of the latter. Importantly, however, while research did drive policymaking, it was constrained to an establishment ideology-normative path, both by funding bodies skittish of establishment-challenging research and intimidation by the *House Committee on Un-American Activities*⁴¹⁹.

Finally, the US strand was reified by the successful US *counterinsurgency* [COIN] campaign against the *Huk* insurgency in the Philippines (1942–1954), in which the US successfully restored the indigenous regime’s legitimacy through a strategy of reform, development, and grievance addressing⁴²⁰. The US would regard the successful British ‘hearts and minds’ COIN strategy in Malaya (1948-1960) in yet higher regard, furthering this pragmatic reification⁴²¹.

2.2.2.2. *The British strand:*

The British strand was more complex and multivariate in conception:

⁴¹⁴ Ibid.

⁴¹⁵ Joy Rohde, “From Expert Democracy to Beltway Banditry: How the Antiwar Movement Expanded the Military-Academic-Industrial Complex,” in *Cold War Social Science: Knowledge Production, Liberal Democracy, and Human Nature*, eds by Mark Solovey and Hamilton Cravens (New York: Palgrave Macmillan, 2012), 138; Robin, *The Making of the Cold War Enemy*, 4; Clemis, “Crafting non-kinetic warfare,” 161-162.

⁴¹⁶ Discussed at length in Robin, *The Making of the Cold War Enemy*; Rohde, “From Expert Democracy,”; and Joy Rohde, “Gray Matters: Social Scientists, Military Patronage, and Democracy in the Cold War,” *The Journal of American History* 96(1) (Jun., 2009): pp. 99-122.

⁴¹⁷ See the critique throughout Robin, *The Making of the Cold War Enemy*.

⁴¹⁸ Long, *Doctrine of Eternal Recurrence*, 5.

⁴¹⁹ Robin, *The Making of the Cold War Enemy*, 33-36.

⁴²⁰ Thomas R. Mockaitis, “Trends in American Counterinsurgency,” in *The Routledge Handbook of Insurgency and Counterinsurgency*, eds. Paul B. Rich and Isabelle Duyvesteyn (Oxon: Routledge, 2012), 256.

⁴²¹ French, *The British Way*, 1-2; Mockaitis, *British Counterinsurgency*, 9.

It too had an ideological impetus as, like the US, the British could attribute non-domestic IV to an *absence* of the establishment ideology. Unrest in Malaya was attributed not to grievances against the colonial ideology but rather to the disruption of it; by the poor governance of its indigenous sultans⁴²² and/or the wartime Japanese occupation⁴²³. Similarly, the *Irish Troubles* were attributed to indigenous sectarian bigots whose thuggery and discrimination disrupted the establishment ideology's smooth functioning⁴²⁴. Additionally, attributing ideological-popularisation in the colonies to bread-and-butter grievances harmonised with the ideology of empire, in that "implicit in the concept of the 'white man's burden' was the idea of winning the hearts and minds of the people by bestowing upon them the blessings of Western civilization and convincing them of the advantages to be gained from British rule⁴²⁵". Thus, conveniently, grievances in the colonies did not result from colonial rule, but rather from the colonial mission's slow progress. Again, though not expressed as such, the colonial authorities essentially constituted a rival anti-*status quo* ideology to communism, competing against one-another to supplant a grievance-inducing 'reactionary' ideology of tribal backwardness. Following the Second World War, the ideology of empire began to shift, with newly-fashionable progressive and welfarist sentiments seeking to reframe the empire as a benevolent force working to raise indigenous living standards⁴²⁶. This was particularly true of the Labour governments of the immediate post-war period, who's traditional aversion to imperialism mellowed into a yearning for benevolent empire that redeemed the sins of the old imperialism⁴²⁷. COIN strategies based on improving the living standards of the 'natives' – and even an admission of past transgressions - were thus domestically palatable.

⁴²² French, *The British Way*, 13.

⁴²³ A.J. Stockwell, "A widespread and long-concocted plot to overthrow government in Malaya? the origins of the Malayan emergency," *The Journal of Imperial and Commonwealth History* 21(3) (1993), 68.

⁴²⁴ Sir Alistair Irwin and Mike Mahoney, "The military response," in *Combating Terrorism in Northern Ireland*, ed. James Dingley (Oxon and New York: Routledge, 2009), 213.

⁴²⁵ Mockaitis, *British Counterinsurgency*, 64.

⁴²⁶ Nicholas J. White, *Decolonisation: The British Experience Since 1945* (Oxon and New York: Routledge, 2013 [1999]), 10; Ronald Hyam, *Britain's Declining Empire: The Road to Decolonisation, 1918–1968* (Cambridge: Cambridge University Press, 2006), 47 and 86.

⁴²⁷ Hyam, *Britain's Declining Empire*, 94, 100 & 162; Frank Heinlein, *British Government Policy and Decolonisation 1945-1963: Scrutinising the Official Mind* (Oxon: Routledge, 2002), 28.

Also influential were pragmatic developments. On one hand, the British military stumbled upon this formula through trial-and-error⁴²⁸ and operational necessity. A lack of manpower and legal constraints on the use of force in colonised territories forced colonial administrations towards pragmatism, including acknowledging less politically-palatable causal dynamics of IV, notably grievances against colonial administration, etc⁴²⁹. On the other hand, advocacy towards combatting ideological-popularisation through improving the living standards of the people was rendered more pragmatically acceptable due to its consonance with already-acknowledged coterminous British realpolitik imperatives; both the need to silence international criticism of imperialism by re-portraying the empire as benevolent⁴³⁰; to cultivate friendly, stable post-colonial regimes supportive of British interests⁴³¹; and the need to economically-develop the colonies to buttress Britain's post-war economic recovery⁴³². Therefore, modelling COIN campaigns according to this logic killed several birds with one stone.

Finally, the apparent success of such strategies during the *Malayan Emergency* and other COIN campaigns reified it, with the added impetus that these successes flattered a British military keen to depict itself as an enlightened, benevolent, and world-leading innovator in the field⁴³³.

⁴²⁸ Initially, British COIN efforts had followed a logic of coercion, attributing IV to either religious fanaticism on the frontiers (see Chapter 1) and criminality or just an innate human tendency to rebel against authorities within the colonies themselves. This led to a “naughty boy” logic, whereby IV was to be combatted through coercion, “quelled just as schoolboys had to be disciplined” – see: Mockaitis, *British Counterinsurgency*, 65. See also: Innes-Robbins, *Dirty Wars*, Location 3854-3857; French, *The British Way*, 42 & 60; Stockwell, “A widespread and long-concocted plot,” 67; Hyam, *Britain's Declining Empire*, 35. The folly of such prescriptions was learned the hard way, with the negative blowbacks that followed the 1919 Indian *Amritsar Massacre* and repressive practices during the *Irish War of Independence* (1918-1921) convincing many that repression and a refusal to take grievances seriously only created greater problems for the future. See: Innes-Robbins, *Dirty Wars*, Location 4023; and Mockaitis, *British Counterinsurgency*, 20.

⁴²⁹ Warren Chin, “From Belfast to Lashkar Gar via Basra: British counterinsurgency today,” in *The Routledge Handbook of Insurgency and Counterinsurgency*, eds. Paul B. Rich and Isabelle Duyvesteyn (Oxon: Routledge, 2012), 276; and Mockaitis, *British Counterinsurgency*, 18 & 63.

⁴³⁰ D. George Boyce, *Decolonisation and the British Empire, 1775-1997* (Basingstoke: Macmillan Press Ltd., 1999), 110 & 113; White, *Decolonisation*, 6; Hyam, *Britain's Declining Empire*, 87.

⁴³¹ White, *Decolonisation*, 18; Frank Furedi, “Britain's Colonial Emergencies and the Invisible Nationalists,” *Journal of Historical Sociology* 2(3) (Sep., 1989), 240.

⁴³² White, *Decolonisation*, 15-16; Hyam, *Britain's Declining Empire*, 95 & 131.

⁴³³ As Mockaitis notes, “Between 1945 and 1960 [the British armed forces] conducted major counterinsurgency campaigns in Palestine, Malaya, Kenya, and Cyprus, and in all but Palestine they were successful [...] While not every campaign was a clear-cut victory, the British were far more successful in counterinsurgency than any other nation.” - Mockaitis, *British Counterinsurgency*, 12 & 100.

2.2.2.3. *Insurgent iteration influences:*

Insurgent iteration literature influenced *counterinsurgent* iteration thinking, particularly Mao, who's 'protracted war' strategy features in COIN literature to this day⁴³⁴. The success of Mao's strategy in China – and apparent proliferation among other insurgent movements throughout the 1950s/60s – provoked fears that Mao had developed an unbeatable insurgent strategy⁴³⁵. The US and UK consequently modelled their COIN strategies as direct antidotes to Mao's⁴³⁶, and his works, alongside those of other 'professional revolutionaries' (Guevara, Giap, Chinh, etc.) were added to military training syllabi⁴³⁷. They thus imbibed the foundational assumptions of these insurgent thinkers.

2.2.2.4. *Soldier-driven 'research', respect for the enemy, and the anti-colonial zeitgeist:*

Finally, willingness to acknowledge grievances as motivating non-domestic IV was facilitated by the fact that, in contrast to domestic IV and especially terrorism, a degree of respect and even sympathy was possible for insurgents - particularly anti-colonial ones (in US eyes at least)⁴³⁸. This was particularly true of many soldiers who played a leading role in developing this iteration, who often viewed

⁴³⁴ See, for example: Headquarters, U.S. Army Training and Doctrine Command, *FM 2-24/MCWP 3-33.5 Counterinsurgency* (Washington, DC: Marine Corps Warfighting Publication, 2006), 12:6; US Army, *FMI 3-24.2 (FM 90-8, FM 7-98): Tactics in Counterinsurgency* (Headquarters Department of the Army, 2009); NATO, AJP-3.4.4. *Allied Joint Doctrine for Counterinsurgency (COIN)* (2011). Available at: <https://info.publicintelligence.net/NATO-Counterinsurgency.pdf>. For a broader discussion on this trend, see: Francis Grice, *The Myth of Mao Zedong and Modern Insurgency* (Cham, Switzerland: Palgrave Macmillan, 2019), 3.

⁴³⁵ Andrew J. Birtle, *U.S. Army Counterinsurgency and Contingency Operations Doctrine 1942–1976* (Washington, DC: Center of Military History United States Army, 2006), 224-225; Mockaitis, *British Counterinsurgency*, 7-8.

⁴³⁶ Corum, "Development," 3; Paul Dixon, "Beyond Hearts and Minds: Perspectives on Counterinsurgency," in *The British Approach to Counterinsurgency: From Malaya and Northern Ireland to Iraq and Afghanistan*, ed. Paul Dixon (New York: Palgrave Macmillan, 2012), 62; Andrew J. Birtle, *U.S. Army Counterinsurgency and Contingency Operations Doctrine 1942–1976* (Washington, DC: Center of Military History United States Army, 2006), 225; Morales, "The Evolution of Counterinsurgency," 206.

⁴³⁷ Birtle, *U.S. Army Counterinsurgency*, 25, 229 & 261.

⁴³⁸ Political and popular sentiments in the US were decidedly anti-colonial during this period, to the extent that they frequently sympathised with anti-colonial insurgents (for as long as they remained nationalists and not communists) over their formal allies in France and the UK. In particular, US sympathies for Algerian guerrillas fighting for independence from French colonial rule was barely veiled. See: Rich, "A historical overview of US counter-insurgency," 17; David Kilcullen, "Counterinsurgency: the state of a controversial art," in *The Routledge Handbook of Insurgency and Counterinsurgency*, eds. Paul B. Rich and Isabelle Duyvesteyn (Oxon: Routledge, 2012), 134.

their insurgent adversaries as honourable foes fighting for an at least partially legitimate cause⁴³⁹.

The product of these inputs was 'classical' COIN doctrine. Based on this driving assumption that IV constitutes a rational if misguided response to legitimacy crises, 'classical' COIN perceives a need to compete with insurgent ideologies/movements to secure popular legitimacy⁴⁴⁰. Because legitimacy crises result from unjust, inefficient governance – abundantly failures to satisfy everyday 'bread-and-butter' needs – popular legitimacy is best secured by better satisfying those needs than the insurgent movement⁴⁴¹. Interventions thus include infrastructure-building projects (installing modern amenities like roads, schools, clinics, etc) to demonstrate to the population that they stand to gain more materially by siding with the counterinsurgents than the insurgents⁴⁴². Under MT, this involves a more holistic 'nation-building' effort to guide insurgency-stricken countries to modernity⁴⁴³. As noted, this approach downplays the importance of *ideological persuasion* beneath the business of satisfying material needs (actions speaking louder than words, vs. the conservative paradigm's words speaking louder than actions): because ideologies only become persuasive in conditions of legitimacy crisis, restoring legitimacy will render them unpersuasive once more. *Ideological persuasion* (through propaganda/counterpropaganda) is not entirely redundant. However, it is an auxiliary effort (seconded to the meeting of material needs), an interim effort (persuading the population to give counterinsurgent development initiatives a chance by regaling them with what they stand to gain) and focusses less on attempting to discredit the *ideology* (*à la* conservative paradigm) and more on discrediting the *movement* by persuading the population that the insurgents are not ideologically-sincere saviours but exploitative thugs/criminals hiding behind that ideology⁴⁴⁴ or, if sincere, then inept realisers of

⁴³⁹ French, *The British Way*, 42 & 69.

⁴⁴⁰ Fitzsimmons, "Hard Hearts and Open Minds?" 340; Morales, "The Evolution of Counterinsurgency," 203; French, *The British Way*, 2.

⁴⁴¹ Fitzsimmons, "Hard Hearts and Open Minds?" 337; Galula, *Counterinsurgency*, 9; French, *The British Way*, 3 & 174; Mockaitis, *British Counterinsurgency*, 9 & 63.

⁴⁴² *Ibid.*

⁴⁴³ Berger, "Decolonisation," 435-443; Fitzsimmons, "Hard Hearts and Open Minds?" 344 & 351.

⁴⁴⁴ During the Irish Troubles, for example, the British attempted to discredit the IRA as an movement by portraying its members not as nationalist heroes but as thugs and psychopaths – often by circulating fictitious stories of their alleged exploits (Jonathan Tonge, *Northern Ireland* (Cambridge and Malden: Polity Press, 2006), 76). Similarly, the US State Department's 1950s *Project Troy* sought to alienate people to the Soviet Union not by discrediting communism, but by discrediting Stalin as someone who had betrayed communism (Robin, *The Making of the Cold*

their utopia⁴⁴⁵. Otherwise stated, the aim of propaganda is not to pre-empt, undo, or out-do *ideological persuasion* of 'vulnerable' individuals (*à la* conservative paradigm), but to convince aggrieved, hedging communities that the establishment ideology – not the opposing ideology – holds the antidote to their very real woes.

Beyond COIN operations, this logic was applied to broader efforts to inhibit the spread of communism across post-war Europe and the developing and decolonising world. In addition to communism's exploitation of the deprivations and dislocations afflicting war-ravaged Europe and the modernising and/or decolonising Third World, an additional dimension was the ideological vacuum in these locales (the end of colonial rule in the developing world and collapse of fascism in central Europe), which had left ideological blank slates subject to 'sales pitches' from the competing Cold War ideological visions⁴⁴⁶. Thus, the same logic was applied: propaganda serving an interim purpose of informing hedging populations why the West's ideology could best resolve their material concerns – and why communism, despite its claims, could not⁴⁴⁷ – and a longer-term policy of economic development and modernisation intended to remove the crisis conditions providing a novel window for communism to sell itself as a saviour⁴⁴⁸.

War Enemy, 45). The CIA's *Radio Free Europe* meanwhile carried out a muck-raking campaign publishing abuses by specific communist officials – see: Cull and Mazumdar, "Propaganda," 328.

⁴⁴⁵ The *US Information Agency* sought for example not to discredit communism as an ideological programme but rather expose how poorly the Soviet Union was realising communism's targets (Robert J. McMahon, "US national security policy from Eisenhower to Kennedy," in *The Cambridge History of the Cold War: Vol. I: Origins*, eds. Melvyn P. Leffler and Odd Arne Westad (Cambridge: Cambridge University Press, 2010), 295); a strategy parroted in the US by Truman's 'Campaign of Truth', Reagan's circulating of fatalist Russian jokes about the dire conditions in the Soviet Union, and in the UK by *Information Research Department*. See: Cull and Mazumdar, "Propaganda," 327, 328 & 334.

⁴⁴⁶ Gienow-Hecht, "Culture," 110-113.

⁴⁴⁷ Cull and Mazumdar, "Propaganda," 327-328 & 332; Romero, "Cold War Anti-Communism," 304; McMahon, "US national security," 295.

⁴⁴⁸ Leffler, "The emergence of an American grand strategy, 1945-1952," 307; White, *Decolonisation*, 15-19.

This iteration – and ‘classical’ COIN doctrine in particular - was academically⁴⁴⁹ and doctrinally⁴⁵⁰ neglected following the *Vietnam War*. Nevertheless, it would maintain substantial *ad hoc* currency, informing understandings of certain non-domestic IV episodes; notably British government assumptions on the causation of IRA popular support during the Northern Irish *Troubles*⁴⁵¹, or Clinton’s take on the proliferation of Islamist movements throughout the 1990s Middle East, North Africa, and Central Asia⁴⁵². The iteration’s lessons and assumptions also found an afterlife in later peacebuilding and stabilisation doctrines, with greater nuance though less explicit focus on IV⁴⁵³. Only when US-led Coalition forces found themselves confronted with insurgencies in post-2001 Afghanistan and post-2003 Iraq, however, would these doctrines be hurriedly dusted off and adapted in a cohesive and formalised manner⁴⁵⁴. As we shall see in the next chapter, however, in the context of the GWOT, it became confusingly intertwined with

⁴⁴⁹ Academic interest in informing counterinsurgency and general Cold War policy declined as a result of a souring in academic-government relations; prompted by a broader wave of epistemic and moral critique that cautioned against supporting imperial practices or accepting epistemically-leading government/military research contracts (see below). See: Long, “Counter Insurgency,” 551; Rohde, “Gray Matters,”; Rohde, “From Expert Democracy,” 139; Mark Solovey, “Project Camelot and the 1960s Epistemological Revolution: Rethinking the Politics–Patronage–Social Science Nexus,” *Social Studies of Science* 31(2) (Apr., 2001): pp. 171–206.

⁴⁵⁰ On one hand, the heating up of the Cold War with the establishment of the *Warsaw Pact* redirected the attention of the US and its allies to conventional warfare. Additionally, however, the failure of COIN in Vietnam and elsewhere had left a bitter taste in the mouth of the US military, provoking a desire to relegate COIN to a misguided misadventure and refocus on ‘real soldiering’. See: Douglas Porch, *Counterinsurgency: Exposing the Myths of the New Way of War* (Cambridge: Cambridge University Press, 2013), 289-291; Rich and Duyvesteyn, “The study of insurgency and counterinsurgency,” 10; Mockaitis, “Trends in American Counterinsurgency,” 251; and Innes-Robbins, *Dirty Wars*, Locations 4895 & 4918.

⁴⁵¹ Successive British governments approached the Irish *Troubles* with the mantra “peace through prosperity”, and accordingly earmarked large financial packages for attracting investment, improving housing, education, opportunities, and services, etc., all in the name of degrading the persuasive appeal of sectarian paramilitary groups in the region. See: Peter R. Neumann, “The government’s response,” in *Combating Terrorism in Northern Ireland*, ed. James Dingley (Oxon and New York: Routledge, 2009), 145; Irwin and Mahoney, “The military response,” 214.

⁴⁵² The Bush Snr., and, particularly, the Clinton administration sought to explain the rapid proliferation of Islamist movements in the 1990s Middle East and North Africa by asserting that “the roots of extremism and terror’ were to be found in ‘economic stagnation and poverty,’ not religion” – Secretary of State Warren Christopher, quoted and paraphrased in Little, *Us versus Them*, 122.

⁴⁵³ Long has described these fields – which broadly crystallised in the 1990s and early 2000s – as “an intellectual heir to the Cold War-focused study of counter insurgency but with different agendas (and intellectual baggage)”. Long, “Counter Insurgency,” 554. Other sources note a continuity in assumptions and even terminology, such as a focus on the necessity of resolving macroscopic grievances and ‘winning hearts and minds’. See: Sarah Collinson, et al., “States of fragility: stabilisation and its implications for humanitarian action,” *Disasters* 34(3) (2010), 279; Stuart Gordon, “The United Kingdom’s stabilisation model and Afghanistan: the impact on humanitarian actors,” *Disasters* 34(3) (2010), 368-370.

⁴⁵⁴ See Chapter 3.

conservative paradigm constructs of the 'Islamic extremist', resulting in the seductive but deeply-flawed, synthesising hybrid paradigm.

2.2.3. The 'observer' iteration:

Progressive paradigm academic and journalistic IV research/commentary constitutes a broad church that defies easy condensing and categorisation. It emanates from various fields – *History, Sociology, Psychology(s), Social Movement Studies, Revolution Studies, Contentious Politics, Area Studies, Anthropology, Evolutionary Psychology, Gender Studies, Philosophy, Literary Criticism*, etc. – and postulates numerous sub-paradigms based on multiple methodologies, case-studies, imaginaries, etc. It broadly resembles 'classical' COIN in considering IV a rational response to legitimacy crises resulting from macroscopic grievances/injustices, with the remedial mantra remaining one of 'if we rescue the people from their woes then unsavory ideological movements will be denied the opportunity to offer the same service'. Academic research does, however, provide more sophisticated understandings of these basic processes/mechanisms, considering a broader, more nuanced variety of potential grievances and triggers (notably at the environmental and transactional/relational levels), conceptualisations of legitimacy, mechanisms of ideological-popularisation and mobilisation, theories of emotional attraction and attachment, and remedial repertoires⁴⁵⁵. Additionally, it draws upon more diverse IV case-studies, considering civil wars, revolutions, riots, communal conflicts, terrorism, etc., in addition to insurgencies. From an ideological standpoint, research varies – depending on the researcher and case-study – between the establishment-normativity of COIN and the anti-establishment-normativity of the 'professional revolutionaries'; most work occupying a nebulous middle-ground that views IV as lamentable, misguided yet rational and deserving of some degree of sympathy if not condoning.

Unsurprisingly, this strand has an *ad hoc* and diffuse genealogy. Of particular importance, however, are the following developments and inputs:

2.2.3.1. *Marxist historiography:*

⁴⁵⁵ See Section 1.3.

The first concerted academic expressions of the progressive paradigm emanated from a coterie of loosely affiliated Marxist historians, commencing in the 1920s⁴⁵⁶ and gaining steam post-*World War Two*⁴⁵⁷. These scholars inaugurated a historical turn in the study of ‘crowd’ IV which had previously been the near exclusive domain of conservative paradigm-leaning psychologists and criminologists⁴⁵⁸. These conventional wisdoms – chiefly *crowd psychology*, *structural-functionalism* and ‘riff-raff’ theory⁴⁵⁹ - were explicitly challenged by these historians, who sought to demonstrate the rationality of IV through empirical studies of historical episodes of IV such as revolutions (particularly the 1789 *French revolution*) and more general violent ‘collective bargaining’ by workers/peasants against their exploiters⁴⁶⁰.

In part, these historians were ideologically influenced. Pioneering this movement were avowed socialists, the majority – notably Rudé, Hobsbawm, Hill, and Thompson – members of the British *Communist Party Historians’ Group*⁴⁶¹. This doubly predisposed them towards progressive paradigm explanations:

⁴⁵⁶ French historian Georges Lefebvre is generally regarded as the founder of this movement, initially with his path-breaking 1924 doctoral dissertation and, more prolifically and enduringly, with his highly influential 1932 study: Georges Lefebvre, *The Great Fear of 1789: Rural Panic in Revolutionary France*, trans. Joan White (New York: Vintage Books, 1973 [1932]). See: George Rudé, “Interpretations of the French Revolution,” *Historical Association Pamphlet* 47 (1961). Available at: <https://www.marxists.org/subject/france/rude/french-revolution.htm>; George Rudé, “Introduction the English edition,” in Georges Lefebvre, *The Great Fear of 1789: Rural Panic in Revolutionary France*, trans. Joan White (New York: Vintage Books, 1973 [1932]), ix-xv; Robert J. Holton, “The Crowd in History: Some Problems of Theory and Method,” *Social History* 3(2) (May, 1978), 220; Borch, *The Politics of Crowds*, 11; Timothy Tackett, “Introduction,” in George Lefebvre, *The Coming of the French Revolution*, trans. R.R. Palmer (Princeton and Oxford: Princeton University Press, 2005 [1939]), xxi.

⁴⁵⁷ As Perry notes, prior to the Second World War, Marxist historians “had been neither academics nor professional historians; they were revolutionaries [...] After the Second World War, this was to change. In this period a generation of academic Marxists emerged and matured.” (Matt Perry, *Marxism and History* (Basingstoke: Palgrave, 2002), 88). This generation consolidated around the British *Communist Party Historians’ Group* [CPHG], established in 1946 and including such influential scholars as Lefebvre-protégé George Rudé, alongside Eric Hobsbawm, E.P. Thompson, Christopher Hill, etc. See: Nicholas Rogers, “Obituary: George Rudé (1910-1993),” *Labour/Le Travail* 33 (Spring, 1994), 10; Ball, “Violent Urban Disturbance,” 51; Anna Green and Kathleen Troup, *The Houses of History: A Critical reader in twentieth-century history and theory* (Manchester: Manchester University Press, 1999), 33.

⁴⁵⁸ As discussed in Chapter 1. This historical turn is noted in Ball, “Violent Urban Disturbance,” 51; and Andrew Charlesworth, “Essays in review: George Rudé and the anatomy of the crowd,” *Labour History Review* 55(3) (1990), 27.

⁴⁵⁹ See chapter 1.

⁴⁶⁰ See for example: E. J. Hobsbawm, “The machine-breakers,” *Past & Present* 1 (Feb., 1952), 57; E.P. Thompson, “The Moral Economy of the English crowd in the eighteenth century,” *Past and Present* 50 (Feb., 1971), 76. For secondary source discussions on this trend, see: Ball, “Violent Urban Disturbance,” 51; Charlesworth, “Essays in review,” 27; Rudé, “Introduction,” ix & xv; Waddington and King, “The Disorderly Crowd,” 492; Holton, “The Crowd in History,” 220; David R. Mansley, *Collective Violence, Democracy and Protest Policing* (Oxon: Routledge, 2014), 17 & 23; and Borch, *The Politics of Crowds*, 11.

⁴⁶¹ See footnote 453 above.

firstly, as members/supporters of an ideological movement themselves – and one which considered itself heir to French Revolutionary Jacobinism and Russian Revolutionary Bolshevism – they were contemptuous towards conservative paradigm explanations which delegitimisingly attributed such episodes to irrational, deviant, and/or criminal behaviour⁴⁶². Secondly, as Marxists they drew upon the intellectual heritage of ‘professional revolutionaries’ like Marx, Engels, and Lenin, whose works they considered as “scientifically based theory, allowing for objective insights and being superior to bourgeois concepts of history⁴⁶³”.

They were not, however, unquestioning slaves to canon and, particularly after the Soviet Union’s alienating suppression of the 1956 *Hungarian Uprising*, refused to kowtow to *Comintern* dogma⁴⁶⁴. Obituaries to these scholars uniformly stress their fealty to scientific method which trumped, tempered, and nuanced their ideological beliefs⁴⁶⁵. This methodological integrity enabled them to convincingly challenge conservative paradigm conventional wisdoms beyond their own ideological milieu. On one hand, rigorous empirical fact-checking refuted conservative paradigm claims that historical episodes of IV had been irrational, whipped up by ‘outside agitators’ or demagogues, and/or mere covers for ‘riff-raff’ intent on criminal behaviour⁴⁶⁶. On the other, inductive theorising from

⁴⁶² Stephen Reicher, “‘The Crowd’ century: Reconciling practical success with theoretical failure,” *British Journal of Social Psychology* 35 (1996), 539.

⁴⁶³ Thomas Kroll, “Marxist Historians, Communist Historical Cultures and Transnational Relations in Western Europe in the 1950s and 1960s,” in *Marxist Historical Cultures and Social Movements during the Cold War: Case Studies from Germany, Italy and Other Western European States*, eds. Stefan Berger Christoph Cornelissen (Cham: Palgrave Macmillan, 2019), 67. See also: Rudé, “Interpretations of the French Revolution,”; Peter M. Jones, “Georges Lefebvre and the Peasant Revolution: Fifty Years on,” *French Historical Studies* 16(3) (Spring, 1990), 646; Tackett, “Introduction,” x; Ball, “Violent Urban Disturbance,” 52; Charlesworth, “Essays in review,” 27-28; Owen Jones, “Introduction to the 2017 Edition,” in Eric Hobsbawm, *Primitive Rebels* (London: Abacus, 2017 [1959]) [Kindle], Location 127.

⁴⁶⁴ Perry, *Marxism and History*, 88.

⁴⁶⁵ For example, on Lefebvre, see: Jones, “Georges Lefebvre,” 646; and Tackett, “Introduction,” x; on E.P. Thompson, see: Ball, “Violent Urban Disturbance,” 53-54; and Marc Edelman, “E. P. Thompson and Moral Economies,” in *A Companion to Moral Anthropology*, ed. Didier Fassin (Hoboken, New Jersey: Wiley & Sons, Inc., 2012), 51; on Hobsbawm see: Jones, “Introduction to the 2017 Edition,” Location 127.

⁴⁶⁶ For example, Rudé interrogated trial records of those arrested for participation in riots during the French Revolutionary era and the British 1780 Gordon Riots and found that, in contrast to conservative paradigm claims, perpetrators typically 1) shared common socioeconomic grievances that united them around the issue at hand (rather than being riff-raff whipped into hysteria by agitators/demagogues or else using claimed grievances as a cover for criminal behaviour); 2) rarely had prior criminal convictions and frequently possessed testimonials of good character from their employers (rather than being deviants and opportunist criminals); and 3) consistently dwelt within the community where the rioting took place (rather than being criminal outsiders seeking cover for criminal activities, or else rent-a-mobs deployed by demagogic elites). See: Charlesworth, “Essays in review,” 27-28; Mansley, *Collective Violence*, 24; Borch, *The Politics of Crowds*, 11. Similarly, Thompson found that, rather than being criminally-minded or a crazed mob, bread rioters in Britain typically acted in highly disciplined and measured ways,

empirical evidence spawned convincing, progressive counter-theories, such as Lefebvre's charting of revolutionary processes to refute conservative paradigm narratives of 'crowd' IV as acontextual, momentary losses of sanity⁴⁶⁷; Thompson's revelations that peasant grain seizures typically unfolded in a highly formulaic, disciplined, and proportionate way that sought to *defend*, not upend, traditional values and mores⁴⁶⁸; and Hobsbawm's arguments that peasant rioters generally exhibited reformist rather than revolutionary or destructive-aggressive motives, with the 'riot' merely constituting the most effective available means of collective bargaining, rendering it a rational strategy rather than irrational paroxysm⁴⁶⁹.

The movement's influence extended well beyond the Marxist milieu, popularising a new Marxist orthodoxy in the academic study of historical revolutions⁴⁷⁰, while helping to popularise Marxist social theory across the history profession more broadly⁴⁷¹. According to Ball⁴⁷², Tackett⁴⁷³, and Charlesworth⁴⁷⁴, moreover, these studies set the parameters and agendas for later emergent fields such as *Social Movement Theory*, *Revolution Studies* and *Contentious Politics* (see below), and provided interpretive frameworks and comparators for studying contemporary episodes of 'crowd' IV, notably the US race riots of the 1960s and broader 'new social movements' of that decade, alongside 'Third Worldist' anticolonial and/or socialist guerrilla movements (see below). At the broadest level, these scholars were the first academics to "ennoble the resistance and non-conformity of bandits, peasants, artisans, industrial workers, poachers, religious millenarians and transportees"⁴⁷⁵; thus establishing the sympathetic or semi-

selectively targeting their victims and acting in such a way as to make their point – a defence of traditional values on peasant–merchant/landlord relations – clear. Most strikingly, he found that grain seized in bread riots was rarely stolen, but in fact sold *on behalf* of the merchant/landlord at traditional prices. See: Mansley, *Collective Violence*, 24; Borch, *The Politics of Crowds*, 11; Ball, "Violent Urban Disturbance," 55; and Stott and Drury, "Contemporary understanding," 10.

⁴⁶⁷ Rudé, "Introduction the English edition," xv; Holton, "The Crowd in History," 220.

⁴⁶⁸ Thompson, "The Moral Economy."

⁴⁶⁹ Mansley, *Collective Violence*, 23; and Borch, *The Politics of Crowds*, 11.

⁴⁷⁰ As attested by: Rudé, "Interpretations of the French Revolution,"; Charlesworth, "Essays in review," 27; Rogers, "Obituary: George Rudé," 10; and Tackett, "Introduction," xxi.

⁴⁷¹ As Marwick notes, "most historians have in some way or another been affected by some aspect of Marxist thinking." – quoted in Green and Troup, *The Houses of History*, 33.

⁴⁷² Ball, "Violent Urban Disturbances," 55-56.

⁴⁷³ Tackett, "Introduction," xxi.

⁴⁷⁴ Charlesworth, "Essays in review," 27.

⁴⁷⁵ Perry, *Marxism and History*, 88.

sympathetic IV imaginary that would mark progressive paradigm scholarship and journalism over the generations that followed⁴⁷⁶.

2.2.3.2. *The anti-conservative paradigm 'New Left' Revolt:*

These Marxist-leaning progressive paradigm theories would be reified for, and expanded upon by, an entire generation of US social science students throughout the 1960s-70s, who, as graduates, would later shape the emergent IV-oriented fields of *Social Movement Theory*, *Revolution Studies*, and *Contentious Politics*, as well as constituting a new generation of *Area Studies* specialists (see below). This process of reification was both experiential and ideological:

At the experiential level, academics and students observing (and often participating in) crowd behaviour – at times violent - in the 1960s questioned conservative paradigm orthodoxy (chiefly structural-functionalism and 'riff-raff' theory) which corresponded little to their lived experiences⁴⁷⁷. They were vindicated by the prolific *Kerner Commission Report* (1968)⁴⁷⁸ which, in its exploration of the 1960s race riots, challenged conservative paradigm assumptions that the violence had been whipped up by criminal/extremist 'outside agitators' or perpetrated by deviant 'riff-raff', attributing it instead to a desperate but rational response to legitimate macroscopic grievances such as systemic racial discrimination, socioeconomic deprivation, and police brutality⁴⁷⁹.

⁴⁷⁶ As will become clear throughout this chapter.

⁴⁷⁷ McPhail probably conveys this sentiment best when he notes that: "observers were outraged by the discrepancies between what they saw and heard taking place around them and the common sense/social science stereotypes of crowd participants and behaviours" (C. McPhail, *The Myth of the Madding Crowd* (New York: Aldine de Gruyter, 1991), xxii.). See also: Drury & Stott, "Contextualising the crowd," 280.

⁴⁷⁸ The National Advisory Commission on Civil Disorders, *The Kerner Report*, ed. Sean Wilentz (Princeton and Oxford: Princeton University Press, 2016 [1968]).

⁴⁷⁹ The commissioners employed a methodology similar to that of Rudé, empirically developing a profile of the 'average rioter' and concluding from it that, far from criminal riff-raff or outsiders, almost all rioters had been "economically on a par with the average non-rioter, [...] comparatively better educated, politically more active, and invariably a lifelong resident of the city" (quoted in Ball, "Violent Urban Disturbance," 59, see also: Waddington and King, "The Disorderly Crowd," 493). The report, commissioned by the Johnson administration but subsequently suppressed due to its politically contentious conclusions, was leaked and published in book form by Bantam Press, where it became an instant best seller and became a frequent talking point on TV and radio (Julian E. Zelizer, "Introduction to the 2016 Edition," in *The National Advisory Commission on Civil Disorders, The Kerner Report*, ed. Sean Wilentz (Princeton and Oxford: Princeton University Press, 2016 [1968]), xxx-xxxii; John H. Stansfield, "Kerner Commission Report (1968)," in *Race and Racism in the United States: An Encyclopedia of the American Mosaic, Vol. 1: A-E*, eds. Charles A. Gallagher and Cameron D. Lippard (Santa Barbara, CA: Greenwood, 2014), 660; Rick Loessberg and John Koskinen, "Measuring the Distance: The Legacy of the Kerner Report," *RSF: The Russell Sage Foundation Journal of the Social Sciences* 4(6) (Sep., 2018), 99;). As the Bantam Press edition's editor noted, the Kerner Commission Report's conclusions were added extra gravity on account that they had been proposed by "part of the political establishment, not

This cohort was, however, predisposed to accept these progressive paradigm explanations by their ideological convictions. The 1960s saw the breakdown of the ‘post-war consensus’ which had been characterised by “a widespread faith in the [US] nation’s basic goodness⁴⁸⁰” and “a widespread belief that industrialised societies were harmonious social systems which, internally at least, contained no major opposition forces⁴⁸¹” other than criminal deviants or communist subversives – à la contemporary conservative sub-paradigms. Between economic depression⁴⁸², highly-televised violent repression of civil rights activists⁴⁸³ and war crimes, brutal tactics, and strategic reverses in the Vietnam War⁴⁸⁴, a new, unprecedented discourse emerged in the US and Europe that “in virtually every action, their own government was wrong⁴⁸⁵”. More specifically, there proliferated among students and academics a loosely Marxist (but anti-Soviet) ‘New Left’ ideology which, among other things, reinterpreted the Cold War not as a defence of freedom against totalitarianism but as a cover for

radical intellectuals or bomb-throwing activists” (paraphrased in Zelizer, “Introduction to the 2016 Edition,” xxxiv). The report is credited with both setting the tone for future discussions on racial violence (and ‘crowd’ IV more broadly) and motivating a wave of successor studies on the phenomenon. See: Stansfield, “Kerner Commission Report (1968),” 660; and Ball, “Violent Urban Disturbance,” 57-60.

⁴⁸⁰ Mark Solovey, “Cold War Social Science: Specter, Reality, or Useful Concept?,” in *Cold War Social Science: Knowledge Production, Liberal Democracy, and Human Nature*, eds by Mark Solovey and Hamilton Cravens (New York: Palgrave Macmillan, 2012), 4.

⁴⁸¹ George N. Katsiaficas, *The Imagination of the New Left: A Global Analysis of 1968* (Cambridge, MA: South End Press, 1987), 6.

⁴⁸² Carole Fink, et al., “Introduction,” in *1968: The World Transformed*, eds. Carole Fink, Philipp Gassert, and Detlef Junker (Cambridge: Cambridge University Press, 1999 [1998]), 8.

⁴⁸³ Max Elbaum, *Revolution in the Air: Sixties Radicals turn to Lenin, Mao and Che* (London and New York: Verso, 2018 [2002]) [Kindle], 15-16.

⁴⁸⁴ The Vietnam war played a significant role in the breakdown of the ‘post-war consensus’ and popularisation of the ‘New Left’ and its critique of US foreign policy as imperialism. Fink has written particularly elegantly of the way televised footage of the brutal conduct of the war ‘tarnished the once shining image of the United States’, discrediting “America’s official mission, to defend the freedom, democracy, and self-determination of the South Vietnamese people” as it instead became an “accomplice to brutal human rights violations” and the prop of a non-democratic South Vietnamese regime (Fink, et al., “Introduction,” 11 & 26). More scathingly still, Katsiaficas relates how “Vietnam provided a clear dividing line between those who were ‘part of the problem’ [the US] and those who were ‘part of the solution’ [Ho Chi Minh] [...] [and] dramatized the gap between the deeply ingrained notion that the US is a free country and the all-too-evident reality that the US government was committing the genocidal destruction of an entire nation” (Katsiaficas, *The Imagination*, 33). The result of all this was that, by 1970, opinion polls among US students revealed that 41% of respondents viewed the war as “pure imperialism,” (Elbaum, *Revolution in the Air*, 43) with hundreds of thousands of Americans beginning to side with the North Vietnamese and Vietcong (Katsiaficas, *The Imagination*, 34). Moreover, as Elbaum relates, alienation over Vietnam prompted many activists to examine US foreign policy more generally, leading in their identification of a common theme of military interventions and CIA coups in the Third World, all to the benefit of US corporations and banks (Elbaum, *Revolution in the Air*. 43).

⁴⁸⁵ John Robert Greene, *America in the Sixties* (New York: Syracuse University Press, 2010), 129.

capitalist-driven imperialism⁴⁸⁶. This both provoked the same contempt and suspicion towards delegitimising conservative paradigm narratives as had riled the Marxist historians of previous decades⁴⁸⁷ and encouraged sympathy – even camaraderie – towards those engaged in IV against imperialism/capitalism, including violent Marxist-Nationalist insurgent movements in the ‘Third World’, with whom this cohort felt a great deal of affinity, perceiving their struggles as being one and the same, a joint ‘world revolution’⁴⁸⁸. As well as encouraging this sympathetic worldview towards these movements (including presumptions of their rationality and legitimacy), this sense of affinity also produced an ‘imagined community’ and shared universe of meaning, manifesting in what Prestholdt dubs a “transnational library” in which Western and Third World activists diffused and shared narratives, analyses, discourses, ideological texts, and vocabularies⁴⁸⁹. In this way, Marxist critiques of US imperialism – championed by Third World revolutionaries like Mao, Ho Chi Minh, Guevara, etc. – “became the entry-way to Marxism for thousands of young radicals⁴⁹⁰”.

This had longer-term consequences, as these Marxist theories – adopted by this cohort as students – would be institutionalised by them as academics in the following decades, affecting a leftist turn in the social sciences, away from the *status quo*-normative conservative sub-paradigms of the 1940s-50s⁴⁹¹. Less tangibly, the progressive paradigm conventional wisdoms cultivated over this period, which manifested as overt ant-establishment-normativity towards Third Worldist movements in the 60s and 70s, would persist in altered form into the GWOT years, with support for Islamist movements presumed to follow the same Marxist dynamics, only now the movements offering to deliver the people were

⁴⁸⁶ Elbaum, *Revolution in the Air*, 43.

⁴⁸⁷ Jacquelin van Stekelenburg & Bert Klandermans, “Social movement theory: Past, present and prospects,” in *Movers and Shakers: Social Movement in Africa*, eds. Stephen Ellis and Ineke van Kessel (Leiden: Brill, 2009), 23.

⁴⁸⁸ Christopher Kalter, “A shared space of imagination, communication, and action: perspectives on the history of the ‘Third World,’” in *The Third World in the Global 1960s*, eds. Samantha Christiansen and Zachary A. Scarlett (New York: Berghahn Books, 2013), 32; Jeremy Prestholdt, *Icons of Dissent: The global resonance of Che, Marley, Tupac and bin Laden* (London: Hurst & Company, 2018), 38; Fink, et al., “Introduction,” 17 & 26.

⁴⁸⁹ Prestholdt, *Icons of Dissent*, 39. See also: Maud Anne Bracke, “1968,” in *The Oxford Handbook of the History of Communism*, ed. Stephen A. Smith (Oxford: Oxford University Press, 2014), 158 & 160.

⁴⁹⁰ Elbaum, *Revolution in the Air*, 43. In Deflem’s words, “almost overnight, Karl Marx became one of the founding fathers of sociology” (Mathieu Deflem, “The Structural Transformation of Sociology,” *Sociology* 50 (2013), 159).

⁴⁹¹ David Inglis, “What is Worth Defending in Sociology Today? Presentism, Historical Vision and the Uses of Sociology,” *Cultural Sociology* 8(1) (2014), 109; and Jack A. Goldstone, “Toward a fourth generation of revolutionary theory,” *Annual Review of Political Science* 4 (2001), 140.

no longer gallant Marxist revolutionaries but backward jihadists who, though abhorrent, could at least portray themselves to the aggrieved as preferable to their tyrannical autocrats⁴⁹². This, ironically, brought the academic iteration into alignment with the counterinsurgent iteration that it had initially rejected as a tool for imperialism⁴⁹³.

2.2.3.3. *Socio-scientific reification and refinement:*

While the academic popularisation of the progressive paradigm involved a substantial ideological impetus, its refinement over subsequent decades benefited from a rigorous academic process of empirical and theoretical evaluation, lacunae-identification, and problematisation. This process followed a fairly uniform pattern of Kuhnian scientific revolutions, whereby causal theories – upon becoming unsustainable or insufficient in light of new empirical evidence – suffer a loss of confidence, prompting a search for remedial theories⁴⁹⁴. Repeatedly, theories, variables, and mechanisms – derived from limited case-studies – were found insufficient when applied to further case-studies: either because not all cases of IV featured those variables or, conversely, in certain cases where the variables were present, IV failed to occur⁴⁹⁵. The most important discovery of this process was that, while macroscopic grievances are broadly ubiquitous across the world, episodes of IV are relatively rare and, in fact, misery alone more typically promotes apathy than revolt⁴⁹⁶. Scholars thus concluded macroscopic grievances to be *necessary* to give ideologies persuasive power

⁴⁹² See below.

⁴⁹³ This rejection of COIN had been explicit during the late 1960s. The reframing of the Vietnam War as an imperialist venture saw the student movement (and many scholars) assert mounting pressure on the many social-scientists involved in the COIN 'military-academic-nexus' to cut their ties with the establishment, accusing them of "sacrificing their intellectual integrity to a warmongering, imperialistic national security state" (Rohde, "Gray Matters," 99). More generally, the social sciences – and in particular COIN research and Modernisation Theory - were condemned as a tool for legitimising the *status quo*, prompting a search for a "epistemological revolution" towards "speaking truth to power" in the field. See: Ibid, 99-121; Ezekiel & Post, "Worlds in collision,," Solovey, "Project Camelot,," and Deflem, "The Structural Transformation of Sociology," 158-159.

⁴⁹⁴ Kuhn, *The Structure*.

⁴⁹⁵ This process has been well articulated in van Stekelenburg & Klandermans, "Social movement theory," and Goldstone, "Toward a fourth generation". We discuss the various theories proposed to resolve these lacunae in section 2.3.1.1.1. below.

⁴⁹⁶ Van Stekelenburg & Klandermans, "Social movement theory," 24-25; Goldstone, "Toward a fourth generation of revolutionary theory," 146; Rupert Brown and Sam Pehrson, *Group Processes: Dynamics within and between groups*, 3rd ed. (Hoboken, NJ: John Wiley & Sons, Inc., 2020 [1988]), 288; Noakes and Johnston, "Frames of Protest," 1; John D. McCarthy and Mayer N. Zald, "Resource Mobilization and Social Movements: A Partial Theory," *American Journal of Sociology* 82(6) (May, 1977), 1214.

and promote engagement in IV, but not *sufficient*, prompting a search for the mediating variables/mechanisms that could push aggrieved apathy into revolt⁴⁹⁷. It is noteworthy that this same observation prompted conservative paradigm RVE theorists to write-off macroscopic grievances as causally significant in promoting IV. That progressive paradigm scholars have not shared this conclusion highlights the degree of deductive overstep involved in formulating RVE's foundational assumptions.

2.2.3.4. *Influence of Area Studies:*

Finally, *Area Studies* specialists (academic and journalistic) – often though not necessarily influenced by the Marxist turn in the social-sciences – have generally taken as granted progressive paradigm explanations for observed episodes of IV due to apparently self-evident empirical correlations between IV and macroscopic grievances and/or communal tensions. Multiple case-studies have witnessed previously marginal ideologies enjoying unprecedented periods of popularisation in line with parallel increases in macroscopic injustices and/or tensions⁴⁹⁸. Perhaps on account of the often single-case focus of such *Area Studies* research, such empirical work has not tended to produce such sophisticated refinements as its theoretical counterparts outlined above – as the lack of comparative testing has reduced the degree of lacuna-identification. Nevertheless, like their theoretical counterparts, many works within this field have concluded that macroscopic grievances are not alone *sufficient* to promote IV and have thus postulated their own mediating variables/mechanisms⁴⁹⁹.

2.3. Progressive sub-paradigms – a descriptive overview:

I now turn to the various progressive sub-paradigms, which are broadly shared across iterations. These sub-paradigms are organised according to their relevance to each foundational assumption:

2.3.1. On the causation of IV:

⁴⁹⁷ See Section 2.3. for the main sub-paradigms to have come out of this search.

⁴⁹⁸ Many of which are recalled in the footnotes throughout Section 2.3., particularly under the *Exploitation sub-paradigm* (Section 2.3.1.1.).

⁴⁹⁹ *Ibid.*

The progressive paradigm forwards three broad sub-paradigms on IV causation. They generally co-exist harmoniously, explaining different IV ‘types’ (e.g., insurgencies vs. revolutions, etc.):

2.3.1.1. *Exploitation/mobilisation sub-paradigm:*

This sub-paradigm dominates ‘observer’ and much counterinsurgent iteration thinking on insurgencies and, to a lesser degree, ethno-sectarian conflicts, including most scholarship/commentary on my own Sunni-Lebanese episodes⁵⁰⁰.

It attributes IV to either of two dynamics: 1) cynical exploitation of aggrieved communities by opportunistic movements (*exploitation*)⁵⁰¹ or 2) mobilisation of aggrieved communities by sincere, usually organic movement cadres (*mobilisation*)⁵⁰². Whether one opts for *exploitation* or *mobilisation* logics generally depends on the scholar’s/commentator’s own positionality – whether the particular ideology/movement is considered noble/rational or ignoble/irrational⁵⁰³. Regardless, the causal logic remains essentially the same: IV occurs when ideological movements mobilise aggrieved communities for action against their oppressors, by providing them with *post facto rationalised* ideological narratives of blame that rationalises (accurately or erroneously) their lived experiences, justifies and necessitates remedial violence, outlines

⁵⁰⁰ See references below.

⁵⁰¹ This is particularly typical of explanations for non-domestic Islamist IV (see empirical examples below) as well as the ‘classical’ COIN doctrine discussed in Section 2.2. As noted, dominant establishment-normative progressive paradigm explanations of non-domestic IV tended to conceive of unsavoury movements ‘feeding’ upon misery and want.

⁵⁰² To illustrate this trend one need only contrast scholarship on Sunni Islamist IV in Lebanon (see footnotes 501-508 below) with that on coterminous secular protest movements in the country, for example: Daniel Meier, “Popular Mobilizations in Lebanon: From Anti-System to Sectarian Claims,” *Democracy and Security* 11(2) (2015): pp. 176-189; Maya Mikdashi, “Lebanon,” in *Dispatches from the Arab Spring: Understanding the New Middle East*, eds. Paul Amar and Vijay Prashad (Minneapolis: University of Minnesota Press, 2013); Marwan M. Kraidy, “Trashing the sectarian system? Lebanon’s ‘You Stink’ movement and the making of affective publics,” *Communication and the Public* 1(1) (2016): pp. 19-26; and Lena Herzog, “Nothing but a demonstration? The civil society movement during the garbage crisis in Beirut after July 2015,” *Heinrich Böll Stiftung Middle East* (16th February 2016). We also find it prominent in scholarship on historical social movements, a notable example being the rise of Shi’a political consciousness in Lebanon under the ideological tutelage of Imam Musa al-Sadr, see: Fouad Ajami, *The Vanished Imam: Musa al Sadr and the Shia of Lebanon* (Ithaca and London: Cornell University Press, 1986); Rula Jurdi Abisaab and Malek Abisaab, *The Shi’ites of Lebanon: Modernism, Communism, and Hizbullah’s Islamists* (New York: Syracuse University Press, 2014); and Rodger Shanahan, *The Shi’a of Lebanon: Clans, parties and clerics* (London: Tauris Academic Studies, 2005).

⁵⁰³ As above. As discussed in the previous chapter, Islamist ideologies/movements have typically been viewed by western scholars as ignoble and irrational, prompting an ‘exploitation’ logic, whereas secular, democratic ideologies/movements have been generally viewed as noble and rational, prompting a ‘mobilisation’ logic to prevail.

strategic/tactical repertoires for achieving that change, and articulates a vision of a better society to strive towards⁵⁰⁴.

The *exploitation* variant – which is broadly analogous with the ‘classical’ COIN logic outlined above - parallels the conservative paradigm in attributing IV to manipulative ideological movements preying upon the ‘vulnerable’. However, in contrast to the conservative paradigm, such ‘vulnerability’ is predicated on macroscopic, not microscopic, factors, with the ‘vulnerable’ being communities, not individuals.

Both variants cite as ‘vulnerabilities’ socioeconomic and socio-political grievances and/or communal tensions⁵⁰⁵. Movements offer vulnerable

⁵⁰⁴ Here the literature on Sunni Islamist violence in contemporary Lebanon is particularly instructive. Salafi-jihadist groups are described as having capitalised on the socioeconomic marginalisation of Lebanese Sunni neighbourhoods – alongside the existence of communal tensions between those communities and their Shi’a Muslim equivalents – to recruit fighters for waging jihad both within Lebanon and abroad. They do this by utilising an ideological narrative that attributes Sunni marginalisation to a Shi’a conspiracy against Islam coordinated by Iran and spearheaded by Hezbollah; justify violence against Lebanese Shi’a communities by framing it as a legitimate and divinely-ordained jihad; by demonstrating the viability of their tactical/strategic repertoire by feting their battlefield successes in Iraq and Syria; and by portraying the establishment of a Caliphate as a negation of all that is wrong with the existing status quo. For references, see the itemised descriptive analysis throughout this section, particularly footnotes 501-508.

⁵⁰⁵ Notably: relative-deprivation and/or communal horizontal-inequalities (Lefèvre, *The Roots*, 5; Bernard Rougier, *The Sunni Tragedy in the Middle East: Northern Lebanon from al-Qaeda to ISIS* (New Jersey: Princeton University Press, 2015), 24; Asfura-Heim, et al., *The Specter*, 9; Omayma Abdel-Latif, “Trends in Salafism,” in *Islamist Radicalisation: The Challenge for Euro-Mediterranean Relations*, eds. Michael Emerson, Kristina Kausch and Richard Youngs (Madrid: Centre for European Policy Studies & FRIDE, 2009), 82; Monica Marks, “Youth Politics and Tunisian Salafism: Understanding the Jihadi current,” *Mediterranean Politics* 18(1) (2013), 111; Rori Donaghy, “ISIL exploit poverty to expand recruitment,” *Middle East Eye*, dated September 24 2015. Accessed November 27 2015. Available at: <https://www.middleeasteye.net/news/isil-exploit-poverty-expand-recruitment>; Hilal Khashan, “Lebanon’s Islamist Stronghold,” *The Middle East Quarterly* 18(2) (2011): pp. 85-90); destitution (Donaghy, “ISIL exploit poverty,”; Khashan, “Lebanon’s Islamist Stronghold”); real or perceived threats from ethnic/sectarian outgroups (which ‘extremists’ typically exaggerate so as to exploit) (Simon Haddad, “Accounting for Lebanese Muslims’ perspectives on the Islamic state (ISIS): religious militancy, sectarianism and personal attributions,” *Defense & Security Analysis* 33(3) (2017), 252; Adham Saouli, “Lebanon’s Salafis: Opportunities and Constraints in a Divided Society,” in *Salafism After the Arab Awakening: Contending with People’s Power*, eds. Francesco Cavatorta and Fabio Merone (Oxford Scholarship Online, 2017), 57; Tine Gade, “Lebanon: Political leadership confronted by Salafist ideology,” *Fondation pour la Recherche Stratégique* (August 2017). Available at: <https://www.frstrategie.org/web/documents/programmes/observatoire-du-monde-arabo-musulman-et-du-sahel/publications/en/13.pdf>, 9; Mona Alami, “New jihadist generation in Lebanon,” *al-Monitor*, dated September 9 2014. Accessed January 8 2015. Available at: <https://www.al-monitor.com/pulse/originals/2014/09/lebanon-jihad-salafism-threat.html>; Asfura-Heim, et al., *The Specter*, 7; and Aurélie Daher, “In the Wake of the Islamic State Threat: Repercussions on Sunni-Shi’i Competition in Lebanon,” *Journal of Shi’a Islamic Studies* 8(2) (Spring 2015), 2010); lack of socioeconomic opportunities (Gade, “Lebanon,” 5; and Christopher S. Chivvis and Jeffrey Martini, *Libya after Qaddafi: Lessons and implications for the future* (Santa Monica, CA: RAND Corporation, 2014), 27); inadequate representation, leadership, protection and service provision by ‘mainstream’ authorities (Gade, “Lebanon,” 5; Asfura-Heim, et al., *The Specter*, 1; Khashan, “Lebanon’s Islamist Stronghold,”; L7 CVE Lab, “Drivers of Instability,” 3; Lefèvre, *The Roots*, 4 and 6; and Rougier, *The Sunni Tragedy*, vii); and real or perceived regime

communities such diverse services and incentives as: essential services and aid⁵⁰⁶; protection, leadership, and representation⁵⁰⁷; employment and advancement⁵⁰⁸; dignity (through active participation in one's own liberation)⁵⁰⁹; cathartic narratives rationalising one's circumstances⁵¹⁰; spiritual/moral sanction for revolt⁵¹¹; and blueprints for a better society to strive towards⁵¹². This differs drastically from conservative paradigm assertions that ideologies/movements provide individual psychological fulfilment, with violence collateral damage from troubled individuals' warped self-actualisation quests.

As noted, research within this sub-paradigm usually concludes macroscopic grievances to be *necessary* but *insufficient* for promoting IV. Thus, various mediating variables/mechanisms are proposed to understand when and how aggrieved apathy transitions to violent revolt:

2.3.1.1.1. Theoretical hypotheses:

- 1) *Resource mobilisation theory*: if aggrieved communities are to engage in sustained, organised IV, they require mobilisation and organisation by

repression/discrimination (Tine Gade, "Return to Tripoli: Battle over minds and meaning amongst religious leaders within the Islamist field in Tripoli (Lebanon)," *Norwegian Defence Research Establishment (FFI)* (Mar., 2009). Available at: <https://www.ffi.no/en/publications-archive/return-to-tripoli-battle-over-minds-and-meaning-amongst-religious-leaders-within-the-islamist-field-in-tripoli-lebanon>, 111; and Nir Rosen, *Aftermath: Following the bloodshed of America's Wars in the Muslim World* (New York: Nation Books, 2010), 204).

⁵⁰⁶ Gade, "Lebanon," 9; Lefèvre, *The Roots*, 4; Abdel-Latif, "Trends in Salafism," 82; Marks, "Youth Politics," 111; Stefano M. Torelli, et al., "Salafism in Tunisia: Challenges and Opportunities for Democratisation," *Middle East Policy* 19(4) (2012), 150; and Daveed Gartenstein-Ross, et al., *Raising the Stakes: Ansar al-Sharia in Tunisia shift to Jihad* (The Hague: International Centre for Counter-Terrorism, 2014), 3.

⁵⁰⁷ Haddad, "Accounting for," 252; Daher, "In the Wake," 210; Linda Khatib, "The Political and Security Fallout of the Battle in Aarsal," *Carnegie Endowment for International Peace*, dated August 16 2014. Accessed January 5 2015. Available at: <https://carnegie-mec.org/2014/08/16/political-and-security-fallout-of-battle-in-aarsal-pub-56408>; Lefèvre, *The Roots*, 4; Rosen, *Aftermath*, 43; Tine Gade, "Limiting violent spillover in civil wars: the paradoxes of Lebanese Sunni jihadism, 2011-2017," *Contemporary Arab Affairs* (2017), 12; Alison Pargeter, "Islamist Militant Groups in post-Qadhafi Libya," *CTC Sentinel* 6(2) (Feb., 2013), 4; Marks, "Youth Politics," 111.

⁵⁰⁸ Donaghy, "ISIL exploit poverty,"; and Lefèvre, *The Roots*, 4.

⁵⁰⁹ Lefèvre, "The Sociopolitical Undercurrent"; and Aaron Y. Zelin, "Standoff between the Tunisian Government and Ansar al-Sharia," *The Washington Institute for Near East Policy*, dated May 14 2013. Accessed November 2 2019. Available at: <https://www.washingtoninstitute.org/policy-analysis/view/standoff-between-the-tunisian-government-and-ansar-al-sharia>

⁵¹⁰ Gade, "Lebanon," 9; Itani and Grebowski, "Beyond Spillover," 3; Lefèvre, *The Roots*, 11; Zoltan Pall, *Lebanese Salafis between the Gulf and Europe: Development, Fractionalization and Transnational Networks of Salafism in Lebanon* (Amsterdam: Amsterdam University Press, 2013), 48; Rougier, *The Sunni Tragedy*, 125; and Aron Lund, "Syria's Salafi Insurgents: the rise of the Syrian Islamic Front," *Swedish Institute of International Affairs Occasional Paper* 17 (2013), 3.

⁵¹¹ Lefèvre, "The Sociopolitical Undercurrent,"; and Lund, "Syria's Salafi Insurgents," 3.

⁵¹² Haddad, "Accounting for," 246; and Robert G. Rabil, *Salafism in Lebanon: From Apoliticism to Transnational Jihadism* (Washington, DC: Georgetown University Press, 2014), 239.

movement leaders. This requires various kinds of resources and capital (moral, cultural, social, organisational, human, and material⁵¹³) from movement leaders, notably expertise in, and platforms for, reaching out to, encouraging, enthusing, and directing potential movement members/supporters. Absent such resources, the aggrieved are likely to languish in fatalistic apathy, concerned purely with survival rather than revolution⁵¹⁴.

- 2) *Political process/political opportunities theory*: the key variables facilitating or constraining IV are exogenous to the ideology/movement, instead residing in the structure, character, and actions of the establishment and/or broader socio-political milieu. For example, Meyer argues that IV is most likely when, on one hand, the political system is not so open that the aggrieved have less risky avenues for grievance-resolution and, on the other hand, not so closed that repression render participation futile/too costly (or movements are prevented from advertising themselves)⁵¹⁵. Additionally, regimes vary in their capacity to absorb systemic shocks which, in other circumstances, might promote IV, or in their abilities to co-opt, discredit, or defang popularising ideologies/movements⁵¹⁶. Thirdly, different national/political cultures constrain what ideological frames are likely to resonate with, or be considered reasonable, credible, and legitimate by, a population, meaning that ideologies/movements that popularise in one locale may be rejected in other locales, despite shared grievances⁵¹⁷.

⁵¹³ According to the 'fivefold typology' proffered in Bob Edwards and John D. McCarthy, "Resources and Social Mobilization," in *The Blackwell Companion to Social Movements*, eds. David A. Snow, Sarah A. Soule, and Hanspeter Kriesi (Hoboken, NJ: Blackwell Publishing Ltd., 2004), 117-128.

⁵¹⁴ Van Stekelenburg & Klandermans, "Social movement theory," 25; Edwards and McCarthy, "Resources and Social Mobilization,"; Bob Edwards and Patrick Gillham, "Resource mobilization theory," in *The Wiley-Blackwell Encyclopedia of Social and Political Movements*, eds. David A. Snow, Donatella della Porta, Bert Klandermans, and Doug McAdam (Oxford: Blackwell Publishing Ltd., 2013); McCarthy and Zald, "Resource Mobilization"; and Aldon D. Morris and Suzanne Staggenborg, "Leadership in Social Movements," in *The Blackwell Companion to Social Movements*, eds. David A. Snow, Sarah A. Soule, and Hanspeter, Kriesi (Hoboken, NJ: Blackwell Publishing Ltd., 2004).

⁵¹⁵ David S. Meyer, "Protest and political opportunities," *Annual Review of Sociology* 30(2004), 128.

⁵¹⁶ Van Stekelenburg & Klandermans, "Social movement theory," 26; Goldstone, "Toward a fourth generation," 139-146.

⁵¹⁷ Hanspeter Kriesi, "Political context and opportunity," in *The Blackwell Companion to Social Movements*, eds. David A. Snow, Sarah A. Soule, and Hanspeter Kriesi (Hoboken, NJ: Blackwell Publishing Ltd., 2004), 72. This is further discussed in Section 2.3.2. *Ideology-centric sub-paradigm*, below.

- 3) *Interest group conflict theory*: IV constitutes everyday ‘politics by other means’, occurring when “the normal struggle between interest groups is escalated - by both the intensity of the conflict and the magnitude of resources that interest groups bring to bear - to the point where normal political processes for conflict mediation and resolution fail, and the political system is violently split apart⁵¹⁸”.
- 4) *Social constructionist and framing approaches*: for grievances to provoke IV, they must be socially constructed as avoidable and deliberate injustices with clear victims and villains. Otherwise, they may be apathetically understood as inevitable facts of life. Likewise, movements must portray themselves as legitimate, positive forces for change while deflecting establishment attempts to discredit and demonise them⁵¹⁹.

2.3.1.1.2. Empirical hypotheses:

Theoretically simpler but narratively richer, empirical hypotheses generally perceive a three-way dialectic between ‘push’ (i.e., extant grievances delegitimising the establishment and pushing communities to seek out alternative leadership), ‘empowerment’ (whereby the acquisition of certain resources or operational freedoms empower particular movements to effectively and plausibly advertise themselves as alternative leaders), and ‘pull’ dynamics (whereby empowered movements offer themselves as plausible alternative leadership through material inducements and/or ideological appeals)⁵²⁰. Such explanations dominate analyses of non-domestic Islamist IV, attaining a degree of orthodoxy for understanding Islamist IV in Syria, Iraq, Tunisia, Libya, Afghanistan, and my own Sunni-Lebanese episodes, etc. For example, Syria’s post-2011 IV is generally attributed to violent regime repression of peaceful protestors ‘pushing’ Syrians into seeking out protection and alternative leadership. Cynical regime amnesties of imprisoned Islamists and international funding then ‘empowered’

⁵¹⁸ Jack A. Goldstone, “Review: Theories of Revolution: The Third Generation,” *World Politics* 32(3) (Apr., 1980), 429.

⁵¹⁹ Robert D. Benford and David A. Snow, “Framing Processes and Social Movements: An Overview and Assessment,” *Annual Review of Sociology* 26 (2000), pp. 611-639; Van Stekelenburg & Klandermans, “Social movement theory,” 17-19, 28-30; Goldstone, “Toward a fourth generation,” 154; Karl-Dieter Opp, *Theories of Political Protest and Social Movements: A multidisciplinary introduction, critique, and synthesis* (London: Routledge, 2009), 234 & 250; Morris and Staggenborg, “Leadership,” 183-184; Noakes and Johnston, “Frames of Protest,” 2.

⁵²⁰ See the following examples.

Islamist movements to best offer those services to the Syrian people (giving them an edge over the more 'organic' FSA). Islamist movements then 'pulled' Syrians into supporting them through material offers of protection, justice, provisions, employment, and deposition of the Assad regime, and through ideological appeals to a cathartic sectarian narrative of villainization, heroism and utopia⁵²¹. A variation on this theme characterises progressive paradigm scholarship on the popularisation of militant Salafism in post-revolutionary (2011) Tunisia: Here, an environment of pervasive grievances (residual from Ben Ali's repressions and fears that the new establishment might not be much better, coupled with frustration over a chaotic post-revolutionary transition, pervasive socioeconomic deprivation and marginalisation, inadequate or absent governmental service provision and law enforcement) 'pushed' many Tunisians into seeking out an alternative system for the country. The opening up of the previously repressive political environment then 'empowered' Salafist movements to reach out, for the first time unobstructed, to the population. Salafists then 'pulled' some Tunisians into supporting them by material appeals such as employment and welfare provision and ideological appeals of a utopian alternative system⁵²². Yet another

⁵²¹ Charles R. Lister, *The Syrian Jihad: al-Qaeda, the Islamic State and the evolution of an insurgency* (London: Hurst & Company, 2015); Yassin-Kassab and al-Shami, *Burning Country*, 121-128; Van Dam, *Destroying a Nation*, 99; Anne Marie Baylouny and Creighton A. Mullins, "Cash is King: Financial Sponsorship and Changing Priorities in the Syrian Civil War," *Studies in Conflict & Terrorism* (2017): pp. 1-21; Baczko, et al., *Civil*, 179-192; Zelin, "Causes for Pause"; Lund, "Syria's Salafi Insurgents"; Elizabeth O'Bagy, "Jihad in Syria," *Institute for the Study of War Middle East Security Report* 6 (Sep., 2012); International Crisis Group, "Tentative Jihad"; Ben Rich, "Radicalising Syria: how the rebels are becoming more Islamist," *The Conversation*, dated July 28 2013. Accessed October 7 2018. Available at: <https://theconversation.com/radicalising-syria-how-the-rebels-are-becoming-more-islamist-16309>; Mironiva, et al., "The motivations"; Khaled Yacoub Oweis and Heiko Wimmen, "Syria's Uneasy Bedfellows: Perpetuation of Conflict Serves Radicals, Prospect for Compromise Increases Moderation," *Stiftung Wissenschaft und Politik SWP Comments* 52 (Dec., 2016); Thomas Pierret, "Brothers in Alms: Salafi Financiers and the Syrian Insurgency," *Carnegie Endowment for International Peace*, dated May 18 2018. Accessed October 6 2018. Available at: <https://carnegieendowment.org/2018/05/18/brothers-in-alm-salafi-financiers-and-syrian-insurgency-pub-76390>; Sherifa Zuhur, "The Syrian Opposition: Salafi and Nationalist Jihadism and Populist Idealism," *Contemporary Review of the Middle East* 2(1&2) (2015): pp. 143–163.

⁵²² Marks, "Youth politics"; Fabio Merone, "Enduring class struggle in Tunisia: The fight for identity beyond political Islam," *British Journal of Middle Eastern Studies* 42(1) (2015): pp. 74-87; Haim Malka, "Tunisia: Confronting Extremism," in *Religious Radicalism after the Arab Uprisings*, ed. John B. Alterman (Lanham, Maryland: Rowman & Littlefield, 2015); Torelli, et al., "Salafism in Tunisia,,"; Fabio Meronea and Francesco Cavatorta, "Salafist movement and sheikh-ism in the Tunisian democratic transition," *Middle East Law and Governance* 5 (2013): pp. 1-23; Róisín Hinds, "Conflict analysis of Tunisia," GSDRC (Jan., 2014). Available at: http://www.gsdr.org/docs/open/gsdrc_conflanal_tunisia.pdf; International Crisis Group, "Tunisia: Violence and the Salafi Challenge," *ICG Middle East/North Africa Report* 137 (Feb. 2013); Georges Fahmi and Hamza Meddeb, "Market for Jihad: Radicalization in Tunisia," *Carnegie Endowment for International Peace* (Oct. 2015). Available at: https://carnegieendowment.org/files/CMEC_55_FahmiMeddeb_Tunisia_final_oct.pdf; Anne Wolf, "Tunisia: Signs of Domestic Radicalization Post-Revolution," *CTC Sentinel* 6(1) (Jan.,

variation is demonstrated by progressive paradigm scholarship on the Taliban's popularisation in Afghanistan, which is broadly attributed to a lack of security and service provision, frustration over government abuses, corruption and ineptitude, and anger over NATO collateral damage 'pushing' many Afghans to seek out alternative leadership. The Taliban were then 'empowered' by foreign funding and proceeded to 'pull' in support through material appeals of security, justice, service provision, and employment⁵²³.

2.3.1.2. *Spontaneity sub-paradigm:*

Observing that revolutions typically occur spontaneously, participants are seen to mobilise and act independently of organised leadership or ideological programmes, being motivated solely by desire to abolish the *status quo* while holding only vague ideas as to what should replace it⁵²⁴. This constitutes food for

2013): pp. 1-4; Georges Fahmi, "Why democracy couldn't prevent radicalisation in Tunisia," *Carnegie Endowment for International Peace*, dated October 22 2019. Accessed September 1 2020. Available at: <https://carnegieeurope.eu/strategieurope/80137>; Christine Petré, "Tunisian Salafism: the rise and fall of Ansar al-Sharia," *FRIDE Policy Briefs* 209 (Oct., 2015). Available at: https://www.files.ethz.ch/isn/194178/PB209_Tunisian_Salafism.pdf.

⁵²³ Anne Stenersen, *The Taliban insurgency in Afghanistan – organization, leadership and worldview* (Kjeller: Norwegian Defence Research Establishment, 2010), 22; Joseph J. Collins, *Understanding War in Afghanistan* (Washington, DC: National Defense University Press, 2011), 57 & 77; Gilles Dorransoro, "The Taliban's winning strategy in Afghanistan," *Carnegie Endowment for International Peace* (2009). Available at: https://carnegieendowment.org/files/taliban_winning_strategy.pdf, 5 & 12; Capt. Michael Erwin, "Key factors for the recent growth of the Afghan insurgency," *CTC Sentinel* 1(8) (Aug., 2008); Matt Waldman, "Dangerous Liaisons with the Afghan Taliban: The Feasibility and Risks of Negotiations," *United States Institute of Peace* 256 (Oct., 2010), 3-6; Roohullah Rahimi, "Afghanistan: Exploring the Dynamics of Sociopolitical Strife and the Persistence of the Insurgency," *A Pearson Peacekeeping Centre Occasional Paper* 2 (2008). Available at: https://reliefweb.int/sites/reliefweb.int/files/resources/D088149E41DD930449257645001ACC72-Full_Report.pdf, 4-5 & 16; Seth G. Jones, *RAND Counterinsurgency Study: Vol. 4 - Counterinsurgency in Afghanistan* (Santa Monica, CA: RAND Corporation, 2008), 41-42; Gilles Dorransoro, "Who Are the Taliban?" *Carnegie Endowment for International Peace*, dated October 22 2009. Accessed January 14 2020. Available at: <https://carnegieendowment.org/2009/10/22/who-are-taliban-pub-24029>; "David Miliband's speech on Afghanistan: Full text," *New Statesman*, dated July 27 2009. Accessed January 4 2020. Available at: <https://www.newstatesman.com/2009/07/afghanistan-taliban-pakistan>

⁵²⁴ This trend has been formalised in a recent study by Kamrava. Describing his 'spontaneous revolution' ideal-type, he writes: "these revolutions do not have an obvious endgame other than the collapse of the Old Order [...] the goals of the revolution are seldom clearly articulated [...] ideologies do not become clear until after the revolution's 'leaders' have emerged to take charge [...]. If initially there is an ideology that guides the uprising, it is a negation of the status quo." (Mehran Kamrava, *A Concise History of Revolution* (Cambridge: Cambridge University Press, 2020), 4, 6, and 68.) This popular view is widely shared, for example: Trotsky, *History of the Russian Revolution*, xvi; Neil Faulkner, *A People's History of the Russian Revolution* (London: Pluto Press, 2017), 28; Jack A. Goldstone, "Ideology, Cultural Frameworks, and the Process of Revolution," *Theory and Society* 20(4) (Aug., 1991): pp. 405-453; Sidney Tarrow, "Cycles of Collective Action: Between Moments of Madness and the Repertoire of Contention," *Social Science History* 17(2) (Summer, 1993), 285; Marx and Engels, *Revolution and Counter-revolution*, 4; and Ellis, "The Revolution," 29.

thought after discussing the conservative paradigm's assumption that *ideological persuasion* motivates IV. Revolutionary violence results from non-ideological factors – 'permissive' grievances catalysed by specific 'trigger' events (e.g., military reverses, economic crises, bad harvests, alienating government actions⁵²⁵ etc.) or exogenous factors (e.g., revolutions abroad which inspire apathetic populations by raising political consciousness and solidarity⁵²⁶ and/or demonstrating change is possible⁵²⁷). Only as revolutionaries ask: 'What next?' do ideologies/movements become causally significant, competing to assume leadership and steer the aftermath in accordance with their particular prognostic vision⁵²⁸. As the revolutionary movement schisms between these competing ideologies/movements, IV becomes possible as new adherents become invested in their chosen movement's vision for the new order, indoctrinated/socialised in its ideological tenets, polarised against its rivals, and paranoid of counterrevolutionary conspiracies or opportunist rival movement 'hijackings'⁵²⁹. The line of inquiry thus shifts to why certain ideologies/movements popularise over others, as I explore in section 2.3.2.

2.3.1.3. *Hegemony sub-paradigm:*

This sub-paradigm is explicitly anti-establishment-normative, taking as granted that the mobilising ideology accurately reflects the lived experiences of the aggrieved. Nevertheless, it can and has been applied by 'observer' scholars to explain the varying fortunes of different ideologies/movements⁵³⁰.

⁵²⁵ Goldstone, "Toward a fourth generation," 144-145; Goldstone, "Review: Theories of Revolution," 430; Noakes and Johnston, "Frames of Protest," 1.

⁵²⁶ Sarah A. Soule, "Diffusion Processes within and across Movements," in *The Blackwell Companion to Social Movements*, eds. David A. Snow, Sarah A. Soule, and Hanspeter Kriesi (Hoboken, NJ: Blackwell Publishing Ltd., 2004), 298; Cecelia Walsh-Russo, "Diffusion of Protest," *Sociology Compass* 8(1) (2014), 37; Donatella Della Porta, "Eventful protest, global conflicts," *Distinktion: Scandinavian Journal of Social Theory* 9(2) (2008), 30.

⁵²⁷ Usually by demonstrating the effectiveness of new strategies ("repertoires of contention") for deposing perceivably immovable regimes. See: Ruud Koopmans, "The dynamics of Protest Waves: West Germany, 1965 to 1989," *American Sociological Review* 58(5) (Oct., 1993), 641-642; Sidney G. Tarrow, *Power in Movement: Social Movements and Contentious Politics*, 3rd ed. (New York: Cambridge University Press, 2011 [1994]), 197-198; Tarrow, "Cycles," 284-286; Soule, "Diffusion Processes," 295-298; Doug McAdam and Dieter Rucht, "The Cross-National Diffusion of Movement Ideas," *The Annals of the American Academy of Political and Social Science* 528 (Jul., 1993), 58; Della Porta, "Eventful protest," 30.

⁵²⁸ Kamrava, *A Concise History of Revolution*, 6; Trotsky, *History*, xvi; Goldstone, "Ideology," 413.

⁵²⁹ Particularly illustrative here are the examples of the post-revolutionary French 'terror'; the inter-revolution period in 1917 Russia and following Russian civil war, the socialist vs. proto-fascist violence in post-Kaiser Germany, and the Islamist vs. secularist polarisations in post-'Arab Spring' Tunisia, Egypt, Libya, and Syria. I expand upon this more in the next section.

⁵³⁰ For example, some non-RVE scholars of Islamist IV have made explicit use of Gramsci to conceptualise the strategies, successes and failures of various Islamist movements. See for

It originated in the thought of Gramsci, a Marxist activist⁵³¹. In contrast to other progressive sub-paradigms, – and with a passing resemblance to the conservative paradigm – it attributes IV to *ideological persuasion*. However, in polar opposition to the *conservative* paradigm, their ideology does not distort reality (by conjuring grievances *ex nihilo*), but rather *restore* it by exposing the falsity of establishment ideology pretensions to justice. Therefore, *ideological persuasion* is *insufficient* absent the real injustices it highlights. Thus, *Hegemony Theory* [HT] sits firmly within the progressive paradigm. To understand this position, it helps to consider the lacunae prompting its formulation:

As I began to elucidate in Section 2.2.1., ‘professional revolutionaries’ had sought to understand why people often regarded seemingly rational ideologies with disinterest/hostility, while acquiescing to establishment ideologies contrary to their interests. They concluded – Marx and Engels embryonically⁵³², Gramsci and Lukács concertedly⁵³³ - that rulers secure consent/compliance through both coercion⁵³⁴ and *ideological persuasion*⁵³⁵. Specifically, rulers exploit their influence over churches, schools, the media, cultural institutions, etc.⁵³⁶, to “diffuse throughout society a conception of the world which obscures the nature and character of class domination⁵³⁷”; disguising “narrow and selfish [elite] interests” as “common sense⁵³⁸”: necessary, natural, and in everyone’s best interests⁵³⁹. Resultantly, people are unlikely to be conscious of injustices – let alone to resist them – unless that pacifying establishment ideology can be subverted, discredited, and superseded by an ant-establishment ideology that articulates their true circumstances⁵⁴⁰.

example: Butko, “Revelation or revolution”; Rupe Simms, “[Islam is our Politics]: A Gramscian analysis of the Muslim Brotherhood (1928-1953),” *Social Compass* 49(4) (2002): pp. 563-582; Hazem Kandil, “Islamizing Egypt? Testing the limits of Gramscian counterhegemonic strategies,” *Theory and Society* 40 (2011): pp. 37-62; and, more broadly, John Chalcraft, *Popular Politics in the making of the modern Middle East* (Cambridge: Cambridge University Press, 2016).

⁵³¹ Gramsci, *Selections*.

⁵³² Leopold, “Marxism,” 22.

⁵³³ Both Gramsci and Lukács, working in isolation of each other, sought to explain why attempted socialist revolutions in post-World War One Europe had failed, despite the success of such attempts in Russia. See: Woolcock, “Politics,” 200; and Chris Nineham, *Capitalism and Class Consciousness: The ideas of Georg Lukács* (London: Counterfire, 2010), 7-9.

⁵³⁴ i.e., police, laws, courts, prisons, etc.

⁵³⁵ Marx and Engels, 16 & 26; Leopold, “Marxism,” 28.

⁵³⁶ Bates, “Gramsci,” 352-353.

⁵³⁷ Woolcock, “Politics,” 205.

⁵³⁸ Butko, “Revelation,” 43.

⁵³⁹ Leopold, “Marxism,” 24; Nineham, *Capitalism*, 22.

⁵⁴⁰ Bates, “Gramsci,” 360; Butko, “Revelation,” 43.

What is particularly striking about HT – following my conservative paradigm discussion – is its perception of the difficulty of *ideological persuasion*. While the conservative paradigm, particularly RVE's *obediently violent* sub-paradigm, assumes that *ideological persuasion* merely requires 'radicalising' an individual's extant beliefs (e.g., nudging a Muslim from 'mainstream' Islam into 'radical' Islam), HT perceives a need to convince people of a worldview completely at odds with what they have been conditioned to view as 'common-sense'. This is even more difficult because rulers possess unmatched resources for reinforcing the establishment ideology (e.g., superior resources of dissemination⁵⁴¹, influence over cultural and educational institutions⁵⁴², continuous reproduction/protection of that ideology by the population itself, e.g., by parents, priests, journalists, celebrities, etc⁵⁴³.), meaning attempts to subvert it by decrying its deceits (while proclaiming their anti-establishment ideology's virtues) are likely to be futile – if not counterproductive - in the face of regime counter-propaganda⁵⁴⁴. Exogenous pre-requisite developments are required to render the establishment ideology vulnerable to subversion, and the people amenable to alternative ideologies.

Gramsci thus formulated his concept of *organic crises*: macro-level, socio-political events that reveal the establishment ideology's contradictions/frailties/injustices/unsustainability, etc⁵⁴⁵. Such crises can delegitimise the establishment ideology as the gulf between its claims and observable reality widen, rendering its rhetoric farcical⁵⁴⁶. This creates a window in which the people become open to alternative ideas and leadership⁵⁴⁷. However, organic crises alone are insufficient to promote popular rejection of, and resistance against, the establishment ideology. Also required are opposing

⁵⁴¹ Bates, "Gramsci," 363.

⁵⁴² Butko, "Revelation," 47

⁵⁴³ Kandil, "Islamizing Egypt?" 42.

⁵⁴⁴ Bates, "Gramsci," 365.

⁵⁴⁵ Bates, "Gramsci," 364; Robert Fatton, "Gramsci and the legitimization of the state: the case of the Senegalese passive revolution," in *Antonio Gramsci: Contemporary applications*, ed. James Martin (London: Routledge, 2002), 260. For example, economic crises might subvert a bourgeois establishment ideology by betraying the instability of capitalist socioeconomic systems and/or the oligarchic nature of the regime as it bails out complicit banks while the people foot the bill under austerity policies (Marco Briziarelli and Susana Martínez Guillem, *Reviving Gramsci: Crisis, Communication, and Change* (New York: Routledge, 2016), 6; Nineham, *Capitalism*, 15). Similarly, military failures may betray the relative backwardness of the established order vis-à-vis its international rivals (e.g., when an economically-illiberal, autocratic regime is defeated by an economically-liberal, constitutional one) (Bates, "Gramsci," 364).

⁵⁴⁶ Schwarzmantel, *The Routledge Guidebook*, 182; Briziarelli and Guillem, *Reviving Gramsci*, 6.

⁵⁴⁷ *Ibid.*

ideological movements to step into the resulting ideological vacuum⁵⁴⁸. These movements must educate the people as to the truth of their circumstances⁵⁴⁹, and fortify them against reactionary establishment ideology-rehabilitation efforts⁵⁵⁰. Ironically, Gramsci's proposed tactics resemble RVE's *ideology-discrediting interventions* (highlighting the inconsistencies and hypocrisies of the establishment ideology⁵⁵¹ and promoting a better, alternative order)⁵⁵². Failure to do this allows the establishment to recover and re-establish itself (as no alternative ideology presents itself), or else for new but equally unjust and deceitful ideologies to take its place (e.g., fascism in his own time)⁵⁵³.

Despite Gramsci's asserted need for organic crises to discredit the establishment ideology, several 'professional revolutionaries' – notably Lenin and Guevara – believed revolutionary activism could pre-empt this need (or expedite its arrival) through 'consciousness raising' activities. These methods – alongside others - are discussed in the next section:

2.3.2. On ideological-popularisation:

Despite nuanced appraisals of IV causation, these approaches draw upon the same ideological-popularisation sub-paradigms. As noted, they contrast with the conservative paradigm in seeking causation at the macroscopic level, typically following rational choice, rather than psychological, interpretive frameworks. Moreover, while the conservative paradigm assumes a binary between rational, non-ideological thinkers (establishment ideology supporters) and irrational, ideological thinkers (anti-establishment ideology supporters), the progressive paradigm perceives a complex, multifaceted ideological arena characterised by dialectical competition between rival ideologies/movements and establishment

⁵⁴⁸ Butko, "Revelation," 48.

⁵⁴⁹ Ibid, 51.

⁵⁵⁰ Typically, the ruling classes will attempt to do this by scapegoating opposition or minority groups for the crisis or appealing to nationalist or patriotic sentiments. See: Bates, "Gramsci," 364; Faulkner, *A People's History*, 71.

⁵⁵¹ Kandil, "Islamizing," 42.

⁵⁵² Butko, "Revelation," 50; Carroll and Ratner, "Social Movements," 8

⁵⁵³ This latter occurrence was Gramsci's explanation for the failure of the socialist movements in post-World War One Italy and Germany to compete with bourgeois fascism. See: Bates, "Gramsci," 364; Schwarzmantel, *The Routledge Guidebook*, 182; and Kandil, "Islamizing," 40. In less precise terms, this assertion also pervades Marx' and Engels' explanations for the failure of the 1848 revolutions. They argue that a proletarian organisation was necessary to protect the menu people from being duped into a new bourgeois hegemony following the fall of the French monarchy. See: Marx, *The Eighteenth Brumaire*; Marx and Engels, "Address of the Central Committee".

ideology defenders. This redirects research from identifying the mechanisms of *ideological persuasion* towards identifying the factors lending particular ideologies/movements an advantage over rival movements.

Trotsky articulated this dialectical dynamic throughout his writings on the *Russian Revolution* and subsequent civil war, discussing how the *Bolsheviks* struggled both to persuade the populace to oppose the establishment ideology (*Tsarism*) and to secure and maintain their support in the face of competition from non-Bolshevik socialist (*Mensheviks*, *Social Revolutionaries*, and the *Black and Green Armies*) and non-socialist anti-establishment movements (the bourgeois-nationalist *Kadets* and, later, the *White Army*)⁵⁵⁴. At the crux of these competitions stands the imperative of persuading the hedging masses that one's own movement constitutes the most legitimate, capable, honest, and well-intentioned representative of the people, and that one's ideology constitutes the most accurate depiction of reality, most just and effective blueprint for society, and the best strategy for attaining it⁵⁵⁵. As to how such ideological competitions are won, however, Trotsky's theory is less developed, merely peppering his narrative with isolated, empirical examples from the tussle between the Bolsheviks and their pre-revolutionary Tsarist and post-revolutionary bourgeois and non-Bolshevik socialist rivals⁵⁵⁶. Fortunately, later scholars have proposed various theories that can be slotted into Trotsky's dialectical proto-framework:

⁵⁵⁴ It is most thoroughly articulated in his work: Trotsky, *History of the Russian Revolution*. Also useful is his short article: Trotsky, "Hue and Cry". Accessible applications of Trotsky's theory are provided in the works of Marxist historian Neil Faulkner, particularly his works: Faulkner, *A People's History*; and Neil Faulkner, *A Radical History of the World* (London: Pluto Press, 2018).

⁵⁵⁵ This idea is developed through Trotsky, *A History of the Russian Revolution* and summarised in less detail in Trotsky, "Hue and Cry." See also: Lenin, *What is to be done?*; and Luxemburg, *The Mass Strike*. It is thus equally applicable to the study of ideological contests between Bolsheviks and Tsarists in early 20th century Russia, Communists and Capitalists throughout the Cold War, and Islamists and secularists in contemporary Tunisia, Egypt, Libya, and Syria, etc.

⁵⁵⁶ For example, we see class-consciousness (i.e., support for socialism) increases in the pre-*World War One* era as military defeat against Japan, brutal Tsarist repression and counterrevolution (against the *1905 Revolution*) and continuing socioeconomic issues leave the menu people increasingly convinced that the "existing social structure has become incapable of solving the urgent problems of development of the nation." (Trotsky, *History of the Russian Revolution*, 745) However, the declaration of war against Germany and Austria-Hungary sees popular opinion "swing to the right" (towards the status quo) as the ruling classes prevail upon latent patriotic sentiments (Ibid, 29). War-induced food-shortages then cause opinion to swing once more to the left (towards socialism/the revolutionaries) (Ibid, 30) leading to the February 1917 Revolution, and then further movement to the left as the masses view the new *Provisional Government* with suspicion and throw their support behind the perceivably more representative *Soviets* (Ibid, 142). However, opinion then swings sharply to the right once more as rumours spread that the Bolsheviks are agents of the German Kaiser (Ibid, 542) and further again as people grow frustrated with the post-revolutionary chaos (Ibid, 548). Despite these setbacks,

2.3.2.1. *Organic sub-paradigm:*

Ideological consciousness – even entire ideologies – can develop organically out of the experience of revolutionary activism. As noted, 19th century ‘professional revolutionaries’ originated this sub-paradigm in their simplistic ‘liberty vs. tyranny’ consciousness-raising activities. However, more recent scholarship has added greater sophistication to the approach; notably Goldstone in his discussion on “protest identities”⁵⁵⁷. Easily situated within Trotsky’s dialectic, protestors/militants develop an affinity towards whichever movement is perceived as taking the most effective and/or heroic leadership of the pre-ideological protest/revolutionary movement. This occurs both due to the growth of solidarity and identification resulting from shared participation in a common cause and because the movement 1) successfully manifests “the same qualities that are expected from the state, namely justice and effectiveness”; 2) justifies and validates grievances; 3) proves most effective in defending its members and in pursuing change; and 4) provides a sense of empowerment and efficacy. Members of the broader protest/resistance movement thus become willing to transfer their allegiance from the state to that specific movement/faction⁵⁵⁸. In the context of a dialectical competition between movements, the victor will be the one that most effectively demonstrates its willingness and ability to champion the protesters’ aspirations, protect them from regime repression, and provide essential services neglected by the state. In this way, it also sits well with the materialist-dialectical logic of ‘classical’ COIN doctrine.

Scholarship discussing the ‘Islamisation’ of the anti-Assad SAOM demonstrates another organic dynamic, whereby Islamisation – frequently assumed a top-down process by opportunist jihadist ‘hijackers’⁵⁵⁹ – is at least as much a bottom-up

Bolshevik support swells when they lead the defence of Petrograd against the counterrevolutionary coup of General Kornilov (Ibid, 709); and so the tussle rages on and on.

⁵⁵⁷ Goldstone, “Toward a fourth generation,” 154.

⁵⁵⁸ Ibid, 154.

⁵⁵⁹ This popular trope pervades both academic scholarship and journalistic commentary on both the Syrian uprising and the ‘Arab Spring’ uprisings more broadly, see: Hassan Hassan, “How the Muslim Brotherhood hijacked Syria’s Revolution,” *Foreign Policy*, dated March 13 2013. Accessed October 31 2019. Available at: <https://foreignpolicy.com/2013/03/13/how-the-muslim-brotherhood-hijacked-syrias-revolution/>; Abdullah Almousa, “How Jabhat al-Nusra hijacked the Syrian Revolution,” *Atlantic Council*, dated August 31 2017. Accessed October 31 2019. Available at: <https://www.atlanticcouncil.org/blogs/syriasource/how-jabhat-al-nusra-hijacked-the-syrian-revolution/>; Michel Kilo, “Syrian Opposition hijacked by Islamists, foreign influence,” *al-Monitor*, dated December 13 2012. Accessed October 31 2019. Available at: <https://www.al->

process, with [Sunni] Islamic – and from there Islamist - motifs and narratives being embraced organically as a means of creating a distinctively anti-Assad counter-culture. Such motifs represent 1) the most obvious aspects uniting members of the opposition and differentiating them from the Assad regime (their Sunni identity as the uprising polarised along sectarian lines); 2) statements of defiance (e.g., growing Salafi-style beards specifically because they had traditionally been treated with suspicion by the regime); and 3) symbolic linkages with external movements perceived to be fighting the same struggle (e.g., Lebanese Sunnis adopting jihadist iconography in solidarity with jihadists perceived as fighting the same sectarian enemy in Syria and Iraq)⁵⁶⁰. This bottom-up coalescence of the SAOM around their Sunni identity then facilitated efforts by Islamists movements to claim ownership of the movement, as they were able to “out-Sunni” the secular, non-sectarian FSA⁵⁶¹.

2.3.2.2. *Ideology-centric sub-paradigm:*

monitor.com/pulse/politics/2012/12/islamist-alternative-will-not-save-syria.html; Samia Nakhoul, “How al Qaeda hijacked the spirit of Syria’s Revolution,” *Business Insider*, dated March 11 2014. Accessed October 31 2019. Available at: <https://www.businessinsider.com/r-al-qaeda-hijacks-spirit-of-syria-revolt-three-years-on-2014-11?r=US&IR=T>; Michel Stors, “Al-Nusra militants hijack revolution,” *Arab News*, dated April 24 2013. Accessed October 31 2019. Available at: <https://www.arabnews.com/news/449185>; Emily Feldman, “How ISIS hijacked the Syrian Revolution,” *Mashable*, dated September 24 2014. Accessed October 31 2019. Available at: <https://mashable.com/2014/09/24/isis-hijacked-syrian-revolution/?europa=true>; Loubna Mrie, “How did the Syrian uprising become dominated by jihadists?” *The National*, dated January 12 2017. Accessed October 31 2019. Available at: <https://www.thenational.ae/opinion/how-did-the-syrian-uprising-become-dominated-by-jihadists-1.65996>; Aryn Baker, “To Syria’s Revolutionaries, Assad isn’t looking so bad after all,” *Time*, dated December 9 2013. Accessed October 31 2019. Available at: <http://world.time.com/2013/12/09/some-syrian-revolutionaries-choose-assad-over-islamist-rebels/>; John R. Bradley, *After the Arab Spring: How Islamists hijacked the Middle East Revolts* (London: Palgrave Macmillan, 2012); Lin Noueihed and Alex Warren, *The Battle for the Arab Spring: Revolution, Counter-Revolution and the making of a new era* (New Haven: Yale University Press, 2012); Bassam Tibi, *The Sharia State: Arab Spring and Democratization* (Oxon: Routledge, 2013), 156; Richard Spencer, “The disastrous triumph of the Arab Spring,” *The Daily Telegraph*, dated January 23 2015. Accessed October 31 2019. Available at: <https://www.telegraph.co.uk/news/worldnews/middleeast/11362651/The-disastrous-triumph-of-the-Arab-Spring.html>; James Phillips, “The Arab Spring descends into Islamist Winter: Implications for U.S. Policy,” *The Heritage Foundation*, dated December 20 2012. Accessed October 31 2019. Available at: <https://www.heritage.org/report/the-arab-spring-descends-islamist-winter-implications-us-policy>; James Hider, et al., “Christians live in fear of attack as extremists hijack the Arab Spring,” *The Times*, dated August 11 2012. Accessed October 31 2019. Available at: <https://www.thetimes.co.uk/article/christians-live-in-fear-of-attack-as-extremists-hijack-the-arab-spring-rzhn2c8rmwc>; and Maajid Nawaz, “Why Islamists beat Liberals in the Middle East,” *War on the Rocks*, dated August 27 2014. Accessed October 31 2019. Available at: <https://warontherocks.com/2014/08/what-the-middle-east-needs/>

⁵⁶⁰ Baczkowski, et al., *Civil War*, Lund, “Syria’s Salafi insurgents,”; O’Bagy, “Jihad in Syria,” 17; Al-mawla, “Salafis in Lebanon”.

⁵⁶¹ Lund, “Syrian Jihadism,” 13.

Most explicitly conceptualised in the ‘framing’ approach to *social movement theory*⁵⁶² the specific ideational content of a given ideology (i.e., the accessibility/appeal/relevance/empirical veracity of its frames) is central to determining its outcome in an ideological competition. Specifically, an ideology’s frames must ‘resonate’ with the target demographic; through either:

- Empirical resonance: do the ideology’s claims/narratives appear to accurately represent reality? Can it withstand ‘fact-checking’?⁵⁶³
- Experiential resonance: do the ideology’s claims/narratives appear to accurately reflect and explain the everyday experiences of the target audience? Is it relatable?⁵⁶⁴
- Centrality resonance: do the ideology’s claims/narratives speak to/seek to address the central concerns of the target audience?⁵⁶⁵
- Cultural resonance: are the ideology’s claims/narratives culturally accessible/familiar/acceptable to the target audience? Do they make cultural ‘common-sense’? Are they liable to affirm, offend, or baffle cultural sensibilities?⁵⁶⁶

‘Framing’ is considered an active, agentic pursuit. Rather than the ideology speaking for itself, ideological movements actively endeavour – through their discourses/propaganda - to articulate their ideology’s frames in a way that satisfies the above-listed criteria. Using the example of Sunni-Lebanese Islamists, discursive strategies may include 1) attempting to raise the salience of relevant identity facets over others among the target audience (e.g., raising the salience of the target audience’s Sunni Muslim identity over their identity as Lebanese, Beirutis, Arab, working class, etc. by portraying their grievances as

⁵⁶² The ‘framing’ approach is particularly well articulated in a review article by two of the approach’s key architects - Benford and Snow, “Framing Processes”.

⁵⁶³ Ibid, 620.

⁵⁶⁴ Ibid, 621.

⁵⁶⁵ Ibid.

⁵⁶⁶ Ann Swilder, “Culture in Action: Symbols and Strategies,” *American Sociological Review* 51(2) (1986), 273; Mayer N. Zald, “Culture, Ideology, and Strategic Framing,” in *Comparative perspectives on social movements: political opportunities, mobilising structures, and cultural framings*, eds. Doug McAdam, John D. McCarthy, and Mayer N. Zald (Cambridge: Cambridge University Press, 1996), 226; Wilson, *Introduction to Social Movements*, 96; Benford and Snow, “Framing Processes,” 624; Gary Alan Fine, *Tiny Publics: A Theory of Group Action and Culture* (New York: Russell Sage Foundation, 2012), 94; Marco Giugni, “Political Opportunities: From Tilly to Tilly,” *Swiss Political Science Review*, 15(2) (2009), 364; Goldstone, “Ideology,” 435; Kirk Hallahan, “Seven Models of Framing: Implications for public relations,” *Journal of Public Relations Research* 11(3) (1999), 207; Kriesi, “Political context,” 72; Van Dijk, *Ideology*, 74.

distinctly Sunni, resulting from targeted oppression of them as Sunnis; 2) aligning their frames with dominant cultural norms (e.g., claiming they constitute a return to the pristine Islam that the community has always striven towards); 3) aligning their frames with certain shared experiences (e.g., citing commonly-experienced apparent *Lebanese Armed Forces* [LAF] double standards towards Sunni and Shi'a communities as alleged proof of the ideology's sectarian narrative), etc⁵⁶⁷. Simultaneously they must rebuff 'counter-framing' efforts by establishment ideology defenders and/or rival movements seeking, by similar means, to discredit (or degrade the various forms of resonance of) their ideology⁵⁶⁸.

2.3.2.3. *Movement-centric sub-paradigm:*

The capabilities and behaviour of the movement is central to ideological competition outcomes. Otherwise stated, a less-ideationally resonant movement might outcompete a more resonant one if the championing movement is:

- 1) Better organised and resourced than its competitors: It is proposed that more organised movement are capable of marshalling resources and activists with greater speed and effectiveness than less organised rivals, and typically have more coherent and polished manifestos and the contacts and channels with which to disseminate them⁵⁶⁹.

⁵⁶⁷ These theoretical aspects are outlined in Van Stekelenburg and Klandermans, "Social movement theory," 32; Morris and Suzanne Staggenborg, "Leadership," 183-184. Empirical examples drawn from my own research, see Chapters 5-7.

⁵⁶⁸ Benford and Snow, "Framing Processes," 626.

⁵⁶⁹ For example, observing the ideological contests that followed upheavals such as the *English Civil War* and *French and Russian Revolutions*, Goldstone (Goldstone, "Ideology," 413) argues that small, well-organised movements are able to outcompete their more popular but loosely-organised rivals on account of their more developed organisational and disseminating structures. Similar conclusions have recently been drawn based on attempts to understand the electoral success of Islamist parties following the ostensibly secular 'Arab Spring' revolutions in Tunisia and Egypt (Tibi, *The Sharia State*, vii; Shadi Hamid, "Islamists and the Brotherhood: Political Islam and the Arab Spring," in *The Arab Awakening: America and the transformation of the Middle East*, ed. Kenneth M. Pollack (Washington, DC: Brookings Institution Press, 2011), 30; Fawaz A. Gerges, "The Islamist Moment: From Islamic State to Civil Islam?" *Political Science Quarterly* 128(3) (Fall, 2013): pp. 389-426; Eric Trager, "The unbreakable Muslim Brotherhood: Grim prospects for a liberal Egypt," *Foreign Affairs* 90(5) (2011); Christopher Alexander, "Tunisia: The best bet," in *The Islamists are coming: who they really are*, ed. Robin Wright (Washington, DC: Woodrow Wilson Center Press, 2012), 43; Max Guirguis, "Islamic Resurgence and Its Consequences in the Egyptian Experience," *Mediterranean Studies* 20(2) (2012), 208; Fait Muedini, "The Role of Religion in the 'Arab Spring': Comparing the Actions and Strategies of the Islamist Parties," *Scholarly Research Reviews*, Oxford Handbooks Online, 2014. Available at: <https://www.oxfordhandbooks.com/view/10.1093/oxfordhb/9780199935420.001.0001/oxfordhb-9780199935420-e-004>), and the success of Islamists groups in Syria who have gradually come to largely eclipse the initially-dominant secular FSA (Kodmani and Legrand, "Empowering the Democratic Resistance"; Lister, *The Syrian Jihad*, 3; O'Bagy, "Jihad in Syria," 9; Thomas Pierret, "Salafis at War in Syria: Logics of Fragmentation and Realignment," in *Salafism after the Arab Awakening: Contending with People's Power*, eds. Francesco Cavatorta and Fabio Merone

- 2) Led by individuals deemed more credible, heroic, legitimate, charismatic, etc., than its competitors: Leaders play important instrumental roles such as mobilising, organising and coordinating resources, and creating and recognising strategies and opportunities for action⁵⁷⁰; helping to motivate and maintain commitment to the ideology by the strength of their personalities, example and rhetoric⁵⁷¹; as well as maintaining the ideological cohesion of the movement and fending-off competition and/or subversion by rival movements or defenders of the *status quo*⁵⁷². Additionally, support for the leader(s) of an movement may actually precede and facilitate support for the ideology they champion⁵⁷³.
- 3) Able to plausibly portray themselves as most capable of delivering upon their stated objectives, defeating perceived oppressors, and resolving grievances, etc. This is particular true of movements who have demonstrated credible precedents for success, such as by delivering in a different locale. This argument has been used to explain numerous cases of ideological-popularisation, including: 1) Attempted 'copy-cat' Communist revolutions across much of Europe following the 1917 *Russian Revolution*⁵⁷⁴; 2) the popularisation of pan-Arab Nationalism following the anti-imperialist successes of Egypt President Nasser⁵⁷⁵; 3) The growth in

(Oxford: Oxford University Press, 2017), 138). For more general theoretical discussion, see also: Morris and Staggenborg, "Leadership," 175; Goldstone, "Ideology," 413; and Gary Alan Fine and Kent Sandstrom, "Ideology in Action: A Pragmatic Approach to a Contested Concept," *Sociological Theory* 11(1) (1993), 34.

⁵⁷⁰ Morris and Staggenborg, "Leadership," 173.

⁵⁷¹ Van Dijk, Ideology, 175; Wilson, Introduction to Social Movements, 125; and Benford and Snow, "Framing Processes," 621.

⁵⁷² Discussed at length in Lenin, *What is to be done?*; and Trotsky, *A History of the Russian Revolution*.

⁵⁷³ For example, Fine notes that many Nazis possessed only a rudimentary understanding of the actual ideology of Nazism, but were instead purely enamoured by the leadership and personality of Hitler (Fine, *Tiny Publics*, 96).

⁵⁷⁴ Eric Hobsbawm, *The Age of Extremes: A History of the World, 1914-1991* (New York: Vintage Books, 1994), 54-71; Archie Brown, *The rise and fall of Communism* (New York: HarperCollins Publishers, 2009), 78-82; Rob Sewell, *Germany: From Revolution to Counter Revolution*, 2nd ed. (London: Wellred, 2014) [Kindle], Chapter 1; William A. Pelz, *A People's History of the German Revolution* (London: Pluto Press, 2018), 48; and Asa Briggs and Patricia Clavin, *Modern Europe, 1789-Present*, 2nd ed. (London: Pearson Education Ltd., 2003), 216; 2.

⁵⁷⁵ Saleh Omar, "Arab Nationalism: A retrospective evaluation," *Arab Studies Quarterly* 14(4) (1992): pp. 23-37; Barry Rubin, "Pan-Arab Nationalism: The Ideological Dream as Compelling Force," *Journal of Contemporary History* 26(3/4) (Sep., 1991): pp. 535-551; Lahouari Addi, *Radical Arab Nationalism and Political Islam*, trans. Anthony Roberts, (Washington, DC: Georgetown University Press, 2017), 41; Martin Kramer, *Arab Awakening & Islamic Revival: The Politics of Ideas in the Middle East* (New Brunswick: Transaction Publishers, 2009), 32.

popularity of Islamism(s) following the 1979 *Iranian Revolution*⁵⁷⁶; and 4) The growth in popularity of jihadist movements following the military successes of JaN and IS in Syria and Iraq⁵⁷⁷.

2.3.2.4. *Relational sub-paradigm:*

Ideological competition outcomes are influenced as much by the nature, resources, and behaviour of one's opponents – or the broader socio-political milieu - as by one's own.

Firstly, the ideological orientation of the perceived oppressor/rejected establishment ideology is crucial as, to successfully appeal to the alienated, ideologies/movements must present themselves as the negation of that establishment ideology⁵⁷⁸; contradicting and defining themselves against it on principle. Therefore, "because revolutionary ideology arises within the context of a dialectic between the state and its opposition, the ideology of the state is an important clue to understanding the kind of ideology most likely to become the ideology of the opposition."⁵⁷⁹

Equally crucial is the behaviour of the perceived oppressor and/or rival movements:

⁵⁷⁶ Gilles Kepel, *Jihad: The trail of Political Islam*. 4th ed. (London: I.B. Tauris, 2009), 118; Henry Munson Jr., *Islam and Revolution in the Middle East* (Connecticut: Yale University Press, 1988), 90; Yvonne Haddad, "Islamists and the "Problem of Israel": The 1967 Awakening," *Middle East Journal* 46(2) (Spring, 1992), 270; Barry Rubin, *The Iranian Revolution and the Resurgence of Islam* (Broomall, PA: Mason Crest Publishers, 2007) [Kindle], Chapter 2; Rabil, *Salafism*, 9, 73-74; Rougier, *The Sunni Tragedy*, 11) and *mujahideen* insurgency against the Soviet Union in Afghanistan (Fawaz A. Gerges, *The Far Enemy: Why Jihad Went Global*, 2nd ed. (Cambridge: Cambridge University Press, 2009), 80; Jarrett M. Brachman, *Global Jihadism: Theory and Practice* (Oxon: Routledge, 2009), 3; Hassan Mneimneh, "The Islamization of Arab Culture," *Current Trends in Islamist Ideology* 6 (Spring 2008), 49; Eugene Rogan, *The Arabs: A History*, 2nd ed. (London: Penguin Books, 2012), 514; Camille Tawil, *Brothers in Arms: The story of al-Qa'ida and the Arab Jihadists* (London: Saqi, 2011) [Kindle], Chapters 1 and 2; Roel Meijer, "Salafism: Doctrine, Diversity and Practice," in *Political Islam: Context versus Ideology* (London: Saqi, 2012).

⁵⁷⁷ Baczko, et al, *Civil War*, 189; Lister, *The Syrian Jihad*, 4; Pierret, "Salafis at War," 141; Daher, "In the Wake of the Islamic State," 210; Ghassan Rifi, "Lebanon's online Salafists monitor Iraq events," *al-Monitor*, dated June 18 2014. Accessed November 9 2014. Available at: <https://www.al-monitor.com/pulse/security/2014/06/iraq-isis-developments-boost-lebanon-salafists.html>; Jennifer Cafarella, "Syrian Jihadists signal intent for Lebanon," *Institute for the Study of War* (2015), 4; Belen Fernandez, "The al-Qaedaification of Lebanon?" *Middle East Eye*, dated April 14 2014. Accessed November 9 2014. Available at: <https://www.middleeasteye.net/big-story/al-qaedification-lebanon>; and Alami, "The impact of the Syrian Conflict".

⁵⁷⁸ Moaddel conceptualises revolutions as a contest between "two mutually negating ideological universes —the state ideology and the ideology of the opposition." See: Mansoor Moaddel, "Ideology as Episodic Discourse: The Case of the Iranian Revolution," *American Sociological Review*, 57(3) (1992), 360.

⁵⁷⁹ Ibid, 375. Goldstone agrees, arguing that the egalitarian ideology of the French revolutionaries emerged as an 'anti-principle' to the aristocratic *ancien régime* (Goldstone, "Ideology," 421).

- 1) If the behaviour of one movement alienates its potential support base, the alienated will typically turn towards whatever alternative movements are on hand⁵⁸⁰. Alternatively, if one movement is seen to sell-out or lose conviction, rival movements will benefit on account of their perceived superior devotion and incorruptibility⁵⁸¹.
- 2) If the authorities tolerate one movement while repressing another, then the more tolerated movement will enjoy greater liberty to proselytes and lead, while potential supporters will be less inhibited in joining that movement as it carries fewer physical risks (incarceration, torture, death, etc.)⁵⁸².

2.3.3. On preventing/containing IV:

As I have begun to elucidate, the progressive paradigm views the conservative paradigm's ethos on ideology/movement-discrediting to be a tertiary, even futile, endeavour. Due to the causal primacy of grievances – and the multiple-movement ideological arena – discrediting ideologies/movements only creates vacuums into which rival ideology/movement can step. Therefore, the progressive paradigm prizes grievance resolution to negate the persuasive

⁵⁸⁰ This is evident in Trotsky's analysis of the *Russian Civil War*, whereby forceful Bolshevik grain seizures from destitute peasants encouraged support for the White and/or Green Armies (Trotsky, "Cry and Hue"). Some scholars cite evidence of similar dynamics in contemporary Syria, where corruption and warlordism among FSA factions promoted increased support for the more disciplined and less-corrupt Islamists (Zelin, "Causes for Pause," 25; Phillips, *The Battle for Syria*, 131; Khatib, et al., "Western Policy," 24; Yassin-Kassab and al-Shami, *Burning Country*, 122; and Mironova, et al., "Syria's Democracy Jihad").

⁵⁸¹ The chief case-study here is the contest between Pan-Arab Nationalism, Marxism and Islamism in the Arab World. Following the 1967 *Arab-Israeli war*, the Arab people began to lose faith in the sincerity of Arab Nationalist leaders, who seemed more concerned with entrenching their own power than actually delivering upon their promises. The result was that public opinion swung dramatically in favour of rival (and previously marginal) leftist and Islamist movements (John Myhill, "The Islamization of Arab Nationalism," *Critical Review* 22(1) (2010), pp. 19-43; Tareq Y. Ismael, *The Arab Left* (New York: Syracuse University Press, 1976), 106-120; Haddad, "Islamists"; Arthur Goldschmidt Jr., *A Concise History of the Middle East [Seventh (25th Anniversary) Edition]* (Colorado: Westview Press, 2002), 320; Tabitha Petran, *Struggle over Lebanon* (New York: Monthly Review Press, 1987), 96; and Marius Deeb, *The Lebanese Civil War* (New York: Praeger 1980), 63).

⁵⁸² This argument has been made regarding the growth of Sunni Islamist movements in Lebanon during the period of direct Syrian occupation between 1990 and 2005. On one hand, the Syrian regime actively fostered recruitment of Lebanese Sunnis in Salafi-jihadist groups as a strategy to redirect anti-Syrian sentiment into anti-Western sentiment by facilitating their entry into the anti-Coalition jihad in Iraq (Tine Gade, "Sunni Islamists in Tripoli and the Assad regime 1966-2014," *Syria Studies* 7(2) (2015), 51). Perhaps more significantly, the Syrian authorities granted non-violent Sunni Salafi movements a free hand to subvert 'mainstream' Sunni authority in the north of the country as a means of dividing and weakening the community. The result was that the movement was able to integrate itself in the Sunni-Lebanese community in a way completely unavailable to many other groups (Ibid, 50; and Gade, *Return to Tripoli*, 48).

appeal of ideologies/movements or, should that prove unfeasible, empowering preferable movements to marginalise unpalatable ones⁵⁸³:

2.3.3.1. 'Classical' COIN doctrine:

As discussed in Section 2.2., 'classical' COIN envisions a dialectical contest in which insurgent and counterinsurgent forces compete for the support of a 'hedging' population, chiefly through rational choice material appeals (e.g., providing security, services, economic stimulus, infrastructure building, etc.). Counterinsurgents are less concerned about resonating ideologically as they are about demonstrating to the populace that they can expect a greater material dividend by siding with them over the insurgents⁵⁸⁴. This materialist ethos marks a striking departure from conservative paradigm logics of IV perpetrators being irrational fanatics impervious to rational, material inducements.

'Classical' COIN often also urges reforms and concessions⁵⁸⁵, or increased representation and/or access to resources *within* the establishment ideology for marginalised communities in the case of communal conflicts⁵⁸⁶. A logic of controlled 'revolution from above' to prevent an uncontrollable revolution from below aims to render anti-establishment movements redundant by adopting key, acceptable aspects of their programmes⁵⁸⁷, in turn rendering acquiescence

⁵⁸³ See below.

⁵⁸⁴ See Section 2.2.2.

⁵⁸⁵ Long, *Doctrine of Eternal Recurrence*, 6; Clemis, "Crafting non-kinetic warfare," 164; Innes-Robbins, *Dirty Wars*, Location 3627.

⁵⁸⁶ Long, "Counter Insurgency," 549. This, implicitly or explicitly, builds upon the *Inclusion-Moderation hypothesis*, whereby integrating anti-establishment actors into the system incentivises their positive participation through empowerment and representation (Jillian Schwedler, *Faith in Moderation: Islamist Parties in Jordan and Yemen* (Cambridge: Cambridge University Press, 2008), 13-14).

⁵⁸⁷ The term "revolution from above" was reportedly coined by Spanish conservative thinker Joaquin Costa (1846-1911) (Stanley G. Payne, *The Franco Regime, 1936-1975* (Madison, Wis., and London: The University of Wisconsin Press, 1987), 10) and was adopted as official strategy by Spanish conservatives in the early 1900s – particularly Antonio Maura – who warned "It is a conviction of all of us that Spain has to go through a revolution; if we do not make it here, it will be made in the streets" and advised a revolution-from-above incorporating "reforms carried out by the Government radically, rapidly, brutally" (Sebastian Balfour, *The End of the Spanish Empire, 1898-1923* (Oxford: Oxford University Press, 1997), 188) as a means of nipping in the bud social discontent through incremental, highly-controlled reforms carried out by the state, to prevent a wild, uncontrollable and iconoclastic popular revolution carried out by the masses. Others employed such logic prior to the term's coining. Napoleon III co-opted political radicals by offering them jobs, then took on their slogans as his own – instituting very public but tightly controlled socialistic reforms and projects such as housing projects, mutual aid societies, and other ameliorative programs in order to pacify and even win the gratitude of workers (Billington, *Fire in the Minds*, 343). Similarly, its most famous advocate and practitioner – German Chancellor Otto von Bismarck (r. 1871-1890) - used to logic of 'revolution from above' to render irrelevant the burgeoning German socialist movement through a series of political and welfare reforms (universal manhood suffrage, insurance, retirement benefits, etc.), enacting selective but

to the *status quo* - over participation in a dangerous insurgency - an obvious rational choice for the 'hedging' majority.

Additionally, 'classical' COIN often incentivises disengagement, reconciliation, and reintegration of individual movement members. In contrast to the conservative paradigm's ethos on counter-*ideological persuasion* and cognitive-emotional 'de-radicalisation', 'classical' COIN favours non-ideological appeals; combining material inducements⁵⁸⁸ and *psychological operations* [psyops] that depict the insurgency as futile and combatants better off cutting their losses and conceding to the *status quo*⁵⁸⁹.

In some 'classical' COIN literature, this rational choice logic is taken in a coercive direction: counterinsurgents employing collective punishments and other coercive strategies to intimidate the insurgents and hedging populace into rationally concluding that they are better off conceding to the *status quo*, the cost of active or passive support for the insurgency being unbearably high. This was implemented in Vietnam, Kenya, Algeria, etc., as well as pre-'classical' COIN campaigns like Second World War era Axis anti-partisan campaigns and French and British interwar counterinsurgency in their Middle East Mandates⁵⁹⁰. While often adopted pragmatically when counterinsurgents lacked the resources required for 'winning hearts and minds'⁵⁹¹, these strategies received academic sanction by some US social scientists during the Vietnam war⁵⁹². However, particularly since Vietnam, these approaches have been almost unanimously condemned as morally repugnant, domestically unpalatable, and strategically counterproductive⁵⁹³.

2.3.3.2. *Stabilisation doctrine:*

significant aspects of its programme under his own auspices. British conservative Disraeli took a similar tack (Hobsbawm, *The Age of Capital*, 138; Billington, *Fire in the Minds*, 337). This logic is clearly discernible in 'classical' COIN doctrine, as the surrounding footnotes elucidate.

⁵⁸⁸ Mostly focused upon the most basic needs and comforts offered to any who 'come in from the cold' – safety, food, comfort, warmth, a chance to go home to their families, etc – or else employment, position, etc. See: Robin, *The Making of the Cold War Enemy*, 97-99.

⁵⁸⁹ Ibid, 44-46, 97.

⁵⁹⁰ For an exhaustive overview, see: Innes-Robbins, *Dirty Wars*.

⁵⁹¹ French, *The British Way*, 175.

⁵⁹² This approach was advocated by the RAND Corporation during the Vietnam War, where it became, in the words of Berger, "the 'intellectual prop' for direct intervention in South Vietnam by the Johnson administration after 1965." See: Berger, "Decolonisation," 441. See also: Long, "Counter Insurgency," 550; Robin, *The Making of the Cold War Enemy*, 194-195.

⁵⁹³ Long, "Counter Insurgency," 555.

'Stabilisation' is considered an upgrade on – and ostensibly less-partisan and more politically-comprehensive iteration of – 'classical' COIN, although its underlying logic – and many of its strategic imperatives - are essentially unchanged. Emerging in the 1990s/early 2000s upon reflection of peacekeeping/conflict resolution experiences in former-Yugoslavia⁵⁹⁴, 'stabilisation' is billed as a renovation of 'classical' COIN which had sought "merely [to] treat the symptom [of conflict]⁵⁹⁵"; focusing only on superficial grievance resolution (security and services) while neglecting deeper political issues.

Stabilisation adheres to the progressive paradigm in prioritising grievance resolution to render redundant ideologies/movements⁵⁹⁶, usually delineating short-term and long-term objectives. Short term interventions seek to promote disengagement from IV by restoring physical and socioeconomic security to the communities involved⁵⁹⁷, demonstrating the 'peace dividend' of disengagement (e.g., through offering greater political representation, access to - and stability for the utilisation of - resources, development aid and facilities, etc.)⁵⁹⁸ and by neutralising 'spoiling' actors who threaten those objectives⁵⁹⁹ (typically 'extremist' movements inimical to proposed peace arrangements, or specific 'extremist' cadres who are inimical to reason – the latter construct being imported across from the conservative paradigm, a problematic innovation discussed in Chapter

⁵⁹⁴ Stuart Griffin, "Iraq, Afghanistan and the future of British military doctrine: from counterinsurgency to Stabilization," *International Affairs* 87(2) (Mar., 2011), 321; Roberto Belloni & Francesco N. Moro, "Stability and Stability Operations: Definitions, Drivers, Approaches," *Ethnopolitics* 18(5) (2019), 446; John Karlsrud, "From Liberal Peacebuilding to Stabilization and Counterterrorism," *International Peacekeeping* 26(1) (2019), 10; John Karlsrud, "United Nations Stabilization Operations: Chapter Seven and a Half," *Ethnopolitics* 18(5) (2019), 496-497; Roger Mac Ginty, "Against Stabilization," *Stability* 1(1) (2012), 23. (Although some scholars discern 'stabilisation' being practiced as early 19th century fin-de-siècle - Karlsrud, "United Nations Stabilization," 496; Belloni & Moro, "Stability," 446).

⁵⁹⁵ Statement of the UK Stabilisation Unit (2014), quoted in Belloni & Moro, "Stability," 446.

⁵⁹⁶ Griffin, "Iraq, Afghanistan," 323; Hayder al-Khoei, et al., "After ISIS: How to win the peace in Iraq and Libya," *European Council on Foreign Relations* (Jan., 2017), 1; Anthony H. Cordesman, *After ISIS: Creating Strategic Stability in Iraq* (Washington, DC: Centre for Strategic and International Studies, 2017), 7.

⁵⁹⁷ Renad Mansour and Saad al-Douri, *Rebuilding the Iraqi State: Stabilisation, Governance, and Reconciliation* (Brussels: European Parliament's Committee on Foreign Affairs, 2018), 5-6; David Keen and Larry Attree, *Dilemmas of counter-terror, stabilisation and statebuilding: A discussion paper* (London: Saferworld, 2015), iii; Roberto Belloni & Irene Costantini, "From Liberal Statebuilding to Counterinsurgency and Stabilization: The International Intervention in Iraq," *Ethnopolitics* 18(5) (2019), 518; Collinson, et al., "States of fragility," 278; Jonas Parello-Plesner, "Post-ISIS Challenges for Stabilization: Iraq, Syria and the U.S. Approach," *Hudson Institute* (Aug., 2018), 3; al-Khoei, et al., "After ISIS," 1 and 4.

⁵⁹⁸ Gordon, "The United Kingdom's stabilisation," 371; Collinson, et al., "States of fragility," 279.

⁵⁹⁹ Keen and Attree, *Dilemmas*, iii; Belloni & Moro, "Stability," 451.

3). These short-term interventions – essentially ‘classical’ COIN strategies - are intended to buy time and stability necessary for achieving longer-term stabilisation goals aimed at remedying the systemic causes of conflict⁶⁰⁰; notably by addressing government corruption, power abuses, and marginalisation⁶⁰¹, and addressing distrusts and animosities produced by the conflict and its causes⁶⁰². Broadly speaking, these interventions aim at negating the motivation for engaging in IV by improving state-society relations and, in doing so, government legitimacy⁶⁰³. Particular emphasis is placed on administrative devolution (so that aggrieved communities feel they have more control over resources, policy, security, justice, etc.)⁶⁰⁴, and reconciliation to prevent the resumption of IV out of revenge or mutual paranoia⁶⁰⁵. Thus, stabilisation retains the logic that IV results from movement exploitation of real grievances and communal tensions. By addressing those grievances/tensions, motivation for IV – and ideological/movement appeal - will be negated.

2.3.3.3. *Empowering alternative anti-establishment movements:*

This intervention has a narrower application, limited to two unusual circumstances: 1) When restoring the socio-political *status quo* is undesirable (e.g., when this would require restoring a hostile or tyrannical regime) or 2) when restoration is impossible (e.g., following a successful revolution that has discredited/annihilated the former regime; following the collapse of an Empire; or following the withdrawal of foreign/colonial rule, etc.).

Under such circumstances, external actors may seek to shape the emerging order by empowering actors deemed preferable over others; typically those deemed ideologically ‘moderate’ as a means of ‘denying space’ to those deemed ‘extremist’⁶⁰⁶. Two notable applications of this strategy include Britain’s

⁶⁰⁰ Gordon, “The United Kingdom’s stabilisation,” 371.

⁶⁰¹ Belloni & Moro, “Stability,” 452; Belloni & Costantini, “From Liberal,” 521; Gordon, “The United Kingdom’s stabilisation,” 370; Cordesman, *After ISIS*, 7.

⁶⁰² Mansour and al-Douri, *Rebuilding the Iraqi State*, 7 and 13; Parelo-Plesner, “Post-ISIS,” 7 and 11; al-Khoei, et al., “After ISIS,” 4.

⁶⁰³ Belloni & Moro, “Stability,” 452; Belloni & Costantini, “From Liberal,” 521; Gordon, “The United Kingdom’s stabilisation,” 370; Cordesman, *After ISIS*, 7.

⁶⁰⁴ Mansour and al-Douri, *Rebuilding the Iraqi State*, 11.

⁶⁰⁵ *Ibid*, 7 and 13; Parelo-Plesner, “Post-ISIS Challenges,” 7 and 11; al-Khoei, et al., “After ISIS,” 4.

⁶⁰⁶ As with the conservative paradigm, the usage of ‘extremist’ here can refer to either 1) an movement who’s ideological agenda is deemed unacceptably extreme in the eyes of key stakeholders, or 2) an movement whose cadres are deemed to be irrational and perpetually hostile ‘extremists’.

empowering of indigenous Anglophile, western-educated, middleclass technocrats in the closing days of colonialism (to deny space to ‘extremist’, Anglophobic anti-colonial and/or communist movements hostile to Britain)⁶⁰⁷ and debates over empowering ‘moderate’ SAOM factions to marginalise ‘extremist’ ones, particularly IS⁶⁰⁸.

This strategy lacks firm academic conceptualisation; scholars likely made skittish by the stigma of seeming to legitimise controversial ‘proxy warfare’ operations. However, advocacy policymakers display clear progressive paradigm logic: As discussed in chapter 3, in 2012, policymakers from the US DoD and CIA – notably Hillary Clinton, CIA Director Petraeus, and former US Ambassador to Syria Ford – proposed arming Syrian ‘moderates’ as a means of out-competing the better organised, resourced and militarily-proficient ‘extremist’ SAOM factions⁶⁰⁹. Clinton and Ford later explicated their logic. Clinton declared that: “The failure to help build up a credible fighting force of the people who were the originators of the protests [...] left a big vacuum, which the jihadists have now filled.⁶¹⁰” Ford similarly asserted that “cash for small salaries, together with reliable supplies of food, medicine and ammunition, would also put the moderate armed forces on an equal footing with the [al-]Qaeda groups that have long offered these enticements to recruit Syrian fighters⁶¹¹”. Their sentiments have been corroborated by many retrospective analyses on the SAOM’s ‘Islamisation’, which argues that the West’s failure to robustly empower the FSA directly

⁶⁰⁷ The logic being, according to a 1946 Colonial Office statement, to implement “a vigorous policy of African local government” that would prevent “the masses” following “the leadership of demagogues” – quoted in: White, *Decolonisation*, 16. See also: Hyam, *Britain’s Declining Empire*, 96 & 162.

⁶⁰⁸ Discussed in detail in Chapter 3.

⁶⁰⁹ Phillips, *The Battle for Syria*, 143; Charles Glass, “‘Tell me how this ends’: America’s muddled involvement with Syria,” *Harper’s Magazine*, archived from the February 2019 Issue. Accessed November 9 2019. Available at: <https://harpers.org/archive/2019/02/american-involvement-in-syria/>; Fabrice Balanche, “The End of the CIA Program in Syria,” *Foreign Affairs*, dated August 2 2017. Accessed November 9 2019. Available at: <https://www.foreignaffairs.com/articles/syria/2017-08-02/end-cia-program-syria>. It is reported that the UK Chief of Defence Staff made a similar proposal that same year (Geraint Alun Hughes, “Syria and the perils of proxy warfare,” *Small Wars & Insurgencies* 25(3) (2014), 522), and that several FSA factions pleaded the same case to US officials (Ibid, 528).

⁶¹⁰ Jeffrey Goldberg, “Hillary Clinton: ‘Failure’ to Help Syrian Rebels Led to the Rise of ISIS,” *The Atlantic*, dated August 10 2014. Accessed October 24 2019. Available at: https://www.theatlantic.com/international/archive/2014/08/hillary-clinton-failure-to-help-syrian-rebels-led-to-the-rise-of-isis/375832/?single_page=true

⁶¹¹ Robert Ford, “Arm Syria’s Opposition,” *The New York Times*, dated June 10 2014. Accessed October 24 2019. Available at: <https://www.nytimes.com/2014/06/11/opinion/ford-arm-syrias-opposition.html?module=inline>

facilitated the more organisationally, administratively- and militarily-proficient 'extremist' factions' hegemony over the SAOM⁶¹².

The strategy therefore sits well with the above-outlined sub-paradigms on ideological-popularisation – especially those movement-centric ones - in its assumption that materially-empowering certain movements will negate the appeal of rival movements who might otherwise find support on account of their superior organisational, administrative, and military prowess. Additionally, empowering 'moderate' movements to provide credible, trusted security, administration, justice, and other essential services to the populations under their control⁶¹³ is logically congruent with Stabilisation doctrine, whereby 'moderate' movements stabilise by 'proxy'.

2.4. Evaluating the progressive paradigm:

We now turn to evaluating the progressive paradigm, once again along methodological, conceptual, empirical, and political/ grounds. Prior to this, however, it is helpful to summarise its strengths:

Firstly, its acknowledgement of grievances endears it to critics of the conservative paradigm's inherent establishment ideology-normativity, delegitimisation of dissent, and ideologically-loaded concepts and terminology. Its lack of overt ideological baggage projects a more honest, academic, morally responsible, and un-politicised approach.

Secondly, its lack of doctrinaire, presumptive vocabulary creates a more open intellectual system, making it less likely that researchers will be corralled – consciously or subconsciously – toward certain conclusions by their guide constructs.

Thirdly, its macroscopic, often historical ethos guards against the kind of variable-blindness produced by the conservative paradigm's microscopic, ahistorical approach. Moreover, by avoiding this variable-blindness, progressive

⁶¹² Baylouny & Mullins, "Cash is King"; Kodmani and Legrand, "Empowering the Democratic Resistance"; Zelin, "Causes for Pause," 25; Lister, *The Syrian Jihad*, 8; Khatib, et al., "Western Policy," 9; Van Dam, *Destroying a Nation*, 104.

⁶¹³ House of Commons Defence Committee (UK), "UK military operations in Syria and Iraq: Government Response to the Committee's Second Report," *Seventh Special Report of Session 2016–17*, 55; UK FCO, "Official Statistics," "Joint Statement from the Global Coalition to Defeat ISIS," *Wilson Center*, dated February 13 2018. Accessed September 17 2019. Available at: <https://www.wilsoncenter.org/article/joint-statement-the-global-coalition-to-defeat-isis>; Mission statement of the Global Coalition against Daesh. Undated. Accessed September 17 2019. Available at: <https://theglobalcoalition.org/en/mission/#stabilising-liberated-areas>.

paradigm research engages in far more thorough and scientific processes of empirical testing, lacuna identification, and refinement.

Fourthly, the progressive paradigm's macroscopic approach to empirical research circumvents the endemic data acquisition and interpretation issues identified in conservative paradigm microscopic, motivational research.

Finally, while not immune to ideological biases (see below), progressive paradigm research has generally informed a higher degree of research-driven policymaking, in contrast to the conservative paradigm's endemic policy-driven research problem.

Despite these qualities, the progressive paradigm suffers from its own issues and limitations:

2.4.1. Methodological problematisation:

Section 2.2's GA flagged numerous methodological issues in the way the progressive paradigm arrived at its foundational assumptions:

2.4.1.1. *Ideological foundations of 'insurgent' and 'observer' iterations:*

Like the conservative paradigm, the progressive paradigm's *insurgent* iteration has profoundly ideological foundations. In originating as an explicitly anti-conservative counter-paradigm, it opposed the conservative paradigm's foundational assumptions on principle; seeking to legitimise what the latter had delegitimised and ennoble what it had demonised. Its architects took as granted the rationality of (their) IV/ideology the same way the conservative paradigm took as granted its *irrationality*. Similarly, while the conservative paradigm took as granted manipulative *ideological persuasion* as motivating IV, the progressive paradigm denied it on principle, for the truth could not be manipulative. Moreover, as movement cadres themselves, progressive paradigm founders took as granted that the conservative paradigm served a cynical, dishonest agenda, and dismissed its claims out of hand. This encouraged important omissions in the progressive research agenda – particularly the neglect of affective research for fear of legitimising conservative paradigm claims of IV not being entirely rational⁶¹⁴. These assumptions and parameters - overtly ideological in the works

⁶¹⁴ Van Stekelenburg and Klandermans, "Social movement theory," 33.

of *insurgent* 'professional revolutionaries' - migrated covertly into the foundational assumptions of the *observer* iteration, resulting in a continued neglect of affective dynamics.

Later iterations present other ideological assumptions. Like conservative paradigm thinking, relatively 'disinterested' *observer* progressive paradigm thinkers often arbitrarily distinguish between movements they like (usually secular, liberal, democratic ones) and those they don't (typically non-liberal democratic and/or religious ones) - the former interpreted under the 'mobilisation' sub-paradigm, the latter under the 'exploitation' sub-paradigm⁶¹⁵. Moreover, as I discuss in chapter 3, the exploitation sub-paradigm creates further issues by arbitrarily dichotomising movement members between an 'exploited' and misled mass of rational, materially-motivated 'hedgers' (who, true to the progressive paradigm, only find ideologies persuasive under macroscopic crisis conditions) and a core of exploitative, irrational, ideologically-motivated fanatics (who, much like the conservative paradigm, are sweepingly assumed to always find ideologies persuasive due to their personal psychological frailties). This is a highly subjective and ideological assumption: while a condescending concession is granted to those 'hedgers' who apparently consider the 'abhorrent' and 'irrational' ideology only out of desperation, those who support 'abhorrent' and 'irrational' ideologies prior to the onset of crisis conditions must be abhorrent and irrational themselves.

2.4.1.2. *Ideological foundations of 'counterinsurgent' iteration:*

While less obviously ideological than the domestic establishment ideology-normativity of the conservative paradigm, the progressive paradigm's *counterinsurgent* iteration takes as granted the ideological assumption that all will be well if non-domestic populations can enjoy the same utopia enjoyed in the West. This has traditionally seemed unproblematic, given our tendency to divide the world between self-evidently 'free' liberal democracies and tyrannical autocracies. However, closer readings of history – and mere glances at the present – reveal liberal democracies are far from utopian, far from immune to macroscopic grievances, and in fact appear to be unravelling under

⁶¹⁵ Nowhere has this been clearer than in the 'Islamist turn' in the Syrian uprising, where the popular progressive narrative envisions an organic secular democratic resistance movement being "hijacked" by an exploitative, non-organic cabal of jihadists, as discussed above.

socioeconomic and cultural malaise. We should therefore think twice before attributing ideological-popularisation to desperation among those denied Western liberal democracy. The Wests' malaise – and the ills of Western-led globalisation – may render alternative ideologies rational (if potentially misguided) first choices.

Additionally, this ideological stance encourages even greater arbitrary distinctions between 'good' and 'bad' IV, owing in particular to the influence of MT which, in positing a teleological end goal for all societies exemplified by US-style modernity, judges the legitimacy and even rationality of ideologies based on their alignment with that objective. Differently-oriented ideologies are thus not only different, but an aberration diverted from the path of progress. Even omitting MT, the assumption that ideologies/movements are only appealing to 'normal' people under crisis conditions leads us to assume that those who support them during non-crisis conditions must, by definition, be abnormal deviants. Likewise, the *counterinsurgent* iteration encourages an arbitrary dichotomisation between domestic and non-domestic IV in that, by attributing non-domestic IV to the absence of the establishment ideology, we are at a loss to explain domestic IV, prompting an arbitrary shift to microscopic (and thus illegitimate) causation. Thus, adherence to the progressive paradigm's *counterinsurgent* iteration regarding non-domestic IV often goes hand-in-hand with adherence to the conservative paradigm when domestic IV is concerned; with all the attendant contradictions (or, at the very least, arbitrary and unscientific distinctions) that go with it.

2.4.1.3. *Informed by a broad array of IV 'imaginaries' for which we lack operationalised distinctions or ideal types:*

Like the conservative paradigm, progressive sub-paradigms draw upon myriad contextually-bounded 'IV imaginaries', both in terms of different case-studies (from the French Revolution to 1960s US race riots, Third World communist guerrillas to Middle Eastern jihadists, etc.); different types of IV (revolutions, riots, insurgencies, civil-wars – as well as non-violent forms of ideological mobilisation - etc.); and different ideologies/movements (left wing and right wing, Jacobins to Bolsheviks, Third Worldists to Islamists, etc.). Scholars then understandably struggle to discern the degree to which middle-range theories/sub-paradigms can be generalised. This becomes even more complex with arbitrary distinctions between perceived cases of 'exploitation' vs. 'mobilisation', etc. Thus, we may inadvertently apply theories/sub-paradigms to case studies in which key

dynamics (e.g., specific socio-political/socioeconomic structures and circumstances, etc.) render them inappropriate, or where these dynamics are consequentially altered by novel variables, resulting in misleading analyses informing counterproductive policies.

2.4.1.4. *Crude, problematic empirical basis for 'classical' COIN doctrine:*

'Classical' COIN doctrine is informed by a crude empirical approach based on extrapolating 'best practices' from past COIN campaigns. Such analogous reasoning is doubly problematic:

Firstly, inferences are drawn from a very small-N case-selection – each subject to unique political settings, causes and dynamics – and applied uncritically to cases with different settings, causes, and dynamics⁶¹⁶. This results from an ahistorical analytical ethos, characterised by blanket, depoliticised, and essentialised characterisations of cases as 'insurgencies' – with shared causes, dynamics, and solutions - with scant recognition of their different political-historical-cultural-developmental trajectories and dynamics, and varying institutional, grievance and affiliation structures⁶¹⁷.

Secondly, key analogised case-studies have been conceptualised inaccurately. The flagship British COIN campaign in Malaya is typically remembered for its emphasis on "winning hearts and minds", while forgetting crucial coercive and politically-unsavoury interventions such as forced population resettlement and, perhaps more critically, the fact that the British ultimately conceded to the main insurgent demand for independence⁶¹⁸, if delivering it in different clothing.

⁶¹⁶ 'Classical' COIN doctrine has been largely built on a finite set of COIN case-studies (Malaya, 1948-1960; Indo-China, 1946-1954; Algeria, 1954-1962; Kenya, 1942-1960; Vietnam, 1955-1973; N. Ireland, 1968-1998) and, in many cases, simply Malaya. See: Celeste Ward Gventer, "Keep the change: Counterinsurgency, Iraq, and historical understanding," *Small Wars & Insurgencies* 25(1) (2014), 245; Celeste Ward Gventer, et al., "Minting New COIN: Critiquing Counter-insurgency Theory," in *The New Counter-insurgency Era in Critical Perspective*, eds. Celeste Ward Gventer, Robert S. Strauss, David Martin Jones, and M.L.R. Smith (Basingstoke: Palgrave Macmillan, 2014), 215; Rich, "A historical overview," 24.

⁶¹⁷ As Gventer asserts, 'classical' COIN assumes "there are distinct 'types' of war that are repeated, and one can divine universal prescriptions based on this typology" (Gventer, et al., "Minting New COIN," 13). This is problematic because it encourages us to understand insurgencies as discrete phenomena rather than as one of many possible manifestations of many possible causes. We thus treat the symptom, not the condition. As Rich notes, such a methodology is considered unacceptable among most historians and social scientists (Rich, "A historical overview," 7).

⁶¹⁸ Gventer, et al., "Minting New COIN," 15-16; Gian Gentile, "The conceit of American counter-insurgency," in *The New Counter-insurgency Era in Critical Perspective*, eds. Celeste Ward

2.4.1.5. *Lack of mechanisms for measuring the effectiveness of mitigating repertoires:*

Like conservative paradigm interventions, progressive mitigating repertoires suffer from a lack of mechanisms or benchmarks for measuring their effectiveness⁶¹⁹. The open, complex, multifaced IV arena means that, even when interventions appear to have been successful, it remains unclear to what extent the interventions were responsible, vis-à-vis the manifold other interacting dynamics, or to what extent they would be effective in other settings. This inhibits efforts to hone and refine the art and, for some, to substantiate the causal logic upon which it has been developed⁶²⁰.

2.4.1.6. *Macroscopic ethos constrains research into macroscopic causal variables and mechanisms:*

Having castigated the conservative paradigm on grounds that its microscopic focus blinds research to macroscopic variables, I must note the opposite to be true of progressive paradigm research. While the omission of affective/psychological variables/mechanisms is partly ideological in origin, it is also a natural product of the macroscopic research approach.

2.4.2. Conceptual problematisation:

These methodological woes are compounded by numerous conceptual problems:

2.4.2.1. *Lack of explicit, consistent, and consensual definitions and operationalisation of key terms and concepts:*

While conservative paradigm research – particularly under RVE – is shaped, constrained, and simultaneously confused by its problematic non-scholarly and under-operationalised conceptual nomenclature, the progressive paradigm lacks unifying nomenclature in its entirety. This both prevents the systematic integration

Gventer, Robert S. Strauss, David Martin Jones, and M.L.R. Smith (Basingstoke: Palgrave Macmillan, 2014), 244-245.

⁶¹⁹ Belloni & Costantini, "From Liberal Statebuilding," 521; Gordon, "The United Kingdom's stabilisation," 384.

⁶²⁰ Ibid.

of research (see below) and inhibits cross-pollination of findings due to lack of common interpretive and integrative frameworks, or even search terms.

2.4.2.2. *Lack of research integration:*

In addition to this lack of unifying nomenclature, the progressive paradigm further suffers on account of its *ad hoc*, disorganised, unrefined, and un-integrated nature. While I have attempted to integrate its various sub-paradigms using Trotsky's dialectical approach as an integrative framework, this is – as far as I have identified – a novel approach for integrating theories that, while complementary, currently exist in a fragmentary state; originating from disparate schools of thought and disciplines, drawn from varying case-studies. With the very concept of a 'progressive paradigm of IV' being my own heuristic construct, we lack literature reviews, dedicated journals or edited volumes to synthesise or even collate its various components, and the average scholar working on any one of these components is unlikely to be aware of the constellation of complementary and potentially interacting components identified in this review⁶²¹: In the same way that we lack studies/reviews mapping/conceptualising the entire progressive paradigm (i.e., all theories/approaches conforming to its foundational assumptions), it is rare to find the entire progressive paradigm applied to – or expressed through - a single case-study. This lack of integration, synthesisation, or comprehensive application has two important ramifications: Firstly, we have little understanding of how the different constellations of variables/mechanisms/sub-paradigms interact with each other, which is most influential, and under what circumstances. This, in turn, has practical implications, in that the progressive paradigm's *ad hoc* composition leaves little guidance for systematic analogous reasoning between case studies informing certain theories, and the current events we are attempting to understand and address. This encourages a resort to intuitive, 'ahistorical historicism' that often results in different analysts/policymakers drawing different conclusions depending on the historical case-study they reference, and the analytical framework through which

⁶²¹ As attested by my own struggle in developing it. For example, a discourse/communications theorist focussed on framing perspectives (an ideology-centric theory) is unlikely to consider it in direct relation to the organisational (movement-centric) approaches popular among many social movement theorists; a historian drawing conclusions from the French Revolution is unlikely to figure prominently on the radar of an area studies expert researching current Islamist insurgencies in North Africa.

they compare that historical case-study to the contemporary circumstances (see chapter 3).

2.4.2.3. *Lack of research on IV's affective dynamics:*

As noted, progressive paradigm research has done little to account for – or even acknowledge – IV's seemingly self-evident affective dynamics. This has made it unconvincing to many, prompting the *ad hoc* and problematic importing of conservative paradigms constructs; as discussed in the next chapter.

2.4.2.4. *Questionable effectiveness of mitigating repertoires:*

'Classical' COIN doctrine has faced criticism for its dependence on material incentives for disengagement, reconciliation, and legitimacy building. Not only does this de-politicise (and thus ignore) the root causes of conflict, it also neglects the well-attested affective dynamics. For example, by assuming establishment legitimacy can be restored by providing modern infrastructure, services, and amenities, 'classical' COIN ignores well-substantiated affective dynamics of ideological thinking, such as tribal, Manichean thinking or the filtering and/or distorting of world-view challenging information (which might result in such projects being dismissed out of hand as obvious manipulation or even corrupting cultural imperialism). This becomes further complicated when the line between insurgency and other types of conflict like civil wars becomes blurred. When grievances are no longer chiefly about socioeconomic deprivation, material incentives can only play a tertiary role to more urgent issues of insecurity, distrust, and animosities. As Biddle notes of the application of 'classical' COIN techniques to post-Saddam Iraq, "economic aid or reconstruction assistance cannot fix the problem: would Sunnis really get over their fear of Shiite domination if only the sewers were fixed and the electricity kept working?⁶²²".

Stabilisation doctrine, too, has detractors. While closer to moving beyond 'classical' COIN's dependence on material incentives, critics note several dangers inherent to its ethos on security as a pre-requisite to – rather than product of – conflict resolution:

⁶²² Fitzsimmons, "Hard Hearts," 360.

Firstly, policymakers are inclined to reinforce the power and monopoly-on-force of the incumbent regime, even if that regime's behaviour is the primary cause of conflict⁶²³.

Secondly, prizing stability above all else can marginalise calls for the reforms necessary to resolve the causes of conflict, given that the tumult caused by such reforms are the antithesis of stability⁶²⁴.

Thirdly, there exists high potential for stabilisation operations to be abused. Those implementing stabilisation interventions are often themselves party to the conflict, making identifying stabilising agents and spoiling forces a partisan endeavour⁶²⁵. Stabilisation can thus become a masquerade for repression.⁶²⁶ Additionally, stabilisation operations may perpetuate conflict. On one hand, regimes may become dependent on stabilisation aid and deliberately perpetuate instability to justify continued foreign patronage, becoming what Karlsrud call "counterterrorism racketeers"⁶²⁷. On the other hand, stabilisation operations often use the incentive of political office/privileges to sway movement actors into acquiescing to the *status quo*. The danger is that such incentivising may encourage violence from other actors seeking such privileges, as the line between rewarding relinquishing violence blurs with that of committing violence⁶²⁸.

Finally, strategies of empowering 'moderate' movements have been controversial. In addition to disputes over how to define 'moderates' and 'extremists', and the subjective nature of doing so by actors who are party to the conflict (see below), critics doubt whether this strategy would actually negate the appeal of 'extremist' movements. In particular, the population may suspect externally-empowered movements to be mercenaries for foreign interests, enhancing the legitimacy of 'independent' 'extremist' movements who may appear more legitimate and sincere in comparison⁶²⁹. More broadly, analysts

⁶²³ Keen and Attree, *Dilemmas of counter-terror*, iv & 10; Belloni & Costantini, "From Liberal Statebuilding," 513; Ginty, "Against Stabilization," 20 & 26; Belloni & Moro, "Stability," 455-456.

⁶²⁴ Keen and Attree, *Dilemmas of counter-terror*, 2; Belloni & Costantini, "From Liberal Statebuilding," 418; Mac Ginty, "Against Stabilization," 27.

⁶²⁵ Belloni & Moro, "Stability," 457.

⁶²⁶ Keen and Attree, *Dilemmas*, iv; Collinson, et al., "States of fragility," 227.

⁶²⁷ Karlsrud, "From Liberal Peacebuilding," 11; Keen and Attree, *Dilemmas*, iv-v.

⁶²⁸ Keen and Attree, *Dilemmas*, 12.

⁶²⁹ Faysal Itani, "Defeating the Jihadists in Syria: Competition before Confrontation," *Atlantic Council* (Apr., 2015). Available at:

caution that empowering any non-state actor will likely exacerbate and prolong episodes of IV, being liable to exacerbate communal conflicts (a major cause of IV) by appearing to empower one party at the expense of those it is believed to threaten⁶³⁰. Additionally, empowering armed non-state actors complicates efforts at DDR and integration: integrating armed non-state actors into the new state apparatus may stoke future communal conflicts by threatening their former opponents while, if they are not integrated, renewed communal conflict could occur from their sense of marginalisation/betrayal, making them easy prey for ideologies/movements⁶³¹.

2.4.2.5. *Insufficient causal regression:*

Like the conservative paradigm, progressive paradigm research suffers from insufficient causal regression, beginning their analysis with attempts to ascertain ideological-popularisation while neglecting ideological-emergence. In addition to fostering reactive mitigating repertoires, this omission leaves analyses open to sweeping and non-scientific assumptions, notably that movement cadres (those supporters active prior to the onset of crisis conditions) must be irrational and psychologically maladjusted, and so cannot be reasoned with or accommodated⁶³². As noted in chapter 1, this does not withstand empirical scrutiny.

2.4.3. Empirical problematisation:

Empirically, progressive paradigm research suffers from issues of contingency and insufficiency. For every case-study where a middle-range theory/sub-paradigm appears to apply, others can be found where it does not. Similarly, for each hypothesised variable/mechanism, multiple potential outcomes may spring from them. The result is that these middle-range theories/sub-paradigms, while valuable, are uncomfortably causally *insufficient*, and often *unnecessary*. For example:

1) *Ideology-centric theories:*

https://www.files.ethz.ch/isn/190840/Defeating_the_Jihadists_in_Syria_Competition_before_Co_nfrontation.pdf, 3-4.

⁶³⁰ Decina, "Meet Syria's Fake Moderates."

⁶³¹ Sibylle Scheipers, "Auxiliaries at War in the Middle East," *Survival* 57(4) (2015), 122-131.

⁶³² I expand upon this in the next chapter.

- a. Empirical and Experiential resonance: firstly, when rival anti-establishment ideologies compete, we lack guidance as to what gives one an empirical or experiential edge over its rivals. Regarding the Sunni-Lebanese case-study, what made Pan-Arab Nationalism more experientially-resonant than its Marxist and Islamist competitors during the 1950s? All three resonated with the experience of imperialist interference while, arguably, Islamism was more resonant with grievances against Maronite-Christian domination, and Marxism more resonant with wealth disparities⁶³³. Moreover, by the 1960s, Sunni-Lebanese ideological sentiments had shifted considerably (towards Marxism), yet their grievances had not⁶³⁴. This is complicated further by the above-noted social construction of grievances, and cultural constraints on resonance. Take, for example, the case of the 2019 UK parliamentary elections: Arguably, the radical socialism of Corbynism was both empirically and experientially more resonant to a population vocally discontented over socioeconomic malaise and austerity. Despite this, Corbyn's Labour suffered a crushing defeat, both because the Conservative party successfully constructed these grievances as products not of capitalist excesses but of EU interference over Britain's economic policy (social construction of grievance) and, simultaneously, employed culturally-resonant anti-socialist canards to fearmonger over Corbyn's political platform (cultural resonance). Thus, such theories leave many questions unanswered.
- b. Cultural resonance: while often empirically fruitful, this theory suffers from two major empirical flaws. Firstly, while the cultural resonance hypothesis has been used to explain the delayed progress of various ideologies/movements – notably the delayed progress of secular Pan-Arab Nationalism among Lebanon's Sunnis⁶³⁵, of capitalism in non-

⁶³³ See Chapters 6, 7.

⁶³⁴ Ibid.

⁶³⁵ Daniel Pipes makes this argument when, speaking of Lebanon's Sunnis during the 1940s, he writes: "Almost everything about pure Pan-Syrian nationalism contradicts the spirit of Islam. It disregards religious distinctions, equates non-Muslim with Muslim, glorifies pagan antiquity, and puts undue emphasis on the history, culture, and bloodlines of a territory. Extreme attachment to a piece of territory is un-Islamic—not precisely against the religious law but very much against its spirit." This, of course, fails to explain Arab Nationalism's later mass appeal in the region - Daniel Pipes, *Greater Syria: The History of an Ambition* (New York: Oxford University Press, 1990), 41.

Protestant societies⁶³⁶, and of atheistic/anti-clerical, revolutionary socialism among religious, Tsar-venerating Russian peasants⁶³⁷ - in all three of the above-cited cases, the culturally un-resonant ideology did eventually popularise, meaning we must identify what changed to allow this to happen. Moreover, many – if not most – ideologies exist explicitly in opposition to the cultural *status quo*, their very *raison d'être* being to overhaul the antiquated old order and/or subvert cultural norms designed to obscure class privileges and exploitation⁶³⁸. Thus, while such movements may popularise more slowly than culturally-resonant ones, they are certainly not inhibited from popularising, nor from becoming culture-changing⁶³⁹ mass movements.

2) *Movement-centric theories:*

- a. While superior resources/capital does often seem to give movements a competitive edge over their rivals, less well-resourced movements have frequently found effective workarounds. Terrorist groups have become adept at winning support through notoriety; launching high profile attacks with the dual purpose of provoking an overreaction from the authorities that alienates the masses, radicalises the moderates and legitimises the actions of the rebels⁶⁴⁰, and of portraying themselves as the most serious and committed group vis-à-vis

⁶³⁶ Max Weber, *The Protestant Ethic and the Spirit of Capitalism*, trans. Talcott Parsons (London and New York: Routledge, 1992 [1930]).

⁶³⁷ Faulkner, *A People's History*, 71.

⁶³⁸ Notably Marxism – with its emphasis on subverting the hegemonic ideologies of the ruling elites – as well as post-modernist ideologies such as feminism and LGBT+ Pride, with their respective emphases on subverting patriarchal and heteronormative cultural norms, etc.

⁶³⁹ Indeed, as many scholars note, ideologies can actually contribute to cultural formation; their once alien agendas coming to be held as common sense by all but the most stubborn members of society over time (observe, for example, changing attitudes to women in light of the feminist movement): Zald, "Culture," 271; David S. Meyer and Nancy Whitter, "Social Movement Spillover," *Social Problems* 41(2) (May 1994), 281; Tuen A. Van Dijk, "Ideology and discourse analysis," *Journal of Political Ideologies* 11(2) (2006), 117; and Tuen van Dijk, "Discourse, Ideology and Context," *Folia Linguistica* 36(1-2) (2002), 16.

⁶⁴⁰ Geltzer, *US Counter-terrorism*, 75; Andrew Kydd, and Barbara Walter, "The Strategies of Terrorism," *International Security*, 31(1) (2006): 49-80; and Ariel Merari, "Terrorism as a Strategy of Insurgency," *Terrorism and Political Violence*, 5(4) (1993): 213-51.

ideological rivals (“outbidding”)⁶⁴¹. Moreover, ideologies have often been able to challenge the establishment ideology, despite the state’s ability to monopolise public discourse and prevent the organising of opposition through repression⁶⁴².

3) *Relational theories:*

- a. The conclusion that successful ideologies negate on principle the establishment ideology is unhelpful when the establishment ideology can be negated by various ideologies. Which, for example, is the greater negation of al-Assad’s Allawi-chauvinist, secular, sectarian, crony-capitalist, autocratic regime? the Islamist, Sunni chauvinism of groups like IS, *Jabhat al-Nusra* [JaN], etc., the officially anti-sectarian, democratic ideology of the FSA, or the anti-capitalist, anarchistic – if somewhat Kurd-chauvinist – *Syrian Democratic Forces*? Further complicating the issue is the fact that less radical movements frequently outcompete more radical ones, such as the consolidation of centrist oppositional political parties (vis-à-vis more radical ones) in opposition to right wing governments in the UK and US⁶⁴³. Finally, the notion of the primacy of negation sits uncomfortably with the theory of cultural restraints on resonance. Again, the cases of recent electoral politics in the UK and US is instructive, with culturally-resonant anti-socialist canards channelling opponents of the right away from the overt socialism of Corbyn and Sanders, and towards the safer centrism of Starmer and Biden.
- b. Political process models positing the advantage of non-repressed movements over repressed ones similarly unravel in the face of

⁶⁴¹ Observing the advent of Fatah suicide bombings during the Second Palestinian Intifada in response to the rising popularity of Hamas, Bloom has postulated that insurgent groups will attempt to ‘outbid’ their rivals through escalating the extremeness of their ideology and agenda (Mia Bloom, *Dying to Kill: The Allure of Suicide Terror* (New York: Columbia University Press, 2005)). Such a trend has been noted less explicitly by Goldstone, who noticed that French moderates following the revolution felt compelled to radicalise in order not to be subsumed by the more popular radicals (Goldstone, “Ideology,” 416). Similarly, Koopmans has noted a tendency for rival social movements to increase their radical rhetoric as a means of monopolising ownership over an ideology (Koopmans, “Dynamics of Protest Waves,” 468).

⁶⁴² Such can be said to have been the case across several authoritarian Arab states, such as Shi’a Islamism under Saddam Hussein’s Iraq, Ikhwanism in Egypt and Syria, haraki Salafism in Saudi Arabia, etc. We might also say the same of both nationalist and socialist ideologies in repressive reactionary post-Napoleonic Europe.

⁶⁴³ Here I refer to the rightward swing in the UK labour party following Corbyn’s defeat in the 2019 parliamentary elections alongside the loss of Sanders to Biden in the US Democratic primaries.

empirical evidence that the experience of repression can, in some cases, aid a movement's popularity, on one hand by making martyrs of them (which can inspire both sympathy, comradeship, and admiration)⁶⁴⁴ and, on the other hand, by discrediting non-repressed movements who may appear to have been co-opted by, or to have sold-out to, the regime⁶⁴⁵. Likewise, it has been observed that, if repression extends beyond a movement's active members to those it claims to represent, it will foster solidarity between them, validating that ideology's/movement's injustice claims, and driving the populace into their protection⁶⁴⁶.

In addition to these empirically problematic middle-range theories/sub-paradigms, the reification of 'classical' COIN doctrine has also been empirically fractious. As noted, 'classical' COIN has been constructed and reified according to a very small-N case sample and, moreover, those few cases have often been misleadingly recounted. Moreover, however, as Gentile notes, 'classical' COIN

⁶⁴⁴ Take for instance the aftermath of the 1916 *Easter Rising* in Ireland. While the Irish rebels received little support (and much hostility) from the Irish population at large prior to and during the Rising, they enjoyed a meteoric rise in popularity as a result of the harsh repression they suffered at the hands of the British authorities in the aftermath of their aborted revolution; which led to their being re-cast as martyrs. See: Jonathan Githens-Mazer, *Myths and Memories of the Easter Rising: Cultural and Political Nationalism in Ireland* (Dublin: Irish Academic Press, 2006); Michael Laffan, *The Resurrection of Ireland: the Sinn Féin Party, 1916–1923* (Cambridge: Cambridge University Press, 1999); and Kieran Allen, *1916: Ireland's Revolutionary Tradition* (London: Pluto Press, 2016).

⁶⁴⁵ In Chapter 7 we will see the deleterious toll collaboration with the Syrian occupation had on the popularity of various movements previously popular with the Sunni-Lebanese community. A particularly dramatic recent case of such pertains to IS, which many Syrians have come to accuse of being a stooge of the Syrian regime. This accusation is based in large measure on the belief that the Syrian regime has made only token attempts to combat the group, while tacitly supporting its attacks on the broader Syrian opposition movement through airstrikes. See: Phillips, *The Battle for Syria*, 199; Michael Becker, "When Terrorists and target governments cooperate: the case of Syria," *Perspectives on Terrorism* 9(1) (2015); Russ Wellen, "Syrian President Assad Using Islamic State to Defeat Other Rebel Factions," *Foreign Policy in Focus*, dated June 9 2015. Accessed November 5 2019. Available at: <https://fpif.org/syrian-president-assad-using-islamic-state-to-defeat-other-rebel-factions/>; Aymenn al-Tamimi, "The Assad Regime and Jihadis: Collaborators and allies?" *Syria Comment*, dated February 11 2014. Accessed November 5 2019. Available at: <https://www.joshualandis.com/blog/assad-regime-jihadis-collaborators-allies/>; Pamela Engel, "Why Assad's air force is now a force multiplier for ISIS," *Business Insider*, dated June 4 2015. Accessed November 5 2019. Available at: <https://www.businessinsider.com/why-assads-air-force-is-now-a-force-multiplier-for-isis-2015-6?r=US&IR=T>; Brian Fishman, "With friends like these: al Qaeda and the Assad Regime," *War on the Rocks*, dated January 27 2014. Accessed November 5 2019. Available at: <https://warontherocks.com/2014/01/with-friends-like-these-al-qaeda-and-the-assad-regime/>; Maysam Behraves, "Assad's strategic use of ISIL made his victory in Syria possible," *al Jazeera*, dated October 18 2018. Accessed November 5 2019. Available at: <https://www.aljazeera.com/indepth/opinion/assad-strategic-isil-victory-syria-181016124014853.html>

⁶⁴⁶ Mohammed M. Hafez, *Why Muslims Rebel: Repression and Resistance in the Islamic World* (Boulder, Colorado: Lynne Rienner Publishers, Inc., 2003), 80.

has a poor track record for success, often serving only to expensively and bloodily prolong almost foregone conclusions (particularly during the anti-colonial liberation struggles)⁶⁴⁷. As such, the esteem with which 'classical' COIN doctrine is often held appears undeserved. As the next chapter will elucidate, the 'new' COIN that sprung from it in during the GWOT has done little to improve this trend.

2.4.4. Political problematisation:

Finally, while progressive paradigm mitigating/remedial repertoires appear less ideological in their willingness to acknowledge the legitimacy of stated grievances (alongside their tendency to – usually - eschew pejorative, dehumanising, and delegitimising conservative paradigm nomenclature like 'extremism'), they in fact remain *status quo*-normative, and foster partisan outcomes:

Firstly, grievance acknowledgement is often less extensive than assumed. This is because 'classical' COIN seeks to address grievances by de-politicising them, reducing legitimacy crises to failures in service provision and stability (i.e., inefficiency in realising the establishment ideological vision). Thus, COIN ignores deeper systemic, cultural, or historical discontents that may be fuelling IV (e.g., historical legacies of distrust and animosity, differing cultural notions of legitimacy, inter-communal power imbalances, etc.) and only entertains solutions that redress grievances *within* the framework of the establishment ideology, rather than acknowledging the establishment ideology may be inducing grievances itself.

Stabilisation strategies improve upon this slightly by recognising grievances beyond material deprivations, however they still only entertain resolutions within the establishment ideology's framework; something reinforced by its insistence on stability/security as a pre-requisite to addressing conflict causation. This often results in uncompromising movements being condemned as 'spoilers' when they refuse to countenance the superficial grievance resolutions offered by stabilisation interventionists. 'Spoiler' thus becomes a political label akin to 'extremist' or 'radical' used to discredit movements who might otherwise be called 'freedom fighters' or 'revolutionaries'⁶⁴⁸. We must remind ourselves that individuals like Martin Luther King, Jr. and Nelson Mandela

⁶⁴⁷ Gentile, "The conceit of American counter-insurgency," 1.

⁶⁴⁸ Keen and Attree, *Dilemmas*, 10.

- who refused to be pacified by internal tweaks to systemically racist *status quos*
- would be considered ‘spoilers’ under such a framework.

Finally, empowering ‘moderate’ movements is politically problematic. As noted, delineating ‘moderates’ from ‘extremists’ is an inherently subjective undertaking⁶⁴⁹, and one rarely left to the discretion of the populations being ‘liberated’ by such empowerment. Rather, outside interventionists proclaim as ‘moderate’ those they perceive will best serve their foreign policy goals, regardless of how well they represent the population’s sentiments. As noted, judgement usually stems from arbitrary distinctions between those ideologies we like and those that we don’t, which is itself frequently determined by Western-centric secular biases. Thus, it can become an exercise not in peace-making but in hegemony, and as such may stoke further conflict should those empowered but potentially less popular movements become sources of grievance themselves.

2.5. Conclusion:

This chapter has shown that the progressive paradigm – like its conservative rival – is flawed and/or insufficient across the methodological, conceptual, empirical, and political domains. Its foundational assumptions are equally ideological to those of the conservative paradigm, ranging from pro-establishment ideology, Western-centrism on one hand, to anti-establishment ideology and/or impulsive anti-hegemonism on the other. Conceptually, its commendable lack of constraining/corralling nomenclature is balanced by a lamentable lack of unifying, consensual, and operationalised nomenclature whatsoever. Empirically, it is riven by issues of insufficiency and contingency, undergirded by a pervasive lack of clarity over how far theories/sub-theses drawn from widely differing case-studies can be generalised, while it struggles or even neglects to address the vitally important affective dynamics of IV. Finally, its remedial repertoires suffer the same *status quo*-normative biases of the conservative paradigm - albeit wrapped in a more humanitarian, benevolent garb – alongside the same lack of mechanisms for measuring their effectiveness.

As with the conservative paradigm, the progressive paradigm has shown its limitations over the course of the GWOT, prompting clumsy attempts to

⁶⁴⁹ Discussed further in chapter 3.

combine the best qualities of both paradigms. This synthesising 'hybrid' paradigm – its construction, its frailties, and its crisis of confidence – is the subject of chapter 3; the last of the problematisation chapters.

Chapter 3: The Global War on Terror and attempts at paradigm synthesis:

3.

This final chapter of Part I explores and critiques extant attempts to synthesise the conservative and progressive paradigms, which began on a concerted level in response to the popular Islamist insurgencies in occupied Afghanistan and Iraq, which defied easy categorisation under either extant paradigm. These efforts – which were largely *ad hoc* and practitioner-driven – coalesced into a new ‘hybrid’ paradigm that attempted to incorporate the most useful elements from each extant paradigm in order to cover each paradigm’s limitations. It attained a broad degree of orthodoxy, becoming the foundation for a new generation *counterinsurgency* [COIN] doctrine, most official discourses on the GWOT and 2011 Arab Uprisings, and much mainstream scholarly, journalistic, and think-tank commentary on non-domestic Islamist IV.

This is not the end of the story, however, as the hybrid paradigm soon lost credibility in the eyes of many, particularly on account of two key developments: 1) the apparent failure of strategies built upon its premises to produce consistent strategic success; and 2) an atmosphere of moral panic and ‘folk-devilling’ promoted by the terror of the self-styled *Islamic State* [IS] movement. The resulting ‘paradigm vacuum’ and general demoralisation has resulted in a somewhat ‘anarchic’ turn in thinking about Islamist IV, characterised by recourse to idiosyncratic reasoning rooted far more in societal prejudices, preoccupations, and folk-narratives than social-scientific study.

This chapter does two things:

- 1) As before, I demonstrate how GA can help ‘reset’ the debate on IV causation by ‘dissecting’ the hybrid paradigm, its subsequent fall from grace, and resulting ‘anarchic turn’ in IV theorising.
- 2) I finish problematising extant thought on the causation of IV and, in doing so, complete laying out the rationale for Part II of this study: the urgent need to construct a new, methodologically-rigorous IV paradigm that avoids the traps, pitfalls, and limitations that have befallen its predecessors.

Specifically, the chapter proceeds as follows: Section 3.1. briefly summarises the hybrid paradigm. Section 3.2. presents a GA of how the hybrid paradigm came to be. Section 3.3. critiques the hybrid paradigm, demonstrating its inadequacy. Section 3.4. then presents a GA of the hybrid paradigm's fall from grace and outlines and critiques the current 'anarchic turn' characterising Islamist IV theorising.

3.1. The 'hybrid' paradigm – a brief overview:

The hybrid paradigm that coalesced out of the challenges posed by the threat of Islamist IV from 2001 onwards can best be understood as a formalisation and variation on the progressive paradigm's 'exploitation' sub-paradigm, which itself came into its own during this period. This was achieved, however, by arbitrarily assuming a stratified IV 'imaginary' that pictured a hard distinction between a minority 'hardcore' of ideological 'extremists' conceptualised according to conservative paradigm assumptions and a majority, 'mass base' of 'rational hedgers' motivated by progressive paradigm assumptions.

It was reasoned that abhorrent and 'irrational' extremist Islamist movements (al-Qaeda, the Taliban, IS, etc.) which, under 'normal' circumstances, could only appeal to the deviant minority, were managing to attain popular support by exploiting the insecurity and legitimate grievances of the masses. Address these concerns of the rational majority – it was reasoned – and the 'extremist' minority would lose their appeal to, and leverage over, the majority, become isolated, and become easy targets for kinetic kill-or-capture missions.

3.2. The road to the hybrid paradigm – a genealogical analysis:

The hybrid paradigm was born directly out of attempts to come to terms with and confront the GWOT Islamist enemy. It can be broken down into three fairly clear-cut stages: 1) the initial GWOT strategic narrative; 2) the scramble for a new COIN strategy for Iraq and Afghanistan capable of combating the 'new' 'terrorist insurgencies'; and 3) a mainstreaming of the paradigm following the new COIN strategy's apparent success in Iraq:

3.2.1. The GWOT strategic narrative, 2001-2003:

As briefly noted in chapters 1-2, the usually neat, if implicit, dichotomy between conservative and progressive paradigms began to blur upon commencement of the GWOT. On one hand, the Bush administration maintained its predecessors'⁶⁵⁰ progressive counterinsurgent iteration explanations for non-domestic Islamist IV, asserting an *exploitation* sub-paradigm logic in which “poverty, deprivation, social disenfranchisement, and unresolved political and regional disputes,” were exploited by Islamist movements wishing to misguide the “poor and destitute masses”⁶⁵¹. On the other hand, the seemingly irrational, murderous anti-Americanism of Islamist IV seemed to require a more conservative paradigm *ideological persuasion* explanation: anti-American grievances being conjured *ex nihilo* and impressed upon the psychologically or culturally ‘vulnerable’.

Evidence of *ideological persuasion* – according to the Bush administration – was abundant; found in the indoctrination activities of ‘extremist’ madrassas⁶⁵², scapegoating autocratic regimes⁶⁵³, and an apparent doctrinal ‘civil war’ for the soul of Islam⁶⁵⁴. Furthering this confused diagnosis was an articulated IV ‘imaginary’ that divorced Islamist IV from worldly concerns, attributing it to a perverted, chauvinistic interpretation of Islam commanding the killing of unbelievers and imposition of their interpretation of Islamic law on the unwilling (*à la exporting extremism/Islamic civil war and obediently violent sub-paradigms*)⁶⁵⁵.

Such mixed/unclear messaging pervaded the strategic narrative justifying Afghan and Iraqi interventions. The logic behind deposing dictatorships and installing democracies was, on one hand, conservative paradigm-aligned, with democratic values viewed as an ‘antidote’ to the ‘terrorist’ values (anti-pluralism,

⁶⁵⁰ Clinton and Bush, Snr., as noted in Chapters 1 & 2. The Bush Snr., and, particularly, the Clinton administration sought to explain the rapid proliferation of Islamist movements in the 1990s Middle East and North Africa by asserting that “‘the roots of extremism and terror’ were to be found in ‘economic stagnation and poverty,’ not religion” – Secretary of State Warren Christopher, quoted and paraphrased in Little, *Us versus Them*, 122.

⁶⁵¹ As asserted in the Bush Administration’s February 2003 *National Strategy for Combatting Terrorism* (“National Strategy for Combatting Terrorism”).

⁶⁵² Kurzman, *The Missing Martyrs*, 67.

⁶⁵³ “The National Security Strategy of the United States of America, September 2002,” 31.

⁶⁵⁴ *Ibid*, 31.

⁶⁵⁵ Paraphrased from Bush’s September 2001 *State of the Union Address* – quoted directly in chapter 1. For the original reference, see: “State of the Union Address 2001”. A coterminous speech by Tony Blair affirmed the fanatical, irrational, totalitarian, and intolerant impulses driving such perpetrators – articulated as implied antonyms to the values of the West: “‘Our beliefs are the very opposite of the fanatics. We believe in reason, democracy and tolerance’”. See: “Full text of Blair’s speech”.

intolerance, scape-goating the West, etc.) cultivated by Middle East autocrats and Mullahs⁶⁵⁶. However, a simultaneous non-domestic Cold War-style progressive paradigm logic was also expressed, in which Islamists – like their communist predecessors – were popularising because oppressed, deprived populations were desperate for *any* deliverance (and would inevitably choose Western modernity over backwards Islamism if offered to them). Bush, resurrecting Cold War MT, was so convinced of the universal appeal of ‘freedom’⁶⁵⁷ [read: US modernity] that he assumed liberated populations would gratefully welcome US troops delivering it⁶⁵⁸. Thus was it envisioned that deposed regimes could promptly be replaced by new, friendly, enthusiastically democratic, elected governments. Resistance was expected only from marginalised terrorists and former-regime elements who, devoid of popular support, could be kinetically neutralised⁶⁵⁹.

3.2.2. The search for a new COIN doctrine:

In the event, however, Coalition troops in Afghanistan and Iraq encountered considerable violent resistance following the formal cessation of combat and, despite prolonged, politically-motivated official denial⁶⁶⁰, commanders on the

⁶⁵⁶ “National Strategy for Combatting Terrorism,” 30.

⁶⁵⁷ Something he would continue to express throughout the GWOT – see below.

⁶⁵⁸ Tan, *U.S. Strategy*, 51; Colonel Joel. D. Rayburn, et al., *The U.S. Army in the Iraq War: Vol. 1: Invasion, Insurgency, Civil War, 2003-2006* (Carlisle Barracks, PA: United States Army War College Press, 2019), 35-36; Allawi, *The Occupation*, 173.

⁶⁵⁹ Toby Dodge, “Enemy Images, Coercive Socio-Engineering and Civil War in Iraq,” *International Peacekeeping* 19(4) (2012), 462; Collins, *Understanding War in Afghanistan*, 71. It was according to such expectations that the US would declare the end of major combat operations in Afghanistan by May 2002 following the routing of the *Taliban* and AQ leadership across the border into Pakistan (Rathnam Indurthy, “The Obama Administration’s strategy in Afghanistan,” *Internal Journal on World Peace* 28(3) (Sep., 2011), 8), and “mission accomplished” in Iraq in May 2003 following the collapse of formal Iraqi military resistance and flight into hiding of Saddam Hussein (Kathleen T. Rhem, “President Bush Proclaims End to Major Combat Ops in Iraq,” *Department of Defense*, dated May 1 2003. Accessed January 4 2020. Available at: <https://archive.defense.gov/news/newsarticle.aspx?id=29032>; Noah Bassil, “The US invasion and occupation of Iraq and the implications for the Middle East: instability and the unravelling of US hegemony,” in *Ending War, Building Peace*, eds. Lynda-Ann Blanchard and Leah Chan (New South Wales: Sydney University Press, 2009), 65).

⁶⁶⁰ Across both the military, the *Coalition Provisional Authority* [CPA] and Washington, this state of denial appears to have been driven both by a state of cognitive dissonance following the certainty with which they had internalised the GWOT’s strategic expectations of a grateful popular welcome as liberators coupled with a PR imperative to maintain the validity of the GWOT’s strategic narrative. See: Allawi, *The Occupation*, 185. See also: Innes-Robbins, *Dirty Wars*, Location 4978; and Nance, *The Terrorists of Iraq*, 12. In Afghanistan this denial was coupled with neglect: Following the deposition of the *Taliban* regime and establishment of the Karzai-led fledgling democratic government, the US promptly redirected the bulk of its attention and resources to Iraq, leaving only 10,000 US troops dedicated solely to terrorist hunting kinetic operations, and a 6,000 strong multinational *International Security Assistance Force* [ISAF] detachment whose operations were limited to peacekeeping within the capital Kabul. See:

ground soon acknowledged significant popular insurgencies, requiring a strategic shift from kinetic ‘terrorist-hunting’ to holistic COIN⁶⁶¹.

Bereft of an official COIN doctrine⁶⁶², commanders on the ground – acting independently – sought out 1960s ‘classical’ COIN literature as first port-of-call⁶⁶³. Accordingly, they internalised progressive paradigm insights on the need to compete with the insurgents for legitimacy among the broader ‘hedging’ population – chiefly through material appeals⁶⁶⁴. However, questions arose over the applicability of ‘classical’ COIN – with its progressive paradigm underpinnings – as a result of conflicting discursive and face-value empirical observations, which combined to simultaneously reify and question the GWOT’s paradigm-conflating IV imaginary:

3.2.2.1. *Reification of conservative paradigm narratives:*

Overwhelmingly, information conveyed to (and, occasionally, by) commanders reified the conservative paradigm aspects of the GWOT IV imaginary and strategy narrative. While these emergent discourse were diverse, they all attributed Iraqi and Afghan anti-coalition IV to conservative paradigm *ideological persuasion*, the *ex-nihilo* conjuring of grievances, and/or irrational impulses divorced from actual provocations/grievances:

Lieutenant Colonel Colin Jackson, “US Strategy in Afghanistan: a tragedy in five acts,” in *Our Latest Longest War: Losing Hearts and Minds in Afghanistan*, ed. Lieutenant Colonel Aaron B. O’Connell, USMC (Chicago and London: University of Chicago Press, 2017), 81-83; Innes-Robbins, *Dirty Wars*, Location 5226.

⁶⁶¹ In Afghanistan, the first prominent voice to call for such a switch was US Lieutenant General Barno in October 2003 (Jackson, “US Strategy in Afghanistan,” 83). In Iraq, the process was more *ad hoc* and bottom-up, with certain individual mid-level commanders independently attempting to improvise COIN strategies. See: Toby Dodge, “Iraq, US policy and the rebirth of counter-insurgency doctrine,” *Adelphi Series* 52(434-435) (2012), 79-80; David Fitzgerald, *Learning to Forget: US Army Counterinsurgency doctrine and practice from Vietnam to Iraq* (Stanford, CA: Stanford University Press, 2013), 142; Porch, *Counterinsurgency*, 307; and Ryan, *Full Spectrum Dominance*, 10.

⁶⁶² While COIN doctrine had been touched upon in a US strategic review of 1985, the US military had not conducted a major overhaul of COIN strategy since Vietnam – nor had it been taught in military educational courses; see: Mockaitis, “Trends in American Counterinsurgency,” 251 & 260; Fitzgerald, *Learning to Forget*, 154. While British COIN doctrine was more up-to-date, having released a COIN doctrine update in 2001, its teaching had been neglected in the Army Staff Collage and, moreover, commanders in Iraq’s urban environment struggled to discern how to apply a doctrine based predominantly on jungle warfare in the colonies or domestically in N. Ireland to this new environment; see: Innes-Robbins, *Dirty Wars*, Location 4918. Moreover, it had been deemed irrelevant by GWOT planners.

⁶⁶³ Innes-Robbins, *Dirty Wars*, 4947; Long, “Counter Insurgency,” 555; Fitzgerald, *Learning to Forget*, 170; Kilcullen, “Counterinsurgency,” 137; and Jackson, “US Strategy in Afghanistan,” 83.

⁶⁶⁴ Dodge, “Iraq, US policy,” 81; Jackson, “US Strategy in Afghanistan,” 83.

At the discursive level, conservative paradigm aspects of the IV imaginary were fostered the Bush/Blair administrations, but also by higher military echelons. Several narratives contributed:

- 1) The Iraqi and Afghan insurgencies lacked popular support⁶⁶⁵, as evidenced by impressive electoral turnouts (the population embracing democracy despite ‘terrorist’ intimidation)⁶⁶⁶; the courage exhibited by Iraqi and Afghan soldiers in defending their new democracies from terrorist attacks⁶⁶⁷; and reports that popular support for the insurgents was coerced⁶⁶⁸. These claims were encapsulated in a discourse that Coalition troops were playing an assistance role in both countries: assisting the populations to realise the freedom *they* desired, against ‘terrorist’ attempts to obstruct it⁶⁶⁹. Thus, the insurgency constituted a minority movement of *ideologically persuaded* deviants and/or regime loyalists, championing an ideology repugnant to the rational minds of ‘normal’ ‘freedom-loving’ Iraqis and Afghans.

⁶⁶⁵ Office of the Press Secretary, “President Bush Discusses Progress in Afghanistan, Global War on Terror,” *The White House*, dated February 15 2007. Accessed October 22 2020. Available at: <https://georgewbush-whitehouse.archives.gov/news/releases/2007/02/20070215-1.html>; Office of the Press Secretary, “President Discusses War on Terror and upcoming Iraqi elections,” *The White House*, dated December 12 2005. Accessed October 22 2020. Available at: <https://georgewbush-whitehouse.archives.gov/news/releases/2005/12/20051212-4.html>; Michaels, *The Discourse Trap*, 133.

⁶⁶⁶ “Full text: George Bush’s Iraq speech,” *The Guardian*, dated June 29 2005. Accessed October 22 2020. Available at: <https://www.theguardian.com/world/2005/jun/29/iraq.usa>; “President Bush’s Address to the Nation,” *The New York Times*, dated September 11 2006. Accessed October 22 2020. Available at: https://www.nytimes.com/2006/09/11/washington/12bush_transcript.html; Office of the Press Secretary, “President Bush Participates in Joint Press Availability with Prime Minister Maliki of Iraq,” *The White House*, dated November 30 2006. Accessed October 22 2020. Available at: <https://georgewbush-whitehouse.archives.gov/news/releases/2006/11/20061130-1.html>; Office of the Press Secretary, “President Discusses War on Terror and Operation Iraqi Freedom,” *The White House*, dated March 20 2006. Accessed October 22 2020. Available at: <https://georgewbush-whitehouse.archives.gov/news/releases/2006/03/20060320-7.html>; Office of the Press Secretary, “President Discusses War on Terror and upcoming Iraqi elections”; Office of the Press Secretary, “President Bush Discusses Global War on Terror,” *The White House*, dated May 22 2006. Accessed October 22 2020. Available at: <https://georgewbush-whitehouse.archives.gov/news/releases/2006/05/20060522-1.html>; Office of the Press Secretary, “President Bush Discusses Progress in Afghanistan, Global War on Terror,” *The White House*, dated February 15 2007. Accessed October 22 2020. Available at: <https://georgewbush-whitehouse.archives.gov/news/releases/2007/02/20070215-1.html>

⁶⁶⁷ Office of the Press Secretary, “President Bush Discusses Progress in Afghanistan”; Office of the Press Secretary, “President Bush Discusses Global War on Terror”.

⁶⁶⁸ Office of the Press Secretary, “President Discusses War on Terror and Operation Iraqi Freedom”; Office of the Press Secretary, “President Discusses War on Terror at National Endowment for Democracy,” *The White House*, dated October 6 2005. Accessed October 22 2020. Available at: <https://georgewbush-whitehouse.archives.gov/news/releases/2005/10/20051006-3.html>

⁶⁶⁹ Office of the Press Secretary, “President Bush Discusses Progress in Afghanistan”; “Full text: George Bush’s Iraq speech”.

- 2) Most insurgents were former-regime loyalists or foreign AQ jihadists⁶⁷⁰, the latter explicitly designating Iraq and Afghanistan as frontlines in their global jihad⁶⁷¹. Thus, the violence was imported, unrelated to indigenous conditions or sentiments - its perpetrators motivated by the same *obediently violent* ideology that had motivated 9/11⁶⁷². They fought without provocation, against the will of the indigenous population who rationally welcomed freedom.
- 3) The insurgents were motivated by hatred of 'freedom'⁶⁷³, which they opposed both ideologically (perceiving 'freedom' to be a cause of decadence)⁶⁷⁴ and strategically (because, given freedom to choose, 'normal' people would never embrace their warped, hateful ideology)⁶⁷⁵.

⁶⁷⁰ Office of the Press Secretary, "President Discusses War on Terror and Operation Iraqi Freedom"; "State of the Union Address," *The White House*, dated January 20 2004. Accessed October 22 2020. Available at: <https://georgewbush-whitehouse.archives.gov/news/releases/2004/01/20040120-7.html>; Office of the Press Secretary, "President Outlines Steps to Help Iraq Achieve Democracy and Freedom," *The White House*, dated May 24 2004. Accessed October 22 2020. Available at: <https://georgewbush-whitehouse.archives.gov/news/releases/2004/05/20040524-10.html>; Office of the Press Secretary, "President Discusses War on Terror and upcoming Iraqi elections"; Office of the Press Secretary, "President Bush Discusses Global War on Terror"; House of Commons Defence Committee Iraq, *An Initial Assessment of Post-Conflict Operations Sixth Report of Session 2004–05: Volume 1* (London: The Stationery Office Limited, 2005). Available at: <https://publications.parliament.uk/pa/cm200405/cmselect/cmdfence/65/65i.pdf>, 22.

⁶⁷¹ "Full text: George Bush's Iraq speech"; "President Bush's Address to the Nation"; Office of the Press Secretary, "President Discusses War on Terror at National Endowment for Democracy"; Office of the Press Secretary, "President Outlines Steps"; Office of the Press Secretary, "President Discusses Democracy in Iraq with Freedom House," *The White House*, dated March 29 2006. Accessed October 22 2020. Available at: <https://georgewbush-whitehouse.archives.gov/news/releases/2006/03/20060329-6.html>

⁶⁷² "Full text: George Bush's Iraq speech"; Office of the Press Secretary, "President Discusses War on Terror and upcoming Iraqi elections".

⁶⁷³ Insurgents in Iraq were routinely labelled "enemies of free Iraq," (Office of the Press Secretary, "President Discusses Democracy in Iraq"; Office of the Press Secretary, "President Discusses War on Terror and Operation Iraqi Freedom"; Office of the Press Secretary, "President Discusses War on Terror and upcoming Iraqi elections"; Office of the Press Secretary, "President Bush Discusses Global War on Terror"); insurgents in Afghanistan simply "enemies of freedom" (Office of the Press Secretary, "President Bush Discusses Progress in Afghanistan"; Office of the Press Secretary, "President Bush Visits with Troops in Afghanistan," *The White House*, dated December 15 2008. Accessed October 22 2020. Available at: <https://georgewbush-whitehouse.archives.gov/news/releases/2008/12/20081215-1.html>). For more general discourse along this theme, see: "State of the Union Address 2004"; "Full text: George Bush's Iraq speech".

⁶⁷⁴ Office of the Press Secretary, "President Discusses War on Terror at National Endowment"; "Full text: George Bush's Iraq speech"; Office of the Press Secretary, "President Bush Discusses Global War on Terror".

⁶⁷⁵ "Full text: George Bush's Iraq speech"; "President Bush's Address to the Nation"; Office of the Press Secretary, "President Bush Discusses Global War on Terror"; "Full text: Tony Blair's speech".

- 4) The insurgents were 'killers'⁶⁷⁶ driven by a warped understanding of Islam that commanded them to kill unbelievers as its own end⁶⁷⁷. As such, they were not responding to any provocation, nor were they open to rational or material appeals; less still compromise or negotiation⁶⁷⁸. This discourse was reinforced by appeals to Muslims to denounce this perversion of their faith⁶⁷⁹ - suggesting a civil-war within Islam⁶⁸⁰, fought over doctrine not grievances.
- 5) The insurgents were attempting an imperialist conquest aimed at creating a totalitarian Islamic empire⁶⁸¹. Their stated grievances were shameless covers for this project⁶⁸².
- 6) Indigenous insurgents were 'sore losers' embittered at having lost their old privileges (particularly in Iraq where the insurgency was perceived as a strictly Sunni phenomenon⁶⁸³). While based less on ideological

⁶⁷⁶ Office of the Press Secretary, "President Bush Discusses Progress in Afghanistan"; Office of the Press, Secretary, "President Bush Visits with Troops in Afghanistan"; "State of the Union Address 2004"; "Full text: George Bush's Iraq speech"; "National strategy for combatting terrorism, September 2006," *The White House*, dated September 2006. Accessed February 12 2020. Available at: <https://georgewbush-whitehouse.archives.gov/nsc/nsct/2006/>

⁶⁷⁷ Office of the Press Secretary, "President Discusses War on Terror at National Endowment"; "Full text: George Bush's Iraq speech"; "President Bush's Address to the Nation"; "National strategy for combatting terrorism, September 2006".

⁶⁷⁸ See footnote 670 above.

⁶⁷⁹ Office of the Press Secretary, "President Discusses War on Terror at National Endowment"; "National strategy for combatting terrorism, September 2006".

⁶⁸⁰ Ryan, *Full Spectrum Dominance*, 136.

⁶⁸¹ "National strategy for combatting terrorism, September 2006"; Office of the Press Secretary, "President Discusses War on Terror at National Endowment"; Office of the Press Secretary, "President Outlines Steps to Help Iraq Achieve Democracy"; Office of the Press Secretary, "President Discusses War on Terror and upcoming Iraqi elections"; Office of the Press Secretary, "President Bush Discusses Global War on Terror"; "President Bush's speech on terrorism," *The New York Times*, dated September 6 2006. Accessed October 22 2020. Available at: https://www.nytimes.com/2006/09/06/washington/06bush_transcript.html; Office of the Press Secretary, "President Discusses War on Terror at National Endowment"; "President Bush's Address to the Nation".

⁶⁸² Office of the Press Secretary, "President Discusses War on Terror at National Endowment".

⁶⁸³ This theory seems to have emerged out of military circles – with the literature noting it coming out of 1) the briefings of CPA head Bremer to President Bush in June 2003 (Dodge, "Enemy Images," 468); and 2) military intelligence 'red teaming' exercises for US General Casey in summer 2004 (Timothy Andrews Sayle and Hal Brands, "Introduction: The American Occupation of Iraq by 2006 and the Search for a New Strategy," in *The Last Card: Inside George W. Bush's decision to surge in Iraq*, eds. Timothy Andrews Sayle, Jeffrey A. Engel, Hal Brands, and William Inboden (Ithaca and London: Cornell University Press, 2019), 10). It was then picked up in White House discourses, being notably reiterated in a speech by President Bush in December 2005 (Office of the Press Secretary, "President Discusses War on Terror and upcoming Iraqi elections") and favoured by Secretary of Defense Rumsfeld who inserted it into the US Government's November 2005 *National Strategy for Victory in Iraq* (Rumsfeld's influence here is noted in Michaels, *The Discourse Trap*, 114. It features throughout the National Strategy for Victory in Iraq, beginning on page 6, under the terminology of 'rejectionists' who "are against a new Iraq in which they are no longer the privileged elite" ("National Strategy for Victory in Iraq," *National Security Council* (Nov., 2005). Available at: https://www.files.ethz.ch/isn/14460/iraq_national_strategy_20051130.pdf, 6).

persuasion, it buttressed the conservative paradigm narrative of IV being irrational, condemnable, and divorced from legitimate grievances.

- 7) The Iraqi insurgency constituted a manifestation of ‘anti-body theory’, which held Middle Eastern cultures to be xenophobic and liable to impulsively reject any foreign presence, no matter how benevolent⁶⁸⁴. Again, although not based on *ideological persuasion* (unless conceived as a cultural ‘vulnerability’), this discourse reinforced claims that anti-coalition violence resulted from irrational impulses divorced from legitimate grievances.
- 8) ‘Extremist’ clerics and madrassas were *ideologically persuading* the populace into fighting coalition forces⁶⁸⁵.
- 9) The Coalition needed to wage a ‘war of ideas’ against the ideology/values of the ‘terrorists’⁶⁸⁶, to be won by feting the superiority of its universal values of “freedom and human dignity” over the ‘terrorists’ values of

⁶⁸⁴ ‘Anti-body theory’ was conceived by US CENTCOM commander General John Abizaid. It was very influential both within military circles as well as in Washington, both because of its political expedience and because of Abizaid’s own perceived credentials, his authority coming from his own Arab Lebanese background, his wealth of direct Middle East experience studying and then serving (with Jordanian special forces) in Jordan in the 1970s during the Palestinian “Black September” conflict there, and serving in Lebanon in the early 1980s, and his having earned a Masters degree in *Middle East Studies* from Harvard. See: Thomas E. Ricks, *Fiasco: The American military adventure in Iraq* (London: Penguin Books, 2006) [Kindle], 183; Frank Sobchak, “The tortured path to strategic failure: US landpower in Iraq, 2003-2011,” in *Landpower in the Long War: Projecting force after 9/11*, ed. Jason W. Warren (Kentucky: University Press of Kentucky, 2019), 90; Dodge, “Iraq, US policy,” 77; Rayburn, et al., *The U.S. Army in the Iraq War: Vol. 1*, 320, 490 & 577; David. E. Johnson, et al., *The U.S. Army and the Battle for Baghdad: Lessons learned – and still to be learned* (Santa Monica, CA: RAND Corporation, 2019), 60; and Max Boot, “The Worst,” *New Republic*, dated March 17 2011. Accessed October 22 2020. Available at: <https://newrepublic.com/article/85259/known-unknown-donald-rumsfeld>

⁶⁸⁵ See speeches: Tony Blair, “A Battle for Global Values,” *Foreign Affairs*, dated January/February 2007. Accessed January 11 2020. Available at: <https://www.foreignaffairs.com/articles/2007-01-01/battle-global-values>; and Office of the Press Secretary, “President Discusses War on Terror at National Endowment”; Office of the Press Secretary, “President Discusses War on Terror and Operation Iraqi Freedom”; Office of the Press Secretary, “President Outlines Steps to Help Iraq Achieve Democracy and Freedom”. The prolific *9/11 Commission Report* also emphasised the role of madrassas, describing them as “incubators for violent extremism,” indoctrinating the children of poor families for whom madrassas offer the only affordable education available. See: Thomas H. Kean (ed.), *The 9/11 Commission Report* (National Commission on Terrorist Attacks Upon the United States, 2004), 367. The role of madrassas seems to have particularly preoccupied Rumsfeld (Bergen & Pandey, “The madrassa scapegoat,” 117).

⁶⁸⁶ First explicitly articulated in: “The National Security Strategy of the United States of America, September 2002,” 6, repeated in the 2003 *National Strategy for combatting terrorism* (cited in: Ryan, *Full Spectrum Dominance*, 37); the 2006 *National Strategy for combatting terrorism* (“National strategy for combatting terrorism, September 2006”) and the 2006 *Quadrennial Defense Review* (cited in: Angel Rabasa, “Where are we in the ‘war of ideas’?” in *The Long Shadow of 9/11: America’s response to terrorism*, eds. Brian Michael Jenkins and John Paul Hodges (Santa Monica, CA: RAND Corporation, 2011), 64).

“oppression and totalitarian rule”⁶⁸⁷; and by conveying to them the backwardness of the terrorists’ values, the absurdity of their attitudes, and the falsity of their claimed grievances⁶⁸⁸.

Any reports challenging this discourse were, initially, suppressed⁶⁸⁹, coupled with politically-motivated censoring of terminology supportive of progressive paradigm-style explanations (notably a long-term embargo on the term ‘insurgency’), which forced commanders to employ cryptic terminology that confused understandings of the enemy’s nature⁶⁹⁰. Moreover, several conservative paradigm-aligned orientalist texts circulated among US military institutions perpetuating stereotypes of Arab irrationality, unprovoked violence, and tendency to blame others for failure (*à la cultural ‘vulnerability’ sub-paradigms*)⁶⁹¹.

These discourses were driven by political and ideological factors:

Politically, Washington’s reification of conservative paradigm themes served domestic and non-domestic strategic imperatives. Domestically, there were three imperatives (both becoming more pressing as domestic support for the war effort began to slump amid mounting Coalition fatalities and political criticisms):

⁶⁸⁷ “National strategy for combatting terrorism, September 2006.”

⁶⁸⁸ Blair, “A Battle for Global Values”.

⁶⁸⁹ Examples of which are provided in: Allawi, *The Occupation*, 187; Michaels, *The Discourse Trap*, 112-114; and Dan Murphy, “Al Qaeda stronger, but is it the major factor in Iraq?” *The Christian Science Monitor*, dated July 12 2007. Accessed January 23 2020. Available at: <https://www.csmonitor.com/2007/0712/p99s04-duts.html>

⁶⁹⁰ In particular, Rumsfeld forbade CENTCOM Commander General Abizaid from using the term “insurgency,” pressuring him to compromise by describing the enemy as employing a “terrorist strategy” and using “terrorist attacks and guerrilla warfare tactics.” See: Rayburn, et al., *The U.S. Army in the Iraq War: Vol. 1*, 178. Similarly, prior to 2004, commanders in Afghanistan were forbidden from referring to their operations as ‘counterinsurgency,’ being instead commanded to use the term “counterterrorism” in keeping with the GWOT’s strategic narrative, see: Lieutenant General David W. Barno, “Fighting ‘the other war’: Counterinsurgency strategy in Afghanistan, 2003-2005,” *Military Review* 88(5) (Sep.-Oct., 2007), 34.

⁶⁹¹ Notably Ralph Patai’s *The Arab Mind* which appeared on readings lists for the CPA, the US Army’s Fort Carson COIN course, Fort Bragg’s Special Warfare School, and Fort Leavenworth’s Command and General Staff College. See: Douglas Little, *American Orientalism: The United States and the Middle East since 1945*, 3rd ed. (Chapel Hill, NC: The University of North Carolina Press, 2008), 335; Kurzman, *The Missing Martyrs*, 197. Among its claims were that Arabs exhibited a peculiar disinclination to accept responsibility (always projecting blame onto others); tendencies towards irrationality; and tendencies towards violence; etc. Quoted or paraphrased in: Ibid; also: Tuastad, “Neo-Orientalism,” 592; Roberto J. González, “Patai and Abu Ghraib,” *Anthropology Today* 23(5) (Oct., 2007): pp. 23-23.

- 1) Preserving the strategic narrative justifying *Operation Iraqi Freedom* as a component of the GWOT's promoting democracy as an antidote to terrorism strategy. This meant maintaining that the Iraqis (and Afghans) were indeed grateful recipients of freedom, with all violence attributable to former-regime sore-losers and ideologically-motivated (and thus unprovoked) Islamic extremists operating against the popular will⁶⁹².
- 2) Evading accusations that the occupying forces' conduct – or the invasion itself – had provoked the violence, by attributing violence to ideological fanatics⁶⁹³.
- 3) Tying both conflicts to the GWOT by depicting the enemy as AQ and its ilk, who needed to be fought abroad to prevent them attacking Western countries at home⁶⁹⁴.

Non-domestically, it was hoped to discredit the insurgents in Iraqi and Afghan eyes by depicting them as former-regime elements and self-serving foreign 'extremists' attempting to exploit and perpetuate the suffering - and inhibit the flourishing - of the people. Indeed, this became part of an expansive US-led propaganda campaign that sought to discredit the insurgency in the eyes of the Iraqi population by portraying it as the work of exploitative foreign extremists, particularly AQ and Abu Musab al-Zarqawi. Dubbed the "Villainize Zarqawi/leverage xenophobia response" in military documents, its logic lay in playing upon the presumed xenophobia of Iraqis, and to associate the insurgency with the "suffering of the Iraqi people" and "denial of Iraqi aspirations"⁶⁹⁵.

Ideologically, Washington was so invested in its MT-driven diagnostic/prognostic framework that it resisted information challenging the

⁶⁹² Allawi, *The Occupation*, 173 & 185; Michaels, *The Discourse Trap*, 111 & 118.

⁶⁹³ Michaels, *The Discourse Trap*, 108.

⁶⁹⁴ "Al-Zarqawi: America's new bogeyman," *al-Jazeera English*, July 1 2004. Accessed July 15 2019. Available at: <https://www.aljazeera.com/archive/2004/07/2008410113750484981.html>; Thomas E. Ricks, "Military Plays Up Role of Zarqawi: Jordanian Painted As Foreign Threat To Iraq's Stability," *Washington Post*, April 10 2006. Accessed July 15 2019. Available at: https://www.washingtonpost.com/archive/politics/2006/04/10/military-plays-up-role-of-zarqawi-span-classbankheadjordanian-painted-as-foreign-threat-to-iraqs-stabilityspan/9dbb8dca-12a1-4a78-9a33-d373d7cccfab/?utm_term=.c58eecd29c5; Michaels, *The Discourse Trap*, 119.

⁶⁹⁵ Ricks, "Military Plays Up Role of Zarqawi". See also: Matt Carr, "The Barbarians of Fallujah," *Race & Class* 50(1) (2008), 27; Michaels, *The Discourse Trap*, 121; Nick Davies, *Flat Earth News: An Award-winning Reporter Exposes Falsehood, Distortion and propaganda in the global media* (London: Vintage, 2009 [2008]), 214; "Al-Zarqawi: America's new bogeyman"; Marc Lynch, "The real problem with 'everybody's al-Qaeda'," *Abu Aardvark*, dated July 2 2007. Accessed January 23 2020. Available at: <https://abuaardvark.typepad.com/abuaardvark/2007/07/the-everybodys-.html>

strategic narrative. Dodge writes that “Until 2006⁶⁹⁶ American policy-making attempted to find solutions to [...] discrepant information coming from Baghdad within existing analytical categories⁶⁹⁷”; an ideological inflexibility Salamé, A UN official serving in Baghdad, attributed to an “ideological-industrial complex”⁶⁹⁸. Meanwhile, commanders on the ground struggled with a moral-psychological imperative for upholding this narrative: Serving soldiers-turned-scholars, Martin⁶⁹⁹ and Caputi⁷⁰⁰, recount how, even as empirical observations prompted questions over conservative paradigm rhetoric, it was psychologically difficult for them to relinquish it, for doing so would negate the *raison d’être* for their sacrifices and the lives they were taking, while clinging to it provided moral certainty, “a grand narrative [...] that helped us to put aside any doubts about the purpose and morality of what we had done [...] that we were in fact the good guys and the people shooting at us were terrorists.”⁷⁰¹ Similarly, Martin recollects that “This dissonance between what we said and what we saw was clear to many who fought the war. But, in a classic case of cognitive dissonance minimisation, we ignored evidence that did not fit our prisms for understanding the war [...] It was impossible to question the explanatory frameworks surrounding the war without removing our own *raison d’être* for being there⁷⁰²”.

Informed by these discourses, empirical observations/intelligence data from Iraq and Afghan battlefields were both attained and interpreted in ways that reified them:

- 1) Intelligence reports in Iraq frequently reported that Iraqis were being indoctrinated or otherwise rallied towards violence by radical

⁶⁹⁶ The year the ‘new’ COIN doctrine (aka the hybrid paradigm) was formulated and released – see below.

⁶⁹⁷ Toby Dodge, “The ideological roots of failure: the application of kinetic neo-liberalism to Iraq,” *International Affairs* 86(6) (2010), 1272.

⁶⁹⁸ Little, *American Orientalism*, 332. Similarly, Chairman of the *National Intelligence Council*, Robert Hutchings, complained that “senior officials simply weren’t ready to pay attention to analysis that didn’t conform to their own optimistic scenarios” (Allawi, *The Occupation*, 187).

⁶⁹⁹ Mike Martin, *Why we fight* (London: C. Hurst & Co. (Publishers), Ltd., 2018) [Kindle].

⁷⁰⁰ Ross Caputi, *et al.*, *The Sacking of Fullajah: A People’s History* (Amherst and Boston: University of Massachusetts Press, 2019).

⁷⁰¹ *Ibid*, 116.

⁷⁰² Martin, *Why we fight*, Location 2731 and 2738. In a more abstract sense, Vietnam War veteran-turned-scholar Marlantes discusses the psychological salve offered by understanding one’s enemy as ideologically-motivated extremists or chauvinists, rather than as rational humans fighting for their own rational cause (Karl Marlantes, *What it is like to go to war* (Bloomsbury: Corvus, 2011), 55).

imams/mosques⁷⁰³, religious radio stations⁷⁰⁴, and within US-run detention centres⁷⁰⁵. Such reports were difficult to interpret causally due to a lack of recognition of the distinction between indoctrination via *ex nihilo ideological persuasion* and *post facto rationalisation*. Thus, it seems the discursively reified *ideological persuasion* dynamic was generally assumed.

- 2) The influx of foreign jihadists, disproportionately reflected in intelligence reports⁷⁰⁶, reified claims that the insurgents were ideologically-motivated extremists, acting opportunistically and divorced from local grievances⁷⁰⁷.

⁷⁰³ In particular, the Iraqi Association of Islamic Scholars, thought to have seized control over 80% of all Sunni mosques in Iraq following Saddam's fall, was reported to have played a key role in indoctrinating Iraqi Sunnis towards violence. See: Anthony H. Cordesman, *Iraq's Evolving Insurgency* (Washington, DC: Center for Strategic and International Studies, 2005). Available at: https://csis-website-prod.s3.amazonaws.com/s3fs-public/legacy_files/files/media/csis/pubs/050805_iraqi_insurgency.pdf, 42; Roel Meijer, "The Association of Muslim Scholars in Iraq," *Middle East Report 237* (Winter, 2005); Allawi, *The Occupation*, 183. More broadly, US military intelligence officials reportedly attributed most insurgent activity to the exhortations of radical sheikhs and imams, as well as nationalism. See: Michaels, *The Discourse Trap*, 113.

⁷⁰⁴ Rayburn, et al., *The U.S. Army in the Iraq War. Vol. 1*, 155.

⁷⁰⁵ A number of US commanders, including General Petraeus (chief architect of the 'new' COIN doctrine outlined below), referred to US detention centres as "terrorist universities," where 'extremists' kept in close and under-supervised confinement with 'non-extremists' were able to indoctrinate them in large numbers. See: David Petraeus, "Forward," in Peter R. Mansoor, *Surge: My Journey with General David Petraeus and the Remaking of the Iraq War* (New Haven and London: Yale University Press, 2013), xviii; Lieutenant Commander Vasilios Tasikas, "The Battlefield inside the Wire: Detention Operations Under Major General Douglas Stone," *Military Review* 86(5) (Sep.-Oct., 2009), 65; Peter Mansoor, "Army," in *Understanding Counterinsurgency Warfare: Doctrine, Operations, and Challenges*, eds. Thomas Rid and Thomas Keaney (Oxon: Routledge, 2010), 84-85; Tom Shanker, "Abu Ghraib called incubator for terrorists," *The New York Times*, dated February 15 2006. Accessed January 15 2020. Available at: <https://www.nytimes.com/2006/02/15/world/middleeast/abu-ghraib-called-incubator-for-terrorists.html>

⁷⁰⁶ Foreign fighters were disproportionately reflected in military intelligence reports for two main reasons: firstly, this was due to the brutality of acts which perpetuated their notoriety (Michael Fitzsimmons, *Governance, identity, and counterinsurgency: Evidence from Ramadi and Tal Afar* (Carlisle, PA: Strategic Studies Institute and U.S. Army War College Press, 2013), 81). Secondly, US military intelligence practices often focussed on monitoring communications such as emails, phone-taps, etc; mediums relied upon by foreign fighters but largely circumvented by indigenous insurgents communicating in person (Ricks, *Fiasco*, 194). For more on the disproportionate awareness of foreign fighters vis-à-vis indigenous ones, see: Rayburn, et al., *The U.S. Army in the Iraq War: Vol. 1*, 125; Nance, *The Terrorists of Iraq*, 13 & 212.

⁷⁰⁷ Tan argues that "the conflation of terrorism with insurgency became inevitable after global terrorism became conflated with the Iraq insurgency. The Iraq imbroglio, involving counterinsurgency operations to stem the armed opposition to the U.S. presence, inevitably became linked to the GWOT. The main jihadist group there responsible for many terrorist attacks in Iraq pledged allegiance to Al Qaeda [...] Iraq also captured the imagination of those who want to defend an Islam under attack, just as Afghanistan did previously in the 1980s, and has become a central battlefield of the global jihad, attracting foreign mujahideen to fight in Iraq." See: Tan, *U.S. Strategy*, 136.

- 3) Likewise, former-regime loyalists were disproportionately reflected in early military intelligence reports in Iraq⁷⁰⁸, reifying discursive claims.
- 4) The brutality of much insurgent behaviour shocked and repulsed Coalition troops, reifying claims that the enemy were hateful, irrational killers, for no rational hedger could act in such a way⁷⁰⁹.
- 5) Iraq's sectarian violence puzzled Coalition troops. While White House discourse explained it along progressive paradigm-leaning lines (as product of temporally-bounded mutual fears – manufactured by Saddam's divide-and-rule and Zarqawi's civil-war baiting – rather than opposing religious chauvinisms⁷¹⁰), some commanders were influenced by orientalist post-9/11 media trends depicting the violence as a resurgence of irrational, 'ancient hatreds', rooted in a chauvinistic 1,400-year doctrinal grudge-match suppressed under Saddam's iron rule⁷¹¹.
- 6) In Afghanistan, the enemy's very name ('Taliban', meaning 'seminary students') seemed to suggest a movement of ideologically-indoctrinated madrassa graduates⁷¹².
- 7) Impressive electoral turnouts in Iraq and Afghanistan seemed to vindicate rhetoric that most of the populations welcomed their new freedoms⁷¹³, the exceptions easily dismissed as 'sore losers' or *ideologically persuaded* 'extremists' resisting freedom on ideological principle/totalitarian impulse.

⁷⁰⁸ Rayburn, et al., *The U.S. Army in the Iraq War: Vol. 1*, 169 & 396.

⁷⁰⁹ This was reflected in the statements of Colonel McMaster commanding US troops in Tal Afar. Commenting on the brutality of the insurgents, he attributed it to the foreign elements, dubbing them "the worst of the worst...people in the world" – quoted in: Fitzsimmons, *Governance*, 81.

⁷¹⁰ See, for example: Office of the Press Secretary, "President Bush Participates in Joint Press Availability with Prime Minister Maliki"; Office of the Press Secretary, "President Discusses Democracy in Iraq with Freedom House". Also discussed in: Anthony R. DiMaggio, *Selling war, selling hope: Presidential rhetoric, the news media, and U.S. foreign policy since 9/11* (Albany: State University of New York Press, 2015), 139-141.

⁷¹¹ As critiqued in: Ussama Makdisi, "Pensée 4: Moving Beyond Orientalist Fantasy, Sectarian Polemic, and Nationalist Denial," *International Journal of Middle East Studies (Quick Studies)* 40 (2008), 560; Dodge, "Enemy Images," 462; Tim Jacoby & Nassima Neggaz, "Sectarianism in Iraq: the role of the coalition provisional authority," *Critical Studies on Terrorism* 11(3) (2018), 479-481. CENTCOM commander Abizaid was particularly concerned by the "sectarian nature of Iraqi society" (Rayburn, et al., *The U.S. Army in the Iraq War, Vol. 1*, 198) while Petraeus and his colleagues struggled to understanding the nature of Iraq's sectarian conflict, eventually settling on the European *Wars of Religion* as a comparator (an analogy which, unhelpfully, they also did little to explicate from a causal perspective) – see: Peter R. Mansoor, *Surge: My Journey with General David Petraeus and the Remaking of the Iraq War* (New Haven and London: Yale University Press, 2013), 43.

⁷¹² Kurzman, *The Missing Martyrs*, 77.

⁷¹³ General Casey commanding Coalition forces in Iraq is noted to have been particularly encouraged by this. See: Rayburn, et al., *The U.S. Army in the Iraq War: Vol. 1*, 529.

- 8) Finally, overstretch and teething problems in intelligence operations early in the Iraq campaign⁷¹⁴ likely rendered the military more impressionable to official discourse (for lack of contradictory evidence). Moreover, intelligence often encouraged confirmation bias because those discourses prompted them to investigate former-regime loyalists or foreign fighters (while ignoring indigenous, popular insurgents), meaning that only those elements showed up in the emerging intelligence picture⁷¹⁵.

3.2.2.2. *Reification of progressive paradigm narratives:*

Simultaneously, however, other discourses and empirical observations seemed to reify progressive counterinsurgent iteration sub-paradigms, particularly the exploitation sub-paradigm.

As notes, official GWOT narratives incorporated some progressive paradigm themes into their largely conservative paradigm framework:

- 1) *Extremists feed on misery and frustration:* official rhetoric repeatedly asserted that ‘terrorists’ exploit poverty, corruption, pre-existing conflicts and tensions, etc., to justify their actions, recruit the alienated and/or destitute, either through financial incentives or through “[building] a culture of victimisation, in which someone else is always to blame and violence is always the solution.⁷¹⁶”
- 2) *Extremism is nurtured by tyranny:* ‘terrorists’ recruit from “populations who have no voice in their own government and see no legitimate way to promote change⁷¹⁷”, thus pushing them, often reluctantly, into the arms of movements who offer alternative means of promoting it.
- 3) *Extremists claim to offer justice for the aggrieved and portray themselves as solutions to the population’s woes:* ‘terrorists’ promise “a future of

⁷¹⁴ These teething issues and resource-overstretch are discussed at length in Ricks, *Fiasco*, 193-122.

⁷¹⁵ Notably, Michaels notes that, immediately following the collapse of Saddam’s regime, US intelligence gathering efforts focussed almost entirely on rounding up former-regime hardliners, see: Michaels, *The Discourse Trap*, 111.

⁷¹⁶ Office of the Press Secretary, “President Discusses War on Terror at National Endowment”. See also: Office of the Press Secretary, “President Discusses War on Terror and Operation Iraqi Freedom”; and “National Strategy for Combatting Terrorism ... 2003,” 6 & 22-23; Office of the Press Secretary, “President Bush Discusses Progress in Afghanistan”.

⁷¹⁷ “National strategy for combatting terrorism, September 2006”; see also: “State of the Union Address 2004”; Blair, “A Battle for Global Values”.

justice and holiness [...] [while really] preparing for a future of oppression and misery⁷¹⁸.

- 4) *Freedom, hope, and economic opportunity are essential antidotes to extremism*: by denying opportunities for ‘terrorists’ to exploit despair, by providing tangible evidence that the government is better able to cater for their material wellbeing, and by showing the population that they all have a place, security, prosperity and equal opportunity to flourish under a democratic system⁷¹⁹.

Meanwhile, intelligence reports increasingly suggested that most insurgents were motivated by extant grievances and/or immediate material concerns, notably grievances over heavy-handed Coalition tactics; sectarian predations; inadequate essential service and security provision; socioeconomic malaise and mass unemployment; or else had been induced into supporting the insurgents through financial incentives, or coerced through intimidation⁷²⁰.

3.2.2.3. *Inconsistent empirical findings*:

Further confusion was caused by irregularities in emergent empirical studies on Iraqi and Afghan insurgents. Such studies diverged significantly, concluding variously that the insurgents were ideologically-motivated⁷²¹ (*à la* conservative

⁷¹⁸ Office of the Press Secretary, “President Discusses War on Terror at National Endowment”.

⁷¹⁹ Office of the Press Secretary, “President Bush Discusses Progress in Afghanistan”; Office of the Press Secretary, “President Bush Visits with Troops in Afghanistan”; Office of the Press Secretary, “President Discusses War on Terror at National Endowment”; Office of the Press Secretary, “President Discusses Democracy in Iraq with Freedom House”; Office of the Press Secretary, “President Discusses War on Terror and Operation Iraqi Freedom”; Office of the Press Secretary, “President Discusses War on Terror and upcoming Iraqi elections”; Office of the Press Secretary, “President Bush Discusses Global War on Terror”; “National strategy for combatting terrorism, September 2006,”; “Full text: Tony Blair’s speech”.

⁷²⁰ Detailed in: Allawi, *The Occupation*, 187; Amatzia Baram, “Who Are the Insurgents? Sunni Arab Rebels in Iraq,” *United States Institute of Peace* (Apr., 2005), 2; Lionel Beehner, “IRAQ: Insurgency Goals,” *Council on Foreign Relations*, dated May 20 2005. Accessed January 3 2020. Available at: <https://www.cfr.org/background/iraq-insurgency-goals>; Cordesman, *Iraq’s Evolving Insurgency*, 43; Michaels, *The Discourse Trap*, 114; Mackubin Thomas Owens, “Counterinsurgency from the bottom-up: Colonel H.R. McMaster and the 3rd Armoured Cavalry Regiment in Tel Afar, Spring-Fall 2005,” *Foreign Policy Research Institute*, dated March 17 2017. Accessed October 23 2020. Available at: <https://www.fpri.org/article/2017/03/counterinsurgency-bottom-colonel-h-r-mcmaster-3rd-armored-cavalry-regiment-tel-afar-spring-fall-2005/>; Rayburn, et al., *The U.S. Army in the Iraq War: Vol. 1*, 178, 450; Tasikas, “The Battlefield inside the Wire,” 66.

⁷²¹ Admittedly many such studies emerged following the release of the ‘new’ COIN doctrine, but have served sustain the confusion that fuelled it, carrying it into future COIN doctrine iterations. See for example: Marisa L. Porges, “Radicalization Processes in Afghanistan,” *CTC Sentinel* 5(1) (Jan., 2012), 13-14; Shehzad H. Qazi, “Review: The ‘Neo-Taliban’ and Counterinsurgency in Afghanistan,” *Third World Quarterly* 31(3) (2010), 487-489; Ghulamreza Fazlinaiem and Nick Miszak, “Mullah Omar Wants You! Taliban Mobilization Strategies or Motivations for Joining the Insurgency,” *Middle East Institute*, dated April 19 2012. Accessed January 3 2020. Available at:

paradigm), materially-motivated⁷²² (*à la* progressive paradigm), or a mix of both (insurgents stratified into an ideologically-motivated ‘extremist’ core and a materially-motivated ‘hedging’ majority)⁷²³. As I surmise in chapter 4, much of this confusion stemmed from the lack of consistent and consensual concept definition and operationalisation discussed in the previous two chapters (particularly a failure of explicate the meaning of ‘ideological motivation’, specifically whether it results from *ideological persuasion* or *post facto rationalisation*). One such study on the Iraqi insurgency provides a particularly instructive example: after asserting ‘Iraqi nationalism’ to be a primary motivator of the insurgency (which the conservative paradigm would understand as blind xenophobic national chauvinism), the author goes on to qualify that this nationalism was a response to such grievances as failed post-war reconstruction, insecurity, arbitrary arrests by the occupying forces and the Abu Ghraib torture scandal⁷²⁴. Conversely, one study on the motivations of Afghan insurgents asserted a “lack of ideological motives,” but attributed motivation instead to “fear for their cultural and religious integrity”⁷²⁵ - a motivation many would consider explicitly ideological (in that their concerns were of an abstract rather than material nature), depending on how they had operationalised the concept.

3.2.2.4. *Confusion as to the nature of the conflict:*

All this conflicting information was wrapped up in persistent confusion as to the nature of the war being fought. Neither Washington nor the military’s higher echelons established an explicit, consistent designation describing the Iraq

<https://www.mei.edu/publications/mullah-omar-wants-you-taliban-mobilization-strategies-or-motivations-joining>

⁷²² Sultan Barakat & Steven A. Zyck, “Afghanistan’s Insurgency and the Viability of a Political Settlement,” *Studies in Conflict & Terrorism* 33(3) (2010), 196; Bryan Bender, “Taliban not main Afghan enemy,” *The Boston Globe*, dated October 9 2009. Accessed January 10 2020. Available at:

http://archive.boston.com/news/world/middleeast/articles/2009/10/09/most_insurgents_in_afghanistan_not_religiously_motivated_military_reports_say/?page=1

⁷²³ Baram, “Who Are the Insurgents?”; Guido Steinberg, “The Iraqi Insurgency: Actors, Strategies, and Structures,” *SWP Research Paper* (Dec., 2006); Michael Eisenstadt and Jeffrey White, “Assessing Iraq’s Sunni Arab Insurgency,” *Military Review* (May–June 2006): pp. 33–49; Andrew Garfield and Alicia Boyd, “Understanding Afghan Insurgents: Motivations, Goals, and the Reconciliation and Reintegration Process,” *Foreign Policy Research Institute* (Apr., 2013); Dorronsoro, “The Taliban’s winning strategy”; Antonio Giustozzi, “The Taliban Beyond the Pashtuns,” *The Centre for International Governance Innovation, The Afghanistan Papers* 5 (Jul., 2010); Waldman, “Dangerous Liaisons”.

⁷²⁴ Steinberg, “The Iraqi Insurgency,” 25.

⁷²⁵ Barakat & Zyck, “Afghanistan’s Insurgency,” 196-199.

conflict's nature⁷²⁶ (while neglected Afghanistan was lazily dismissed as simple counterterrorism⁷²⁷). Meanwhile, commanders on the ground struggled to define the conflicts for their own purposes, often identifying multiple overlapping conflicts (in Iraq: inter-ethno-sectarian, intra-ethno-sectarian, terrorist, criminal, regional proxy, and anti-coalition insurgency) which all seemed to be fuelled by different dynamics requiring different solutions⁷²⁸.

Meanwhile, the lack of clear, consistent doctrine left commanders to interpret empirical observations idiosyncratically. For example, the oft-observed trend of imams stoking violence might be interpreted as *ideological persuasion*⁷²⁹ or *post facto rationalisation*⁷³⁰. Commanders' interpretations would be determined by their own independent reading (e.g., 'classical' COIN doctrine vs. orientalist texts) and the degree to which they were personally influenced by different elements of conflicting official discourses.

3.2.2.5. *Indications of a stratified IV imaginary:*

As these diverging inputs influenced perceptions on the ground, intelligence reports increasingly proffered a stratified IV imaginary of the kind that would become formalised under the hybrid paradigm. It was increasingly perceived that some perpetrators were *ideologically persuaded* 'extremists' acting chauvinistically and irrespectively of any grievances (*à la* conservative paradigm),

⁷²⁶ Indeed, Michaels argues that "the inability or unwillingness within the bureaucracy to clearly and consistently identify the adversary was one of the primary impediments to the development of an effective strategy [...] [and that] there was never a clear and consistent characterization of the irregular adversary, no collective noun [...] [engendering] general lack of understanding of whom US officials believed they were fighting." (Michaels, *The Discourse Trap*, 107-108). Ricks makes the same argument in Ricks, 228.

⁷²⁷ While Lieutenant General Barno – who took command of US troops in Afghanistan in October 2003 – strenuously argued for the need to implement a COIN strategy (which he understood through reference to 'classical' COIN doctrine), he was not provided sufficient troops to do so as, prior to 2006, the US viewed Afghanistan as a purely peacekeeping and counterterrorism operation. See: Barno, "Fighting 'the other war'"; Jackson, "US Strategy," 78, 81, 83 & 89; Indurthy, "The Obama Administration's strategy," 10; Innes-Robbins, *Dirty Wars*, Location 5226.

⁷²⁸ Indeed, Celeste Ward Gventer – who was on the ground in Iraq in 2006 – recalls her sense of dissonance and futility when told by the incoming Petraeus to conceptualise the war as an insurgency: "many of us saw multiple (at least six) overlapping conflicts occurring at once [...] The term 'insurgency' [...] seemed to us, at best, inapt." See: Gventer, "Keep the change," 243-244. See also: Nicholas J. Schlosser, *The Surge 2007-2008* (Washington, DC: Center of Military History United States Army, 2017), 24; Nick Shifrin, "Campaign Analysis: The 'Surge' in Iraq, 2007-2008," *Orbis* 62(4) (2018), 619.

⁷²⁹ E.g., Imams were telling their congregations that it was their religious duty to fight 'infidel' occupying forces, *à la obediently violent* sub-paradigm.

⁷³⁰ E.g., Imams offering themselves as leaders for congregations already intent on revolt, or Imams rationalising the grievances of their congregations by convincing them that responsibility for those grievances lay with the actions of coalition forces, and the solution lay in ejecting those coalition forces, etc.

while others supported the insurgents out of *post facto rationalisation* or non-ideological reasons – driven by socioeconomic deprivation or other grievances (à la progressive paradigm). For example, one 2006 US/NATO/Afghan intelligence report divided the Taliban insurgency into four insurgent types: “Hard-core leaders with links to al-Qaida (driven by ideology); fighters recruited in Pakistani madrasas (driven by ideology); unemployed youth (driven by money); and disaffected tribes [driven by alienation from/specific local grievances with Afghan government]”⁷³¹.

3.2.2.6. *The concerted search for a unifying paradigm:*

This conflicting information and uncertainty in its interpretation produced a crisis of confidence in the applicability of ‘classical’ COIN doctrine, raising several questions:

- 1) How could ‘classical’ COIN’s ethos on resolving the underlying legitimacy crisis help combat an insurgency motivated not by a legitimacy crisis (most of the population apparently supporting the democratic transitions) but by ideological chauvinism that brooked no compromise?⁷³²
- 2) How could ‘classical’ COIN’s concept of ‘competitive state-building’⁷³³ explain popular support for insurgents bent on destroying the very thing the populace wanted (freedom/democracy)?⁷³⁴
- 3) How could ‘classical’ COIN’s ethos on pacifying insurgents through rational, material inducements hope to pacify insurgents apparently uninterested in material gain, inimical to compromise, and bent on chauvinistic slaughter?⁷³⁵

⁷³¹ Paraphrased in: Anne Stenersen, *The Taliban insurgency in Afghanistan – organization, leadership and worldview* (Kjeller: Norwegian Defence Research Establishment, 2010), 22.

⁷³² Martin, *Why we fight*, Location 2715; Fred Kaplan, *The Insurgents: David Petraeus and the plot to change the American way of war* (New York: Simon & Schuster, 2013) [Kindle], 217-219; David J. Kilcullen, “Countering global insurgency,” *Journal of Strategic Studies* 28(4) (2005), 606; David W. Barno, “Challenges in Fighting a Global Insurgency,” *US Army War College Quarterly: Parameters* 26(2) (Summer 2006), 27-29; Warren Chin, “Why Did It All Go Wrong? Reassessing British Counterinsurgency in Iraq,” *Strategic Studies Quarterly* 2(4) (Winter 2008), 122; Chin, “From Belfast to Lashkar Gar,” 278; John Mackinlay, “Is UK Doctrine Relevant to Global Insurgency?” *The RUSI Journal* 152(2) (2007), 34; Dixon, “Beyond Hearts and Minds,” 70-78.

⁷³³ i.e., insurgents and counterinsurgents competing to win popular support through material appeals based around provision of services, security, and prosperity.

⁷³⁴ David Kilcullen, “Counter-insurgency Redux,” *Survival* 48(4) (2006), 116; Martin, *Why we fight*, Location 41.

⁷³⁵ Ibid, 116; Fitzsimmons, “Hard Hearts and Open Minds?” 360.

At the same time, however, ‘classical’ COIN still appeared a necessary bedrock for combatting an insurgency thought to be exploiting deprivation, frustration, and instability to garner support. Moreover, ‘classical’ COIN doctrine was the closest framework available for conceptualising and addressing the situation at hand.

Faced with this conundrum, in 2006 military practitioners and academics convened, under US General Petraeus, to craft a ‘new’ COIN doctrine⁷³⁶ “merg[ing] traditional approaches to COIN with the realities of a new international arena shaped by [...] extremist ideologies⁷³⁷”. The ‘hybrid paradigm’ they produced came to be embodied in the December 2006 US COIN manual (*FM 3-24/MCWP 3-33.5 Counterinsurgency – hereafter FM 3-24*)⁷³⁸; the Iraqi ‘Surge’ campaign (Jan., 2007-Jun., 2008)⁷³⁹; and the COIN guide issued following it (Jul., 2008)⁷⁴⁰; – a collaborative effort but all of which spearheaded/coordinated by Petraeus⁷⁴¹. Combined, they provided the template for a series of largely identikit subsequent COIN doctrine updates/emulations⁷⁴².

⁷³⁶ While the first draft of the new doctrine manual was assigned to two military scholars (US Army War College historian Conrad Crane and Lt. Colonel John Nagl – the latter of whom had both recent experience in Iraq and had authored a book on COIN in Vietnam and Malaya (John A. Nagl, *Learning to Eat Soup with a Knife: Counterinsurgency Lessons from Malaya and Vietnam* (Westport CT: Praeger, 2002)), they convened a team of twelve subject-matter-experts to advise on individual chapters. Furthermore, Petraeus then convened a workshop of over 100 attendees to critique it. This included a broad spread of academic, Army War College, and think-tank scholars, CIA officials, Special Forces commanders and journalists (Linda Robinson, *Tell me how this ends: General David Petraeus and the search for a way out of Iraq* (New York: Public Affairs, 2008) [Kindle], Locations 1395-1419). Reflecting on this, Clemis asserts that the construction of the ‘new’ COIN doctrine constituted “a unity of effort between the military and academic worlds rarely seen” (Clemis, “Crafting non-kinetic warfare,” 160).

⁷³⁷ Headquarters, U.S. Army Training and Doctrine Command, *FM 3-24*, vii.

⁷³⁸ Headquarters, U.S. Army Training and Doctrine Command, *FM 3-24*.

⁷³⁹ See below.

⁷⁴⁰ “Multi-National Force–Iraq Commander’s Counterinsurgency Guidance Headquarters Multi-National Force–Iraq Baghdad, Iraq APO AE 09342-1400, 15 July 2008,” available as “Appendix 2,” in Peter R. Mansoor, *Surge: My journey with General David Petraeus and the remaking of the Iraq War* (New Haven and London: Yale University Press, 2013).

⁷⁴¹ While the *FM 3-24* was a joint venture involving over 100 people (see footnote 734 above), the project was led by Petraeus, who had final say over the editorial process in which he involved himself intimately (Robinson, *Tell me how this ends*, Location 1419). Similarly, the Surge strategy was not initially conceived by Petraeus (actually being simultaneously conceived and advocated by various parties, notably Frederick Kagan, Colonel H.R. McMaster, and retired Army Vice Chief of Staff, General John M. Keane). However, Petraeus was appointed to formulate-in-detail and lead the strategy, which he did by building it around *FM 3-34*. See: Tan, *U.S. Strategy*, 58-59; Colonel Joel. D. Rayburn, et al., *The U.S. Army in the Iraq War: Vol. 2: Surge and Withdrawal, 2007-2011* (Carlisle Barracks, PA: United States Army War College Press, 2019), 17-18; Schlosser, *The Surge*, 15-16.

⁷⁴² The significant influence of *FM 3-24* – augmented with lessons from the Iraqi Surge campaign - can be immediately recognised in a number of subsequent COIN manuals: notably the 2009 British, 2014 US, and 2016 NATO COIN manuals (Chief of the General Staff, *British Army Field Manual. Vol. 1, Part 10: Countering Insurgency*; Headquarters, Department of the Army, *FM 3-24*; and NATO, *Allied Joint Doctrine for Counter Insurgency*, ed. A, version 1 (NATO

As will become apparent, this ‘new’ COIN amalgamated the conservative and progressive paradigm narratives, theories, and constructs reified throughout the early GWOT. It was informed by conceptual and empirical inputs:

Conceptually, ‘classical’ COIN underpinned the ‘new’ COIN, notably drawing on a 1964 study by French COIN veteran Galula – *Counterinsurgency* – which, while largely obscure at the time, was seized upon for its helpful synthesis of ‘classical’ COIN doctrines into an accessible mantra of COIN as “competitive state-building” and a dialectical battle of perceptions in which insurgents and counterinsurgents competed for legitimacy - through (largely) material appeals – in the eyes of an essentially neutral, rational, ‘hedging’ population. Also referenced was the work of Mao – upon which most ‘classical’ COIN doctrine had been, reactively, built (as noted in chapter 2) – alongside key ‘classical’ era works by Calwell, Kitson, and Thompson⁷⁴³, etc. (FM 3-24 was also heavenly influenced by the contemporary work of former soldier-turned-anthropologist David Kilcullen - whose profound influence is explicated through this section⁷⁴⁴). However, these progressive paradigm underpinnings were caveated by an explicit conviction that amendments were necessary to account for the ‘new kind’ of ideologically-motivated, ‘extremist’ insurgent encountered in Iraq: those “terrorists intoxicated with religious visions” against whom ‘classical’ COIN-style materialist appeals could expect to do little, given their lack of earthly, negotiable objectives⁷⁴⁵. In this regard, the GWOT’s IV imaginary was

Standardization Office, 2016). Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/625810/doctrine_nato_coin_ajp_3_4_4.pdf, respectively). Moreover, FM 3-24 was adopted – in its original form – by militaries all over the world (Farrell & Gordon, “COIN Machine,” 18).

⁷⁴³ Headquarters, U.S. Army Training and Doctrine Command, *FM 3-24*. Helpful discussions on the influences behind FM 3-24 can be found in: Dodge, “Iraq, US policy,” 81; Douglas Porch, “David Galula and the revival of COIN in the US military,” in *The New Counter-insurgency Era in Critical Perspective*, eds. Celeste Ward Gventer, Robert S. Strauss, David Martin Jones, and M.L.R. Smith (Basingstoke: Palgrave Macmillan, 2014), 173; and Fitzgerald, *Learning to Forget*, 170.

⁷⁴⁴ Indeed, Kilcullen stands as the most-cited author in FM 3-24 - as noted in Andrew Mumford, “Warrior-Scholarship in the age of globalised insurgency: the work of David Kilcullen,” in *The Theory and Practice of irregular warfare: warrior-scholarship in counter-insurgency*, eds. Andrew Mumford and Bruno C. Reis (Oxon: Routledge, 2014), 138.

⁷⁴⁵ This point was rammed home in a number of critiques of early drafts of FM 3-24, particularly the charge levelled by retired US Army Lt. Colonel Ralph Peters (and mirrored by Bing West) that the early drafts ignored “religious belief as a motivation” and that ‘classical’ COIN doctrine’s ‘hearts and minds’ approach of rational, materialist appeals could do little to sway “terrorists intoxicated with religious visions” (Kaplan, *The Insurgents*, 217). In more sober terms, Kilcullen – who played a pivotal role in both the formulation of FM 3-24 and the Surge campaign - cautioned in an article of that year – referenced in FM 3-24 - that ‘classical’ COIN doctrine “assumes the insurgent has real-world objectives [...] [when] the religious ideology of some modern insurgents

maintained, with FM 3-24 asserting that “religious extremist insurgents, [...] hold an all-encompassing worldview; they are ideologically rigid and uncompromising, seeking to control their members’ private thought, expression, and behavior. [...] often brand those they consider insufficiently orthodox as enemies. [they employ] unlimited means [...] to achieve their often-unlimited goals⁷⁴⁶”.

Empirically, it drew upon four successful COIN operations already conducted in Iraq: Mosul (2003-2004)⁷⁴⁷; al-Qa’im (2005-2006)⁷⁴⁸; Tal Afar (2005-2006)⁷⁴⁹; and Ramadi (2006)⁷⁵⁰ – the latter occurring too late to influence FM 3-24 but significantly influencing the ‘Surge’. The strategies for these operations were conceived in a bottom-up fashion - absent official doctrine,

creates a different dynamic” (Kilcullen, “Counter-insurgency Redux,” 116). To this end, FM 3-24 explicitly frames its objective as being to “merge traditional approaches to COIN with the realities of a new international arena shaped by technological advances, globalization, and the spread of extremist ideologies” while asserting that “recently, “ideologies based on extremist forms of religious or ethnic identities have replaced ideologies based on secular revolutionary ideals.” (Headquarters, U.S. Army Training and Doctrine Command, *FM 3-24*, viii, 1:4). This assertion was also levelled by key figures influencing the 2009 British COIN doctrine review, notably former British Army officer-turned-lecturer John Mackinlay, whose criticisms of British COIN for being “stuck in the 1960s” and needing to “recognise the importance of ideology [...] characterised by the absolute and intense nature of the faith of its followers [...] [which] does not lend itself to being translated to a series of negotiable objectives” (John Mackinlay, “Defeating Complex Insurgency,” *The Cornwallis Group X: Analysis for new and emerging societal conflicts* (2005), 53; see also: Mackinlay, “Is UK Doctrine Relevant,” 34) did much to provoke internal debates within the Ministry of Defence (as noted in Hazel, “British Counter-Insurgency Doctrine,” 163).

⁷⁴⁶ Headquarters, U.S. Army Training and Doctrine Command, *FM 3-24*, 1:15. This description encapsulates a number of tropes pertinent to the GWOT Islamist IV imaginary, notably that Islamist IV perpetrators are totalitarian, motivated by religious chauvinism, and inimical to reason or compromise.

⁷⁴⁷ Conducted by the US *101st Airborne Division* under the command of then-Major General David Petraeus between April 2003 and January 2004. Lessons from Petraeus’ own COIN campaign in Mosul were first explicated in a Jan.-Feb., 2006 *Military Review* article, written by Petraeus (Lt. General David Petraeus, “Learning Counterinsurgency: Observations from soldiering in Iraq,” *Military Review* 86(1) (Jan.-Feb., 2006): pp. 2-12) in which he explicated fourteen observations from the tour, all of which were included in FM 3-24 (as noted in Conrad Crane, “United States,” in *Understanding Counterinsurgency Warfare: Doctrine, Operations, and Challenges*, eds. Thomas Rid and Thomas Keaney (Oxon: Routledge, 2010), 61).

⁷⁴⁸ Conducted initially by the USMC’s *Regimental Combat Team 2* under command of Colonel Stephen Davis and then the US *3rd battalion, 6th Marines* under Lt. Colonel Dale Alford between May 2005 to March 2006.

⁷⁴⁹ Conducted by the US *3rd Armoured Cavalry Regiment* under the command of Colonel H.R. McMaster between May 2005 and May 2006. McMaster’s COIN campaign in Tal Afar was afforded a dedicated 1 ½-page vignette in FM-24 (Headquarters, U.S. Army Training and Doctrine Command, *FM 3-24*, 5:22-5:23).

⁷⁵⁰ Conducted by the US *1st Armoured Division’s ‘Ready First Combat Team’* under the command of Colonel Sean MacFarland between May 2006 and January 2007. Upon taking command of Multi-National Force – Iraq [MNF-I] in February 2007 to launch the ‘Surge’ campaign, Petraeus, hugely impressed by MacFarland’s achievements in Ramadi, sought out a briefing from him so as to better inform his own strategy (Mansoor, *Surge*, 133-136). Similarly, Petraeus employed McMaster in a key advisory role throughout the Surge campaign (Robinson, *Tell me how this ends*, Location 1740).

guidance, or oversight⁷⁵¹ - by unit commanders influenced by 'classical' COIN⁷⁵². They were distinguishable from coterminous, unsuccessful COIN operations by their re-orientation away from 'enemy-centric', kinetic 'terrorist-hunting' strategies to 'population-centric' COIN strategies (in which the rationally 'hedging' population was considered the insurgency's centre-of-gravity, à la 'classical' COIN).

The 'new' COIN doctrine derived from these two inputs centred around two new sub-paradigms, both expressive of this new 'hybrid' paradigm:

3.2.2.7. *The global insurgency sub-paradigm*⁷⁵³:

This sub-paradigm envisioned a stratified IV imaginary, distinguishing *global insurgents* (conceptualised à la conservative paradigm/GWOT IV imaginary) from *local insurgents* (conceptualised à la progressive paradigm/'classical' COIN).

⁷⁵¹ In his reflections on the construction of the 'new' COIN, then-Lt. Colonel Peter Mansoor, who had played key roles in the formulation of FM 3-24, the conception of the 'Surge' strategy, and as executive officer to General Petraeus during the 'Surge' itself, notes that, during this period, "The lack of coherent campaign plan left division and brigade combat team commanders to fashion their own solutions" (Peter Mansoor, "Army," 79), an observation shared by numerous soldiers and scholars (notably Rayburn, et al., *The U.S. Army in the Iraq War: Vol. 1*, 445; and Ricks, *Fiasco*, 225-227). Only after the successful campaigns in Mosul, al-Qa'im and Tal Afar were underway (or long since over in the case of Mosul) did MNF-I issue a campaign plan (April 2005) explicitly calling for a turn towards COIN - under the new command of General Casey (June 2004) who, working largely from scratch, established in December 2005 a "COIN Academy" at Camp Taji, instructing all incoming commanders from a working curriculum drawing upon 'classical' COIN doctrine and lectures from both Alford (of al-Qa'im fame) and McMaster (of Tal Afar fame) – see: Fitzgerald, *Learning to Forget*, 142-143; Rayburn, et al., *The U.S. Army in the Iraq War: Vol. 1*, 445-446 & 456-457.

⁷⁵² Petraeus' strategy in Mosul was informed by a combination of his experiences of peacekeeping/peacebuilding/nation-building deployments in Central America, Bosnia and Haiti, coupled with his academic background in 'classical' COIN doctrine (having earned a PhD in IR from Princeton studying US military thinking during the Vietnam War (Ricks, *Fiasco*, 228; Ryan, *Full Spectrum Dominance*, 10; Robinson, *Tell me how this ends*, Location 1231). Alford's strategy in al-Qa'im was similarly informed by his studies of 'classical' COIN doctrine (Rayburn, et al., *The U.S. Army in the Iraq War: Vol. 1*, 455), with a particular ethos on the USMC's Vietnam War-era effective but under resourced 'Strategic Hamlets' initiative (William Knarr, "Al-Sahawa: An Awakening in al Qaim," *Combatting Terrorism Exchange* 3(2) (May, 2013), 15). McMaster – like Petraeus – also had an academic background in 'classical' COIN doctrine, having authored a book on the conduct of the Vietnam War (Rayburn, et al., *The U.S. Army in the Iraq War: Vol. 1*, 448) and built his strategy for Tal Afar upon the same 'classical' COIN-era work of David Galula that was so influential in the formulation of FM 3-24. Finally, MacFarland built his Ramadi campaign on the lessons of McMaster's Tal Afar campaign, his '*Combat Ready Brigade*' having briefly relieved McMaster in Tal Afar at the end of the latter's tour in May 2006 (Mansoor, *Surge*, 128).

⁷⁵³ There is some contention as to the origins of this construct. While the RAND Corporation claims credit for its development (David C. Gompert, et al., *War by other means: Building complete and balanced capabilities for counterinsurgency* (Santa Monica, CA: RAND Corporation, 2008), 4: fn. 8), others credit John Mackinlay (David Martin Jones & M. L.R. Smith, "Whose Hearts and Whose Minds? The Curious Case of Global Counter-Insurgency," *The Journal of Strategic Studies* 33(1) (2010), 95) or David Kilcullen (Clemis, "Crafting non-kinetic warfare," 3). What is clear is that it developed as a specific reaction to the post-9/11 jihadist insurgent threat.

Global insurgents were ideologically-motivated ‘extremists’ pursuing other-worldly⁷⁵⁴ (or worldly but unappeasably totalitarian/chauvinistic⁷⁵⁵) objectives, seeking to gain territory and support by exploiting local grievances and instability⁷⁵⁶. Thus, while they themselves were *ideologically persuaded*, they hijacked local insurgencies through *post facto rationalisation* - offering leadership and ideological blueprints for rational hedgers looking for ways to remedy their material grievances⁷⁵⁷. Kilcullen – a prominent ‘new’ COIN architect⁷⁵⁸ - proposed a strategy of ‘disaggregation’: denying global insurgents causes to hijack by resolving the material grievances of local insurgents (primarily using ‘classical’ COIN-style interventions)⁷⁵⁹. Denied popular support in this way, global insurgents could be hunted down kinetically⁷⁶⁰. This sub-paradigm became highly influential⁷⁶¹, explicitly expressed in FM 3-24⁷⁶² and the US *National Military Strategic Plan for the War on Terrorism* (Feb. 2006)⁷⁶³ and US *National Strategy for Combatting Terrorism* (Sep. 2006)⁷⁶⁴.

⁷⁵⁴ For instance, Kilcullen asserted that global insurgents are not actually fighting to realise any material objectives, but rather engaged in violence as an end in itself – for the very purpose of being ‘mujahideen’ and gaining God’s favour (Kilcullen, “Counter-insurgency Redux,” 116). FM 3-24 concurs, while adding to this theme of non-material motivations by drawing upon themes popular in the conservative paradigm RVE literature, asserting that many are endeared towards extremists ideologies/movements because they offer “identity, purpose, and community, in addition to physical, economic, and psychological security” (Headquarters, U.S. Army Training and Doctrine Command, *FM 3-24*, 1:14)

⁷⁵⁵ For Mackinlay, al-Qaeda cannot be negotiated with because it “...has no realistic manifesto beyond a long term vision for a restored caliphate” – an objective it will not bend on, and the rest of the world cannot accept (quoted in Dixon, “Beyond Hearts and Minds,” 69). Again, FM 3-24 concurs, asserting that global insurgents “seek to impose revolutionary change worldwide” and “True extremists are unlikely to be reconciled to any other outcome than the one they seek” (Headquarters, U.S. Army Training and Doctrine Command, *FM 3-24*, 1:4 & 1:9, respectively).

⁷⁵⁶ Kilcullen, “Countering global insurgency,”; Tan, *U.S. Strategy*, 130.

⁷⁵⁷ *Ibid.*

⁷⁵⁸ As noted above. Beyond his influential roles in FM 3-24 and the ‘Surge’ campaign, he also served during this period as Chief Strategist at the *Office of the Coordinator for Counterterrorism*, U.S. Department of State. See author’s biography in David J. Kilcullen, “Three Pillars of Counterinsurgency,” *Remarks presented to the U.S. Government Conference on Counterinsurgency*, Washington, DC, September 28 2006.

⁷⁵⁹ Kilcullen discusses this strategy and its developments at length in David Kilcullen, *Blood Year: The unravelling of Western Counterterrorism* (New York: Oxford University Press, 2016).

⁷⁶⁰ Kilcullen, “Countering global insurgency.”

⁷⁶¹ Notably then-commander of US troops in Afghanistan David Barno (Barno, “Challenges in Fighting a Global Insurgency,”); frequent White House advisor Bruce Hoffman (as noted in Tan, *U.S. Strategy*, 136); influential British COIN critic John Mackinlay (Mackinlay, “Is UK Doctrine Relevant”); Donald Rumsfeld (noted in Ryan, *Full Spectrum Dominance*, 136), the British military’s own 2009 COIN manual (Chief of the General Staff, *British Army Field Manual*, 2:A:1); and military thinking more broadly (as noted in Jones & Smith, “Whose Hearts and Whose Minds?” 98).

⁷⁶² Headquarters, U.S. Army Training and Doctrine Command, *FM 3-24*, 1:4.

⁷⁶³ As noted in Ryan, *Full Spectrum Dominance*, 136.

⁷⁶⁴ “National strategy for combatting terrorism, September 2006”.

3.2.2.8. *The Faustian bargain sub-paradigm:*

More directly reflective of the perceived situation in Iraq – though subsequently generalised – this sub-paradigm also envisioned a stratified IV imaginary distinguishing a minority of irrational, ideologically-motivated ‘extremists’ (again *à la* conservative paradigm/GWOT imaginary) from a majority of progressive paradigm/‘classical’ COIN-style rational ‘hedgers’. As in ‘classical’ COIN, these hedgers were considered the centre-of-gravity, with insurgents and counterinsurgents competing for popular legitimacy⁷⁶⁵. However, the basis of this legitimacy was reimagined – with ‘classical’ COIN’s ethos on winning legitimacy through enhancing material quality-of-life seeming of little relevance when the ‘extremists’ were not offering the same benefits, actually spoiling the democratic project that most Iraqis appeared to support and offering instead only destruction and tyranny⁷⁶⁶. The COIN campaigns in Mosul, al-Qa’im, Tal Afar, and Ramadi suggested a different dynamic⁷⁶⁷: that “legitimacy is accorded to the element that can provide security, as citizens seek to ally with groups that can guarantee their safety⁷⁶⁸” (aka, the “theory of competitive control”⁷⁶⁹). ‘Extremists’ in Iraq, it seemed, were securing legitimacy among indigenous Sunni Arabs by 1) portraying themselves as solely willing and able to protect them from Shi’a/Kurdish predations (contrasted against allegedly inept/alooof Coalition forces)⁷⁷⁰; 2) providing financial incentives in an environment of mass

⁷⁶⁵ Headquarters, U.S. Army Training and Doctrine Command, *FM 3-24*, 1:9.

⁷⁶⁶ As heavily reified in the GWOT discourses detailed above.

⁷⁶⁷ For specifics and evidence, see the following footnotes.

⁷⁶⁸ Headquarters, U.S. Army Training and Doctrine Command, *FM 3-24*, 1:9. Mansoor, influential in both the writing of *FM 3-24* and the Surge campaign (as Petraeus’ chief executive office) concurred, relating that “The most important determinant of legitimacy is the ability to provide security for the population” - Mansoor, *Surge*, 38.

⁷⁶⁹ Kilcullen summarises the theory as “the local armed actor that a given population perceives as most able to establish a normative system for resilient, full-spectrum control over violence, economic activity, and human security is most likely to prevail”: See: David Kilcullen, *Counterinsurgency* (New York: Oxford University Press, 2010), 152.

⁷⁷⁰ During his campaign in Mosul, Petraeus had recognised that support for the insurgency among Iraqi Sunni Arabs seemed to be largely predicated on fear resulting from the bullish behaviour of Kurdish paramilitaries who had flooded the town following Saddam’s ouster. Conversely, his efforts to redress these ethnic tensions by disarming and expelling the paramilitaries and establishing ethnically and sectarianly balanced governing institutions seemed to facilitate a dramatic drop in that support. See: Eric Hamilton, “The fight for Mosul: March 2003-March 2008,” *Institute for the Study of War*, undated. Accessed June 14 2020. Available at: <http://www.understandingwar.org/sites/default/files/reports/Iraq%20Report%208.pdf>; Michael R. Gordon, “The struggle for Iraq: Reconstruction; 101st Airborne scores success in Northern Iraq,” *The New York Times*, dated September 4 2003. Accessed June 14 2020. Available at: <https://www.nytimes.com/2003/09/04/world/struggle-for-iraq-reconstruction-101st-airborne-scores-success-northern-iraq.html>. More influential were the lessons from Tal Afar, where Sunni support for the ‘extremists’ was noticed to be fuelled by sectarian abuses by the Shi’a dominated police, who had begun to act like a sectarian death squad. McMaster’s reconstitution of the police

unemployment⁷⁷¹; and 3) threatening violence against a Sunni community doubtful of the government's/Coalition's willingness/ability to protect them⁷⁷². Thus, the 'hedgers' support for the 'extremists' was reduceable to a reluctant, contingent Faustian bargain based not the 'extremists' ideology being deemed authentic or capable of deliverance, but rather on a desperate attempt to secure protection against both vengeful Shi'a-dominated government/paramilitaries and

force to make it more sectarianly-balanced (while vetting and firing sectarian officers) contributed towards the later pacification of the town. See: Rayburn, et al., *The U.S. Army in the Iraq War: Vol. 1*, 447-452; Mansoor, *Surge*, 24-25. More broadly, it was noted that AQI were reaching out to the Sunni population by presenting themselves as the only force willing and able to protect them from such sectarian abuses, and that this proposed alliance-of-convenience was often sufficient to galvanise cooperation. See: Ibid, 20-21; Kilcullen, *Counterinsurgency*, 153; David H. Ucko, *The new counterinsurgency era: Transforming the U.S. Military for modern wars* (Washington, DC: Georgetown University Press, 2009), 127.

⁷⁷¹ Again, Petraeus observed that his efforts to stimulate employment in Mosul aided in reducing support for the insurgency (Gordon, "The struggle for Iraq") while McMaster's intelligence gathering efforts in Tal Afar identified mass unemployment as a major cause of discontent (and window of opportunity for the insurgents to exploit through offering payments to fighters) (Rayburn, et al., *The U.S. Army in the Iraq War: Vol. 1*, 450). Alford's campaign in al-Qa'im and MacFarland's campaign in Ramadi perhaps did most to highlight this economic aspect, with economic issues playing a decisive role both in alienating the Sunni tribes from their erstwhile AQI allies (when AQI began infringing upon their smuggling activities) and in winning the tribes over to the US forces (when MacFarland began contracting US-funded development projects to building firms operated by tribal Sheikhs) (Mansoor, *Surge*, 131). This economic motive would be further reified during the Surge, when salaries paid to unemployed members of the Anbar Awakening forces were scaled to prevent AQI from outbidding them (Ibid, 141). FM 3-24 discusses how many are drawn to movements for purely financial reasons (Headquarters, U.S. Army Training and Doctrine Command, *FM 3-24*, 1:9), a contention later reified by detainee surveys, cited by Petraeus in a 2007 testimony to the *Committee on Armed Services*, which found the majority of detained insurgents to have been predominantly motivated by financial incentives (Committee on Armed Services, *Iraq Benchmarks: Hearings before the Committee on Armed Services, United States Senate: 110th Congress, First Session, September 7 and 11, 2007* (Washington, DC: U.S. Government Printing Office, 2008), 311).

⁷⁷² Al-Qa'im, Ramadi and, most notoriously, Tal Afar, elicited observations that AQI was ruling through intimidation rather than any other form of legitimacy (Mansoor, "Army," 79; Knarr, "Al-Sahawa," 5; Rayburn, et al., *The U.S. Army in the Iraq War: Vol. 1*, 448 & 458; Petraeus, "Forward," in Peter R. Mansoor, *Surge*, xii). Kilcullen would later remark that AQI "had a system of control based almost entirely on intimidation" (Kilcullen, *Counterinsurgency*, 153). In al-Qa'im, Tal Afar, and Ramadi, US troops learned that breaking this pal of fear seemed to be a reliable way of winning over Sunni popular support away from AQI and towards themselves. This was achieved through a strategy of "clear-build-hold" (which would become a centre piece of the 'new' COIN doctrine) in which US forces established close working relations with willing Sunni tribes so as to both work together to expel the 'extremists' from their neighbourhoods and then protect them from any retaliation through the establishment of combat outposts within cleared neighbourhoods alongside direct, rapid response communication lines (Major Niel Smith and Colonel Sean MacFarland, "Anbar Awakens: the tipping point," *Military Review* 88(2) (Mar.-Apr., 2008), 67-69; Rayburn, et al., *The U.S. Army in the Iraq War: Vol. 1*, 452-455, & 606; Knarr, "Al-Sahawa," 17; Toby Dodge, "Iraq, US policy," 80).

the racketeering ‘extremists’ themselves⁷⁷³. This sub-paradigm thus largely⁷⁷⁴ eschewed the progressive paradigm *post facto rationalisation* logic in favour of a purely self-preservationist one: the ‘extremists’ were merely the better of two evils (or even just an inescapable monster) – their ideology no more persuasive, even along *post facto rationalisation* lines – than it would have been absent crisis conditions. Offered alternative protectors, the population would gratefully relinquish this bargain - as vindicated in 2006 when Ramadi’s tribes – assured of enduring US protection – turned on the ‘extremists’⁷⁷⁵.

This Faustian bargain logic was not entirely new. ‘Classical’ COIN had acknowledged it in passing⁷⁷⁶ but emphasised positive appeals to legitimacy based on its foundational assumptions that grievances drove IV⁷⁷⁷. Only under ‘new’ COIN was it emphasised, informing its primary strategic logic.

3.2.2.9. *Containing IV under ‘new’ COIN:*

To a degree, ‘new’ COIN can be likened to a reprise of ‘classical’ COIN supplemented by several clumsily-appended conservative paradigm-style ideology-discrediting imperatives⁷⁷⁸ to address the apparently novel threat of religious ‘extremists’ (which FM 3-24 differentiates in both cause and substance from traditional “ideologies based on secular revolutionary ideals”)⁷⁷⁹; in the case of Islamist insurgents – through promoting ‘moderate’ Islam to debunk their own

⁷⁷³ In Kilcullen’s assessment, the ‘extremists’, for all their intimidation and savagery, were also treated as “useful idiots” by the Sunni Iraqi tribes seeking to hold of Shi’a ascendancy (David Kilcullen, “Anatomy of a tribal revolt,” *Small Wars Journal*, dated August 29 2007. Accessed January 23 2020. Available at: <https://smallwarsjournal.com/blog/anatomy-of-a-tribal-revolt>). In Mansoor’s mind this arrangement was more one-sided, constituting a “protection racket” in which “if the Iraqi government could not provide security, the insurgents and militias could and would— for a price” (Mansoor, *Surge*, 29).

⁷⁷⁴ A caveat expanded upon below.

⁷⁷⁵ As Kilcullen recalls, “When we finally succeeded in breaking their reign of terror and lifting the pall of fear off the community, people turned on them in a flash, and they were destroyed” (Kilcullen, *Counterinsurgency*, 153). MacFarland similarly recalled that “As long as they perceived us as mere interlopers, they dared not throw in their lot with ours. When they began to think of us as reliable partners, their attitudes began to change” (Smith and MacFarland, “Anbar Awakens,” 68).

⁷⁷⁶ The role of intimidation is briefly mentioned in some works from this period e.g., Galula, *Counterinsurgency Warfare*, 8, 34, & 83; and Roger Trinquier, *Modern Warfare: A French view of counterinsurgency*, trans. Daniel Lee (London and Dunmow: Pall Mall Press, 1964), 16-20.

⁷⁷⁷ As noted in Chapter 2.

⁷⁷⁸ Headquarters, U.S. Army Training and Doctrine Command, *FM 3-24*, 5:10.

⁷⁷⁹ *Ibid*, viii, 1:1, 1:2, 1:4, etc.

perverted understanding⁷⁸⁰. Indeed, ‘new’ COIN is often described as ‘neo-classical’ COIN⁷⁸¹. However, this is an oversimplification:

Firstly, because legitimacy is now understood to rest primarily on security (and only secondarily on material inducements), ‘new’ COIN prioritises breaking this Faustian bargain as its primary objective: assuring the hedging populace of enduring protection against both ‘extremist’ racketeers⁷⁸² and from those the ‘extremists’ are offering protection against⁷⁸³.

Secondly, the *global insurgency* sub-paradigm – which, unlike the *Faustian bargain* sub-paradigm, did consider *post facto rationalisation* – emphasised, in addition to ‘disaggregation’, burnishing the legitimacy of the host-government through ‘classical’ COIN-style appeals to legitimacy⁷⁸⁴; and waging *movement-discrediting* and *government-feting* information operations designed to inhibit/reverse *post facto rationalisation* by re-portraying the insurgents as the cause – rather than solution – to the population’s woes⁷⁸⁵.

These imperatives were encapsulated in the slogan “clear-hold-build”⁷⁸⁶: “Clear” and “hold” breaks the Faustian bargain by 1) expelling insurgents from population

⁷⁸⁰ Ibid, 1:18 & 5:10.

⁷⁸¹ Both ‘new’ COIN insiders like David Kilcullen (Kilcullen, “Counterinsurgency: the state of a controversial art,” 137) and various critics of varying degrees, notably: Frank G. Hoffman, “Neo-Classical Counterinsurgency,” *Parameters* (summer, 2007): pp. 71-87; Lawrence E. Cline, “COINdinistas versus whack-a-mole: the debate on COIN approaches,” in *The Future of Counterinsurgency: contemporary debates in internal security strategy*, eds. Lawrence E. Cline and Paul Shemella (Santa Barbara, CA: Praeger, 2015), 145; Matthew Cancian, “FM 3-24-2.0? Why US counterinsurgency doctrine needs an update,” *Modern War Institute at West Point*, dated February 21 2017. Accessed June 15 2020. Available at: <https://mwi.usma.edu/fm-3-24-2-0-us-counterinsurgency-doctrine-needs-update/>

⁷⁸² “Multi-National Force–Iraq Commander’s Counterinsurgency Guidance,” 287.

⁷⁸³ “Fact Sheet: The New Way Forward in Iraq,” *The White House*, dated January 10 2007. Accessed January 3 2020. Available at: <https://georgewbush-whitehouse.archives.gov/news/releases/2007/01/20070110-3.html>; Mansoor, *Surge*, 68; Andrews Sayle and Brands, “Introduction,” 3; Shifrin, “Campaign Analysis,” 622.

⁷⁸⁴ Ibid; Headquarters, U.S. Army Training and Doctrine Command, *FM 3-24*, 1:10; “Multi-National Force–Iraq Commander’s Counterinsurgency Guidance,” 288.

⁷⁸⁵ Movement-discrediting interventions sought to degrade the insurgents’ ability to portray themselves as valid and desirable alternatives to the government by publicising movement atrocities, failures, and generally depicting the insurgency as futile and losing (*à la* progressive *exploitation* sub-paradigm). Government-feting interventions sought to persuade the hedgers to give the government a chance to improve their circumstances by emphasising the government has learned from its mistakes and is taking efforts to reform, publicising military victories, humanitarian actions and development successes; fostering pride in national security forces. See: Headquarters, U.S. Army Training and Doctrine Command, *FM 2-24*, 1:8, 1:10, 5:2-5:9; Petraeus, “Forward,” in Mansoor, *Surge*, xix; Mansoor, *Surge*, 136, 160, 173, 176; “Multi-National Force–Iraq Commander’s Counterinsurgency Guidance,” 289.

⁷⁸⁶ Or the broadly-analogous “Shape-Secure-Develop” doctrine of the 2009 British Army COIN manual - Chief of the General Staff, *British Army Field Manual. Vol. 1, Part 10: Countering Insurgency*, 1:3.

centres and preventing their return (protecting the population from reprisals for their switching loyalties); and 2) protecting the population from predations of those responsible for pushing them into that Faustian bargain in the first place (e.g., Iraq's Shi'a militias)⁷⁸⁷. "Build" involves 'classical' COIN legitimacy building (and 'disaggregation') through material inducements – designed to convince 'hedgers' that they stood to gain more materially from the government than the insurgents⁷⁸⁸ - augmented by the above-noted *movement-discrediting* and *government-feting information operations*. Throughout, the rigidly stratified and dichotomised imaginary was maintained, prescribing distinct solutions for each group: *ideologically persuaded* 'extremists' were assumed 'irreconcilable' because of their irrational fanaticism, and could only be killed or captured. In contrast, the self-preservationist/*post facto rationalised* 'hedgers' were to be liberated and 'reconciled' using reason⁷⁸⁹.

While overwhelmingly built upon the above-outlined stratified IV imaginary formalised under the *global insurgency* and *Faustian bargain* sub-paradigms, there persisted ambiguity over the causal role of *ideological persuasion*; not only of the 'extremist' minority but the mass base also - a problem again exacerbated by failure to differentiate between *ideological persuasion* and *post facto*

⁷⁸⁷ Headquarters, U.S. Army Training and Doctrine Command, *FM 2-24*, chapter 5.

⁷⁸⁸ Particularly through addressing "the legitimate grievances insurgents use to generate popular support" (Headquarters, U.S. Army Training and Doctrine Command, *FM 3-24*, 1:10) and "foster[ing] [host-nation] legitimacy [...] [through] security, governance, economic revival, and provision of basic services" ("Multi-National Force–Iraq Commander's Counterinsurgency Guidance," 288).

⁷⁸⁹ As 'new' COIN architect Kilcullen later clarified, "Some insurgents at the irreconcilable extremes simply cannot be co-opted or won over; they must be hunted down, killed, or captured, and this is necessarily a ruthless process conducted with the utmost energy that the laws of war permit. [...] The reconcilables are typically those who are not ideologically committed and joined the insurgency for other reasons, such as a form of income, and could be convinced to lay down their weapons. The irreconcilables are those insurgents who are ideologically committed to the cause and could not be convinced to stop fighting. It is beneficial if the counterinsurgent can manage to separate the two classes of insurgents and only kill those active, irreconcilable combatants where there is no chance to bring them back, as an insurgent that is converted back is much more valuable than one that is dead." (David Kilcullen, *Counterinsurgency* (New York: Oxford University Press, 2010), 4-5). See also: Colonel Joel D. Rayburn, et al., *The U.S. Army in the Iraq War: Vol. 2: Surge and Withdrawal, 2007-2011* (Carlisle Barracks, PA: United States Army War College Press, 2019), 146; "Multi-National Force–Iraq Commander's Counterinsurgency Guidance," 228; Patraeus, "Forward," in Peter R. Mansoor, *Surge*, xii-xviii; Mansoor, *Surge*, 86; Nicholas J. Schlosser, *The Surge 2007-2008* (Washington, DC: Center of Military History United States Army, 2017), 30; Ganesh Sitaraman, *The Counterinsurgent's Constitution: Law in the Age of Small Wars* (New York: Oxford University Press, 2013), 118-128; Kaplan, *The Insurgents*, 219.

*rationalisation*⁷⁹⁰. 'New' COIN's architects, while generally embracing the progressive *exploitation* sub-paradigm or un-ideological self-preservationist logic for understanding the mass base, exhibited an unreconciled internalisation of conservative paradigm thinking. In particular, the *Islamic civil war/obediently violent* sub-paradigms seem to have persisted in their thinking – as attested by their proposals that secular education and 'moderate' Islamic teachings were necessary to demonstrate to 'hedgers' the falsity of the 'extremists' understanding of Islam⁷⁹¹. This was reified during the *Surge* by reports that detainee facilities were becoming "jihadi universities" in which 'extremist' prisoners were 'indoctrinating' non-extremist inmates⁷⁹² (again confused by the failure to differentiate between 'indoctrination' through *ideological persuasion* and *post facto rationalisation*). This reified perceived needs for bolted-on conservative paradigm-derived *ideology-discrediting* information operations⁷⁹³.

3.2.3. Mainstreaming of the hybrid paradigm:

The hybrid paradigm was embraced by official GWOT discourses – alongside much academic and journalistic commentary – upon the apparent success of the 'new' COIN doctrine built upon it in Iraq:

⁷⁹⁰ This is perhaps best encapsulated in a single paragraph from FM 3-24 which simultaneously upholds – almost word for word – both classic conservative paradigm/*ideological persuasion* (RVE) and progressive paradigm/*post facto rationalisation* (*exploitation* sub-paradigm) explanations of ideological-popularisation, when it states: "Ideas are a motivating factor in insurgent activities. Insurgencies can gather recruits and amass popular support through ideological appeal [...] provides members with identity, purpose, and community, in addition to physical, economic, and psychological security. The movement's ideology explains its followers' difficulties and provides a means to remedy those ills." (Headquarters, U.S. Army Training and Doctrine Command, FM 3-24, 1:14). More broadly, FM 3-24 speaks variously of "persuasion [...] [in which] Mass base members are often recruited and indoctrinated by the cadre" as a major driver of IV, often including the ideological conjuring of artificial grievances (ibid, 1:10) while also asserting that ideologies play a *post facto rationalisation* role (as noted above).

⁷⁹¹ Notably, FM 3-24 nods towards the 'Islamic civil war' sub-paradigm by comparing the insurgency to Europe's Reformation era wars of religion (ibid, 1:4) while, more specifically, leading 'new' COIN architect Colonel Mansoor asserted the conflict to be constitutive of an intra-Islamic civil war, and that countering the 'extremists' required distinctly conservative paradigm-leaning interventions such as "liberalisation and secular education" and that "the solution to Islamic radicalism had to come from within the Islamic tradition (Mansoor, *Surge*, 43-44).

⁷⁹² Tasikas, "The Battlefield inside the Wire," 65; Mansoor, "Army," 84-85; Patraeus, "Forward," xviii.

⁷⁹³ Headquarters, U.S. Army Training and Doctrine Command, FM 3-24, 1:18 & 5:10; Keach Hagey, "Iraqi prisoners get religion from U.S.," *CBS News*, dated September 19 2007. Accessed July 28 2020. Available at: <https://www.cbsnews.com/news/iraqi-prisoners-get-religion-from-us/>; Tasikas, "The Battlefield inside the Wire," 67; Scott Thompson, "House of Wisdom or a House of Cards? Why Teaching Islam in U.S. Foreign Detention Facilities Violates the Establishment Clause," *Nebraska Law Review* 88(2) (2009), 343; Mansoor, *Surge*, 264.

The new doctrine was put to the test in the 2006 Iraqi *Surge* campaign, where it was vindicated by strong correlations drawn between the breaking of the Faustian bargain between Sunni ‘extremists’ and ‘hedgers’ by Coalition troops and the simultaneous massive reduction in violence⁷⁹⁴ and largescale reconciling of ‘hedging’ Sunni tribes with the Iraqi government and counterinsurgent forces, which facilitated collaboration which drove underground the now isolated ‘irreconcilable’ ‘extremists’⁷⁹⁵. This ‘Sunni Awakening’ reified the *Faustian bargain* sub-paradigm in that the Sunni tribes turned wholeheartedly against their ‘extremist’ overlords once assured Coalition forces were committed to protecting them from both the ‘extremists’ and Shi’a militias⁷⁹⁶. Moreover, it suggested that legitimacy could be attained purely by providing physical security, with no need for political concessions, reforms, redistributive justice, or reconciliation, DDR and/or de-radicalisation programmes⁷⁹⁷, furthering reifying the *Faustian bargain* sub-paradigm.

Additionally, the ‘Sunni Awakening’ popularised assertions that the best way to break an ideology’s/movements appeal was to let it bury itself through its own excesses⁷⁹⁸, validating *movement-discrediting* information operations over *ideology-discrediting* ones (although this was rendered ambiguous by the apparent simultaneous success of *ideology-discrediting* information operations in detainee facilities⁷⁹⁹).

So successful was the Surge that commanders in Afghanistan immediately began drawing on FM 3-24’s Clear-Hold-Build strategy in their own operations⁸⁰⁰.

⁷⁹⁴ Reducing the rate of violent incidents by 90% over the course of seventeen months – see: Shifrin, “Campaign Analysis,” 17.

⁷⁹⁵ Rayburn, et al., *The U.S. Army in the Iraq War: Vol. 2*, xxxiv; Mansoor, *Surge*, 72.

⁷⁹⁶ Mansoor, *Surge*, 72.

⁷⁹⁷ James Shinn and James Dobbins, *Afghan Peace Talks: A Primer* (Santa Monica, CA: RAND Corporation, 2011), 11.

⁷⁹⁸ It was broadly recognised that AQI’s barbaric behaviour had alienated it from its erstwhile allies among the Sunni Iraqi tribes, pushing them to the point of rebellion which they finally acted upon once assured of counterinsurgent support and protection. See: Anthony N. Celso, “Phase IV’ Operations in the War on Terror: Comparing Iraq and Afghanistan,” *Orbis* 54(2) (2010), 192; Mansoor, *Surge*, 86, 120, 139, & 263.

⁷⁹⁹ Prison reforms, which among its initiatives included preaching ‘moderate’ Islam, succeeded in quelling previously endemic ‘extremist’-instigated prison riots as well as reducing the previously extremely high rate of recidivism down to just 1%. See: Mansoor, *Surge*, 154.

⁸⁰⁰ The commander of British forces in Afghanistan adopted the Surge’s ethos on reconciling ‘reconcilables’ and killing ‘irreconcilables’ in an interview of November 2006 (Sean Rayment, “Die-hard Taliban will have to be eliminated,” *The Telegraph*, dated November 12 2006. Accessed January 10 2020. Available at: <https://www.telegraph.co.uk/news/worldnews/1533903/Die-hard-Taliban-will-have-to-be-eliminated.html>). More concretely, the British 52 Brigade adopted FM 3-24 and employed its

The success of the 'new' COIN was lauded by the US and UK governments both for its success in Iraq and in hope that its humanitarian approach to COIN would pacify criticism over the early-GWOT's overly kinetic approaches⁸⁰¹. In 2009, both governments explicated a stratified IV imaginary for Afghanistan based on the *Faustian bargain* sub-paradigm⁸⁰² while Obama acceded to pressure from multiple corners⁸⁰³ to implement an Iraq-style 'Surge' in Afghanistan⁸⁰⁴.

The hybrid paradigm also captured academic and journalistic imaginations. Academically, a succession of studies on the Afghan insurgency seemed to verify its stratified IV imaginary⁸⁰⁵. In particular, the *Faustian bargain* sub-paradigm was substantiated by repeated conclusions that Taliban support among 'hedgers'

"Clear-Hold-Build" strategy during its deployment to Afghanistan in October 2007 (Farrell & Gordon, "COIN Machine," 22) and, a year later, ISAF issued a *Joint Campaign Plan* institutionalising "clear-hold-build" as a strategy (Steve Bowman and Catherine Dale, "War in Afghanistan: Strategy, Military Operations, and Issues for Congress," *Congressional Research Service* (Dec., 2009). Available at: <https://www.refworld.org/pdfid/4b3217e82.pdf>, 10).

⁸⁰¹ As noted in: Ward Gventer, "Keep the change," 250; David H. Ucko, "Counterinsurgency after Afghanistan: A concept in crisis," *PRISM* 3(1) (Dec., 2011), 7; Long, "Counter Insurgency," 555.

⁸⁰² See, for example: "David Miliband's speech"; President Obama's Remarks on New Strategy for Afghanistan and Pakistan," *The New York Times*, dated March 27 2009. Dated January 5 2020. Available at: <https://www.nytimes.com/2009/03/27/us/politics/27obama-text.html>; Gerry Gilmore, "Petraeus: Afghan 'surge' will target terror leaders," *U.S. Central Command*, dated December 4 2009. Accessed January 8 2020. Available at: <https://www.centcom.mil/MEDIA/NEWS-ARTICLES/News-Article-View/Article/883961/petraeus-afghan-surge-will-target-terror-leaders/>

⁸⁰³ Notably by Strategic Review Commissioner Bruce Riedel, Defense Secretary Robert Gates, Secretary of State Hillary Clinton, General David Petraeus, General Stanley McChrystal, Admiral Mullen. See: Michael J. Boyle, "Do counterterrorism and counterinsurgency go together?" *International Affairs* 86(2) (Mar., 2010), 334; Bowman and Dale, "War in Afghanistan," 2; Jackson, "US Strategy in Afghanistan," 91; Mark Landler, "The Afghan War and the evolution of Obama," *The New York Times*, dated January 1 2017. Accessed January 8 2020. Available at: <https://www.nytimes.com/2017/01/01/world/asia/obama-afghanistan-war.html>

⁸⁰⁴ Obama authorised an increase of foreign forces in Afghanistan from 60,000 to 140,000 personnel (Joseph J. Collins, "After the Afghan Surge: Rapid Exit or Better Peace?" *Small Wars Journal*, dated July 15 2014. Accessed June 12 2020. Available at: <https://smallwarsjournal.com/jrnl/art/after-the-afghan-surge-rapid-exit-or-better-peace>; Jackson, "US Strategy in Afghanistan," 90) and directed General Petraeus to implement a 'Surge' campaign based on that in Iraq (John Banister, "Narrativizing the Surge: From Quagmire to Counterinsurgency in Iraq," *Western Journal of Communication* (2020), 14).

⁸⁰⁵ Stenersen, *The Taliban insurgency*, 18-22; Garfield and Boyd, "Understanding Afghan Insurgents"; Collins, *Understanding War in Afghanistan*, 57; Barakat & Zyck, "Afghanistan's Insurgency"; Jones, *RAND Counterinsurgency Study: Vol. 4*, 40-41; Seth G. Jones, "The Rise of Afghanistan's Insurgency: State Failure and Jihad," *International Security* 32(4) (Spring, 2008), 9 & 27; "Report Afghanistan: Recruitment to Taliban," *Norwegian Country of Origin Information Centre* (Jun., 2017). Available at: <https://landinfo.no/wp-content/uploads/2018/03/Afghanistan-Recruitment-to-Taliban-29062017.pdf>, 9; Rahimi, "Afghanistan," 5; Waldman, "Dangerous Liaisons," 3; Fazlinaiem and Miszak, "Mullah Omar Wants You!"

resulted from Taliban coercion⁸⁰⁶; financial incentives⁸⁰⁷; fear of/anger towards government corruption, ineptitude, lack of service provision, and injustices⁸⁰⁸; and lack of faith in the government/occupying forces to protect them from Taliban reprisals should they support the government⁸⁰⁹. This was muddled, however, by continued conservative *obediently violent* sub-paradigm-aligned analyses of rank-and-file insurgent motivations, focussing particularly on prison ‘radicalisation’ (an outgrowth of the by-now established conservative RVE iteration)⁸¹⁰ and madrassa *ideological persuasion*⁸¹¹.

Thus, from this GA it can be seen that the ‘new’ COIN – and the hybrid paradigm it proposed – emerged in an extra-scientific, *ad hoc* manner responding to and building upon conflicting and unreliable discursive and empirical inputs. In doing so, it merely amalgamated, somewhat clumsily, arbitrarily, and ambiguously, aspects from both traditional paradigms – concretely in its stratified IV imaginary, and ambiguously through its failure to differentiate between *ideological persuasion* and *post facto rationalisation* and associated ambiguity over the causal and manifest natures of ‘extremist’ popular support. In the next section, I show how the paradigm fails to withstand logical and empirical scrutiny and, in doing so, finalise my critique of the extant body of knowledge and, moreover, my exploration of the traps, temptations, and limitations a new paradigm must avoid.

⁸⁰⁶ Minna Jarvenpaa, “Making Peace in Afghanistan The Missing Political Strategy,” *United States Institute of Peace* (Feb. 2011). Available at: <https://www.usip.org/sites/default/files/SR267Jarvenpaa.pdf>, 2-3; Collins, *Understanding War in Afghanistan*, 73; Erwin, “Key factors”; Waldman, “Dangerous Liaisons,” 4; Jackson, “US Strategy in Afghanistan,” 89.

⁸⁰⁷ Jones, *RAND Counterinsurgency*, 42; Seth G. Jones, “U.S. Strategy in Afghanistan,” *Testimony presented before the House Foreign Affairs Committee, Subcommittee on Middle East and South Asia*, April 2 2009. Available at: https://www.rand.org/content/dam/rand/pubs/testimonies/2009/RAND_CT324.pdf, 4; Rahimi, “Afghanistan,” 16; Waldman, “Dangerous Liaisons,” 4; Fazlinaiem and Miszak, “Mullah Omar.”

⁸⁰⁸ Collins, *Understanding War in Afghanistan*, 79; Dorransoro, “Who Are the Taliban?”; Dorransoro, “The Taliban’s winning strategy,” 12; Waldman, “Dangerous Liaisons,” 4; Jones, “U.S. Strategy in Afghanistan,” 4.

⁸⁰⁹ Jones, “U.S. Strategy in Afghanistan,” 3-4; Jones, “The Rise of Afghanistan’s Insurgency,” 27; Jarvenpaa, “Making Peace in Afghanistan,” 3; Collins, *Understanding War in Afghanistan*, 77 & 79; Erwin, “Key factors,”; Waldman, “Dangerous Liaisons,” 4.

⁸¹⁰ Reza Fazli, *et al.*, “Understanding and Countering Violent Extremism in Afghanistan,” *United States Institute of Peace* 379 (Sep., 2015), 6; Porges, “Radicalization Processes,” 13; Johnnie Auld, “The need for a national deradicalisation program in Afghanistan,” *Journal for Deradicalization* 15(4) (Fall, 2015), 219.

⁸¹¹ Qazi, “Review: The ‘Neo-Taliban’”; Celso, “‘Phase IV’ Operations,” 194; Barnett R. Rubin, *Afghanistan from the Cold War through the War on Terror* (New York: Oxford University Press, 2013), 217; Antonio Giustozzi, *The Taliban at War: 2001-2018* (New York: Oxford University Press, 2019), 59, 171, & 175; Porges, “Radicalization,” 13; Fazli, *et al.*, “Understanding and Countering Violent Extremism,” 8-9.

3.3. Evaluating the hybrid paradigm:

To a degree, the hybrid paradigm can be applauded for providing a heuristic means of re-imagining IV in a more nuanced and multi-variate light. However, it remains deeply flawed and thus unexamined reliance upon it may only store up problems for the future:

The main issues concern its stratified IV ‘imaginary’. This thrusting together – rather crudely – of two already problematic paradigms (conservative and progressive) perpetuates with further confusion those issues already outlined, while several new issues arise from their amalgamation. Notably:

- 1) Assuming that “ideological-motivation” automatically renders one an ‘irreconcilable extremist’ inimical to reason or negotiation is arbitrary, empirically unsustainable, and ideological. As Dixon notes, ample real-world instances exhibit factions matching these criteria – in N. Ireland, Malaya, Iraq, and Afghanistan, etc. – engaging in negotiations⁸¹². The assumption that they are inimical to compromise is produced by a lack of critical reflection as to what it means to be ‘ideologically-motivated’. It assumes – *à la* the conservative RVE iteration – that ‘ideological-motivation’ is both a state of altered consciousness (an abandoning of reason) and inherently chauvinistic/totalitarian. Unconsidered are alternative notions of ‘ideological motivation’ – e.g., as a rational (if potentially misguided) rejection of a grievance-inducing *status quo* and search for viable alternatives. Understood in this way, ‘ideologically motivated’ militants may be unwilling to reconcile with the *status quo*, but liable to consider more bilateral compromises. Moreover, by assuming the ‘ideologically-motivated’ to be irrational, irreconcilable, and totalitarian extremists, we also risk blurring the distinction – if one exists – between ‘extremists’ and ‘hedgers’, as both can become “ideologically-motivated” but through different dynamics (*ideological persuasion* vs. *post facto rationalisation*). The failure to differentiate between these dynamics may encourage us to misconstrue more stubborn ‘hedgers’ as irreconcilables when, in reality, they are rationally asserting a desire for justice beyond security and services.

⁸¹² Dixon, “Beyond Hearts and Minds,” 75.

This misconstrual is further encouraged by the *Faustian bargain* sub-paradigm's treatment of 'hedgers' as a-ideological self-preservationists, which creates a false dichotomy between the ideologically-motivated and materially-motivated, erasing *post facto rationalisation* altogether.

- 2) Assuming that those who refuse reconciliation with the *status quo* in return for basic security and material provisions are irreconcilable, totalitarian 'extremists' is a huge logical leap. Firstly, it encourages the belief that conflict resolution/reform/compromise is irrelevant, and that anyone demanding more than security and service provision is irrational and lacks legitimate grievances. This can encourage reinforcing flawed *status quos* that render 'hedgers' amenable to *post facto rationalisation* in the first place. This assumption becomes more pronounced when individuals refuse reconciliation to democratic *status quos*, as our Western democracy-normative ideology encourages us to assume 1) that democracies automatically cater for all reasonable demands and 2) that, to oppose democracy, one must subscribe to its assumed antonyms: totalitarianism, intolerance, tyranny, etc. Alternative models for delivering democracy's proposed ends (chiefly justice and flourishing) are not considered. This was the case in Iraq and Afghanistan, but we must consider that their populations have hardly been given reasons to expect justice and prosperity from democracy, producing, as it has, ethno-sectarianism, corruption, wealth disparities, and extreme violence locally (Iraq, Afghanistan, Lebanon, etc.) and, globally, intense socioeconomic inequality and malaise, socio-political polarisation, and intolerant populisms. Surely, the example of the first Muslim community – which Iraq's and Afghanistan's 'extremists' sought (however errantly) to restore - provides a far more convincing blueprint for justice and prosperity among local milieus.
- 3) The *Faustian bargain* sub-paradigm's assumption that 'hedgers' are a-ideological obscures the nuanced causal and manifest natures of *post facto rationalisation*. Even if an individual sides with the movement reluctantly for reasons of self-preservation, they may nevertheless internalise its diagnostic frames – e.g., that democracy is a US-Shi'a

conspiracy to subjugate Sunnis – meaning it may require more than bread-and-butter inducements to assuage their anxieties. Thus, assuming Faustian bargain-breaking to be sufficient for reconciling ‘hedgers’ to the *status quo* is precarious and, absent far-reaching reforms, is likely to stoke future recurrences of IV, as communities forced to choose the lesser of two evils will remain amenable to lesser evils still, even if wolves in sheep’s clothing.

- 4) The *Faustian bargain* and *global insurgency* sub-paradigms arbitrarily dismiss foreign fighters as pathological extremists: Because the stratified IV imaginary is dichotomising, then those not fitting into one category (Faustian hedgers or materially-motivated local insurgents) must belong in the other (totalitarian extremists). This logic-trap constrains against alternative interpretations of foreign fighter motivations (which might promote confronting them in different, potentially more constructive ways); for example, noble but misguided motivations (idealism, compassion for those suffering in distant lands, etc). This has been the dominant explanation for prior, less-stigmatised foreign fighter mobilisations after all, from Lord Byron’s involvement in the *Greek War of Independence* (1821-1832) to the *International Brigades* of the *Spanish Civil War* (1936-1939). Far from pathological or intolerant, we typically view such individuals as idealistic, if not heroic. Yet when considering Islamist foreign fighters, we immediately assume *ideological persuasion* into religious chauvinism. Additionally, by dismissing foreign fighters as *obediently violent* ‘extremists’, we may ignore early symptoms of trouble brewing in their own homelands (e.g., ‘radicalisation hotbeds’ like Brussel’s now notorious Molenbeek neighbourhood⁸¹³, etc.).

⁸¹³ The concept of ‘radicalisation hotbeds’ is an example of the tendency for scholars to attempt to cram progressive paradigm ideas into conservative paradigm constructs purely because those constructs have come to monopolise discourse and research on the topic. In contradistinction to most theorising on the ‘radicalisation’ construct, the ‘Radicalisation hotbeds’ theory considers explicitly macroscopic causation – attributing support for violent movements like AQ and IS to insufficient opportunities for meaningful employment and advancement, and early exposure to relative-deprivation, crime, delinquency and broken homes, etc., all of which are deemed to render members of those communities ‘vulnerable’ to, implicitly, post facto rationalisation. This hypothesis is derived from two empirical observations: Firstly, that relatively-deprived neighbourhoods tend to ‘produce’ far more ‘extremists’/militants than their relatively-affluent neighbours: Molenbeek has become a particularly notorious case-study of this: It is the second poorest commune in Belgium, has a youth unemployment rate of 41%, and 57.2% of the population has not advanced beyond secondary education. Overall, 57% of the population are

- 5) The dichotomy between ideological-motivation and material-motivation (itself under-explicated and operationalised) is a false one which encourages misleading characterisations and conclusions. What should instead be considered, as we attempt to accurately attribute causation and remedies, is not what motivates an individual, but rather what causes that individual to be motivated – *ideological persuasion* or *post facto rationalisation*?

Additionally, as I have begun to explore, the hybrid paradigm fails to delineate between *ideological persuasion* and *post facto rationalisation*. This promotes confusion when interpreting empirical observations (e.g., indoctrination of hedgers by Imams or ‘extremist’ detainees) and, moreover, blurs the distinction – if one exists – between ‘extremists’ and ‘hedgers’: by failing to differentiate the two dynamics, we may denounce as ‘extremists’ individuals expressing *any* degree of ideological sentiment.

Finally, ‘new’ COIN’s *ideology-discrediting* interventions are logically ambiguous. If ‘extremists’ are beyond reason, then attempting to discredit their ideology is futile (their being resistant to logical refutations) while, if the ‘hedgers’ are purely a-ideological self-preservationists (*à la Faustian bargain* sub-paradigm) then *ideology-discrediting* interventions are redundant. Only where *post facto rationalisation* (*à la exploitation* sub-paradigm) is responsible is there potential relevance, but considerable exploration is required to undertake effectively; requiring accurate identification of the ‘centre-of-gravity’ of *post facto rationalised* ideological sentiments (does it require, for example, convincing *post*

deemed to live under the poverty line. 54 Molenbeek residents have travelled to join jihadist groups in Syria – 10% of the country’s total – while the Belgian Prime Minister has asserted that nearly all those Belgians departing for Syria have links with Molenbeek (Rik Coolsaet, *Molenbeek and violent radicalisation: ‘a social mapping’* (Brussels: European Institute of Peace, 2017), 14-20; Julia Lynch, “Here’s why so many of Europe’s terrorist attacks come through this one Brussels neighbourhood,” *The Washington Post*, dated April 5 2016. Accessed October 9 2019. Available at: <https://www.washingtonpost.com/news/monkey-cage/wp/2016/04/05/heres-why-so-many-of-europes-terror-attacks-come-through-this-one-brussels-neighborhood/>). Secondly, many individuals engaged in IV have tended to have come from impoverished backgrounds where they were previously un-/under-employed: Bakker and de Bont found that Belgian and Dutch volunteers joining IS came almost exclusively from the lower and middle strata of society, and had a high likelihood of being previously unemployed at their time of joining (Bakker & de Bont, “Belgian and Dutch Jihadist,” 843). Khosrokhavar has dubbed such ‘radicalisation’-prone neighbourhoods – characterised by higher-than average unemployment rates, ghettoization, high school drop-out rates and high delinquency – “jihadogenous urban structure”. Within the European context, he asserts that such neighbourhoods constitute “significant and even essential factors of jihadist radicalization” - Farhad Khosrokhavar, “The jihadogenous urban structure,” *Open Democracy*, dated June 9 2018. Accessed October 9 2019. Available at: <https://www.opendemocracy.net/en/jihadogenous-urban-structure/>.

facto rationalised ‘hedgers’ that 1) the ‘extremists’ understanding of Islam is inaccurate; 2) the ‘extremists’ ideological vision will not improve their quality-of-life; 3) specific aspects of the ‘extremists’ propaganda – e.g. that the Sunnis are victims of a US-Shi‘a conspiracy – are inaccurate?; etc).

Thus, not only does the hybrid paradigm rest on shaky foundations crudely assembled, it leaves many questions unanswered, while the answers it does provide – often vaguely – are likely to further confuse the way we understand IV, and inform potentially ineffective or even counterproductive remedial strategies.

3.4. GWOT pessimism and ‘paradigm exhaustion’:

In the remainder of this chapter, I briefly outline how the apparent failures of the GWOT promoted a pervasive sense of demoralisation and ‘paradigm exhaustion’ by the turn of the GWOT’s second decade. The result, manifested in responses to the Islamisation of the *Syrian Armed Opposition Movement* [SAOM] and IS, was a lack of confidence in either extant paradigm (conservative, progressive, or hybrid) and a resulting ‘anarchic’ turn towards less theoretically-grounded, idiosyncratic claims making.

3.4.1. GWOT pessimism:

While the success of the Iraqi Surge promoted brief optimism and a sense of vindication over the hybrid paradigm and the ‘new’ COIN doctrine built upon it, this was short-lived. Attempts to apply the ‘new’ COIN to an Afghan Surge produced disappointing results⁸¹⁴ (though this was, arguably, a failure of resourcing more than a failure of strategy, at least in part⁸¹⁵), while the tenth anniversary of the GWOT’s commencement was met with pessimist evaluations

⁸¹⁴ The Afghan Surge failed to reduce violence levels (Jackson, “US Strategy in Afghanistan,”); or ‘hold’ and ‘build’ ‘cleared’ areas (Collins, *Understanding War in Afghanistan*, 86); while an Iraqi-style popular ‘awakening’ failed to materialise (Stephen Biddle, et al., “Testing the Surge: Why Did Violence Decline in Iraq in 2007?” *International Security* 37(1) (Summer 2012), 37).

⁸¹⁵ Innes-Robbins notes that there were not enough troops on hand to achieve the vital Faustian bargain-breaking objectives of the Surge (protecting the population by holding cleared territories) while, more precisely, Hirsh and Tarabay have noted that, to meet the ‘new’ COIN doctrine’s stipulation that 20 soldiers per 1,000 civilians are required to protect the populace, the Afghan ‘Surge’ would have needed to inject at least 600,000 troops into the country, far beyond the 140,000 actually deployed. See: Innes-Robbins, *Dirty Wars*, Location 4516; and Hirsh and Tarabay, “Washington Losing Patience,” respectively.

of progress today and prospects to come⁸¹⁶. By 2010, the Obama administration had effectively abandoned not just the hybrid paradigm but any practical attempts to address the root-causes of IV, returning to enemy-centric COIN in Afghanistan (focused on “killing enough Taliban [...] to drive the leaders to the peace table⁸¹⁷”) and blunt-force security partnerships aimed at kinetically repressing violent Islamist groups in authoritarian states⁸¹⁸. While these kinetic efforts were theoretically augmented by vague and seemingly pessimistic commitments to ideology-discrediting interventions and encouraging democratising reforms in authoritarian states, this was not to come at the expense of stability or counterterrorism efficiency⁸¹⁹: the stick would trump the carrot, the hydra would be pruned, not extirpated.

It was into this state of pessimism and malaise that the 2011 ‘Arab Uprisings’ erupted. When armed Islamist factions proliferated in post-revolutionary Tunisia and Libya, the Sinai Peninsula and, above all, Syria, responses in the West –

⁸¹⁶ In 2010, senior counterterrorism officials in both the US and the UK issued pessimistic prognoses, asserting that there seemed no end in sight to the GWOT and that AQ had in fact decentralised, diffused and grown as a result of it, see: Pam Benson, “9 years in Afghanistan: experts see worldwide war with no end in sight,” *CNN*, dated October 7 2010. Accessed December 16 2019. Available at: <https://edition.cnn.com/2010/POLITICS/10/07/afghanistan.nine.years/index.html> and “‘War on Terror’ to last as long as Cold War,” *The Telegraph*, dated February 9 2010. Accessed December 16 2019. Available at: <https://www.telegraph.co.uk/news/uknews/terrorism-in-the-uk/7199337/War-on-Terror-to-last-as-long-as-Cold-War.html>, respectively. In particular US intelligence analysts assessed the AQ threat to have grown more diffuse, becoming less a (comparatively) easily traceable organisation and more a decentralised movement inspired by a single ideology, increasingly the likelihood of smaller scale but higher frequency and less predictable attacks across the world, including domestically where considerable concern was mounting over domestic ‘radicalisation’ – see: Matthew Levitt, “Introduction,” in *Obama’s National Security Vision: Confronting Transnational Threats with Global Cooperation*, ed. Matthew Levitt (Washington, DC: The Washington Institute for Near East Policy, 2010), 3-4.

⁸¹⁷ Michael Hirsh and Jamie Tarabay, “Washington Losing Patience with Counterinsurgency in Afghanistan,” *The Atlantic*, dated June 28 2011. Accessed June 12 2020. Available at: <https://www.theatlantic.com/international/archive/2011/06/washington-losing-patience-with-counterinsurgency-in-afghanistan/240982/>. See also: Jessica Tuchman Mathews, “Another new strategy in Afghanistan,” *Carnegie Endowment for International Peace*, dated June 22 2011. Accessed December 3 2019. Available at: <https://carnegieendowment.org/2011/06/22/another-new-strategy-in-afghanistan-pub-44788>; Paul Dixon, “Conclusion: The Military and British Democracy,” in *The British Approach to Counterinsurgency: From Malaya and Northern Ireland to Iraq and Afghanistan*, ed. Paul Dixon (New York: Palgrave Macmillan, 2012), 362; Collins, “After the Afghan Surge.”

⁸¹⁸ *National Security Strategy* (Washington, DC: The White House, May, 2010). Available at: https://www.whitehouse.gov/sites/default/files/rss_viewer/national_security_strategy.pdf, 1, 3, 4, 11 & 21; Indyk, et al., *Bending History*, 143-144; Gerges, “The Obama approach,” 302 & 307; Tankel, *With us and against us*, 2, 57-58 & 76.

⁸¹⁹ Indyk, et al., *Bending History*, 143-144; Gerges, “The Obama approach,” 299 & 306; Daniela Huber, “A Pragmatic Actor — The US Response to the Arab Uprisings,” *Journal of European Integration* 37(1) (2015), 57; Tankel, *With us and against us*, 76-77.

political and popular – were characterised by an excess of panicked demoralisation and a lack of confident interpretive paradigms. For the sake of brevity, I will limit my analysis to responses to the Islamisation of the SAOM and, above all, the IS phenomenon, which provide an accessible microcosm for the broader picture:

3.4.2. Syria's Islamist rebels and the IS phenomenon – official responses:

Western responses to the increasing dominance of Islamist factions within the SAOM were characterised by a clash between two camps citing opposing paradigms. On one side, the hawks cited the hybrid paradigm to suggest that Syrians were striking a Faustian bargain with the 'extremists' because the West was not doing enough to protect them against the Assad regime. The answer, they proposed, was to provide arms to the Syrian rebels so as to free them from that Faustian bargain, the inevitable result of which would be the marginalisation of those extremist factions who did not share the secular democratic aspirations of the majority⁸²⁰. In the opposite camp were those who, it seems adhering to some form of the conservative paradigm, feared the SAOM was being overrun by extremists, and therefore to arm the rebels would be to empower those extremists⁸²¹. At the sharp end of this camp were those who urged support for Assad who, as a secularist, was at least more 'reasonable' than a bunch of 'religious fanatics', so they reasoned⁸²².

When IS' expansionism in 2014 necessitated robust action, the Global Coalition [GC] assembled to combat the group struggled to formulate a strategy⁸²³. The plan that did coalesce, *Combined Joint Task Force – Operation Inherent Resolve*

⁸²⁰ Mazzetti, et al., "Obama's Uncertain Path,"; Phillips, *The Battle for Syria*, 143-144; Glass, "'Tell me how this ends,'" ; Gordon and Landler, "Backstage Glimpses of Clinton,"; McKelvey, "Arming Syrian rebels,"; Spyer, "Towards A Coherent Western Policy," 7.

⁸²¹ Jonathan Spyer, "Towards A Coherent Western Policy On The Syrian War," *Centre for the New Middle East Policy Paper No. 7* (2016), 7; Phillips, *The Battle for Syria*, 144.

⁸²² E.g., Abrahms, "The U.S. Should Help Assad"; Fuller, "Embracing Assad"; Khalidi, "To crush ISIS"; Hallen, "Accept the uncomfortable truth"; Walt, "Assad is now Syria's best-case scenario"; Lieven, "The key to crushing ISIS"; Johnson, "Let's deal with the Devil".

⁸²³ A year after CJTF-OIR's announcement, both Obama and Cameron admitted they still lacked a firm strategy for containing the group. See: David Kilcullen, "Islamic State: time to recognise a failing strategy," Australian Strategic Policy Institute, dated July 8 2015. Accessed January 18 2020. Available at: <https://www.aspistrategist.org.au/islamic-state-time-to-recognise-a-failing-strategy/>. As 'new' COIN architect Kilcullen complained, "degrade and destroy" was the closest thing the anti-IS Global Coalition [GC] had to a strategy (Specifically, Kilcullen asserts that "degrade and destroy" [...] [was] President Obama's phrase, from the outset of the air campaign, that constituted the nearest thing available to a coalition war aim" (Kilcullen, *Blood Year*, 136)).

[CJTF-OIR], proposed ten strategic interventions, of which seven – denoted by *italics* – focused on combating the group at the point of causation:

- Militarily defeating IS as a physical entity;
- Preventing the movement of ‘foreign terrorist fighters’;
- Disrupting IS’ financing and funding;
- *Countering IS’ propaganda/ideology;*
- *Building ‘resilience’ among individuals and communities deemed ‘vulnerable’ to IS’ propaganda/ideology;*
- *‘Stabilising’ territories recaptured from IS;*
- *Addressing humanitarian fallout from ‘the IS crisis’;*
- *Fostering inclusive and efficient governance in Iraq;*
- *Empowering ‘moderate’ factions of the SAOM; and*
- *Reaching a political settlement of the Syrian conflict*⁸²⁴.

This strategy essentially reprised the hybrid paradigm-based ‘new’ COIN of the previous decade, augmented with bolted-on imperatives drawn from usually-domestically-oriented CVE, alongside blunt, kinetic militarism – delivered with a

⁸²⁴ These objectives have been articulated – with occasional nuances in phrasing – across official CJTF-OIR documentation and press releases (e.g., “Joint Statement from the Global Coalition”; “Mission statement of the Global Coalition”), by government statements of CJTF-OIR participating states (e.g. Office of the Press Secretary [The White House], “Fact Sheet: Strategy to Counter the Islamic State of Iraq and the Levant (ISIL),” *The White House*, dated September 10 2014. Accessed December 5 2019. Available at: <https://obamawhitehouse.archives.gov/the-press-office/2014/09/10/fact-sheet-strategy-counter-islamic-state-iraq-and-levant-isil>; “The Global Coalition To Defeat ISIS,” *Department of State* [US], undated. Accessed September 5 2018. Available at: <https://www.state.gov/s/seci/>; “UK action to combat Daesh,” *UK Government*, undated. Accessed September 5 2018. Available at: <https://www.gov.uk/government/topical-events/daesh/about>; House of Commons Defence Committee (UK), “UK military operations in Syria and Iraq: Second Report of Session 2016–17 Report, together with formal minutes relating to the report,” *House of Commons*, September 13th, 2016. Available at: <https://publications.parliament.uk/pa/cm201617/cmselect/cmdfence/106/106.pdf>; House of Commons Defence Committee (UK), “UK military operations in Syria and Iraq: Government Response”), by specific governmental agencies of those participating states (e.g. “Development Tracker: Syria Resilience,” *Foreign and Commonwealth Office* [UK], undated. Accessed September 5 2018. Available at: <https://devtracker.dfid.gov.uk/projects/GB-GOV-3-CSSF-06-000009>; “Official Statistics: Providing non-humanitarian assistance”; “Syria Crisis Response Summary,” *Department for International Development* [UK] (Aug., 2018) Available at: <https://reliefweb.int/sites/reliefweb.int/files/resources/UK-Syria-Crisis-Response-Summary-August18.pdf>), and by supranational organisations directly cooperating with CJTF-OIR (e.g. Carmen-Cristina Cîrlig, “The international coalition to counter ISIL/Da’esh (the ‘Islamic State’),” *European Parliament Briefing* (March 15 2015); “Joint Communication to the European Parliament and the Council: A strategic approach to resilience in the EU’s External Action,” *European Commission* (Jun., 2017). Available at: https://cdn3-eeas.fpfis.tech.ec.europa.eu/cdn/farfuture/PUIImx_Fcf0aVi0BCzKOOQfhWpRnLFU8yo2beSh0o3so/mtime:1496850611/sites/eeas/files/join_2017_21_f1_communication_from_commission_to_inst_en_v7_p1_916039.pdf; “Resilience Building: In response to the Syria Crisis,” *United Nations Development Programme* (2015). Available at: <https://www.undp.org/content/dam/rbas/doc/SyriaResponse/Kuwait%20III/Resilience%20Buildinq%20In%20response%20to%20the%20Syria%20Crisis%20Eng.PDF>).

deficit of political will or material commitment⁸²⁵. Given my exploration of the malaise pervading understandings of IV causation – coupled with Obama and Cameron’s admissions of strategic inertia and the timidity/half-heartedness of CJTF-OIR’s execution⁸²⁶ – this hodgepodge strategizing bears the hallmarks of this malaise; strategists hurling at IS all available, loosely-relevant remedial repertoires in the hope that some of it stuck.

Further complicating, and attesting to, this malaise, CJTF-OIR was delivered – like the early GWOT - with a chaotic, conflicting set of ‘pan-paradigmatic’ discourses. Overwhelmingly, official discourses⁸²⁷ reified conservative paradigm-style conceptualisations of IS. Specifically, the three main RVE iteration sub-paradigms were employed to depict IS as a product of *ideological persuasion* through false understandings of Islam⁸²⁸ (*obediently violent* sub-paradigm), erroneous narratives of blame and conspiracy theories⁸²⁹ (*false grievance* sub-paradigm), and the provision of identity, belonging, etc., to the psychologically-unfulfilled⁸³⁰ (*post facto grievance* sub-paradigm). Augmenting this was an orientalist narrative explaining the broader conflict as a continuation of a 1,400-year-old doctrinal dispute between Sunnism and Shi‘ism⁸³¹, a variation on the

⁸²⁵ See below.

⁸²⁶ See below.

⁸²⁷ Those of official CJTF-OIR spokespersons/public statements and key political figures from contributing nations (most of all Obama and Cameron).

⁸²⁸ See for example: General John Allen (Special Presidential Envoy for the Global Coalition to Counter ISIL), “A Global, Coordinated, and Enduring Response,” *Statement submitted for the conference “Taking the Fight to ISIL: Operationalizing CT lines of effort against the Islamic State Group,” Washington Institute for Near East Policy* (February 2 2015), 3; Office of the Press Secretary [White House], “FACT SHEET: Strategy to Counter the Islamic State”; “Mission statement of the Global Coalition”; “UK action to combat Daesh”; “Joint Statement from the Global Coalition”; Dearden, “David Cameron extremism speech”; “Read the Full Text of President Obama’s Address to the Nation on Terrorism,” *Time*, December 6 2015. Accessed September 10 2019. Available at: <https://time.com/4137986/obama-address-transcript-terrorism-isis-isil-oval-office/>; “Prime Minister on ISIL”.

⁸²⁹ Dearden, “David Cameron extremism speech”.

⁸³⁰ See for example: Ibid; Office of the Press Secretary, “FACT SHEET: The White House Summit on Countering Violent Extremism,” *The White House*, dated February 18 2015. Accessed February 1 2020. Available at: <https://obamawhitehouse.archives.gov/the-press-office/2015/02/18/fact-sheet-white-house-summit-countering-violent-extremism> .

⁸³¹ Notably Obama’s much parroted (see Appendix A) remark that “The Middle East is going through a transformation that will play out for a generation, rooted in conflicts that date back millennia” - Office of the Press Secretary, “Remarks of President Barack Obama – State of the Union Address as delivered,” *The White House*, dated January 13 2016. Accessed June 14 2020. Available at: <https://obamawhitehouse.archives.gov/the-press-office/2016/01/12/remarks-president-barack-obama-%E2%80%93-prepared-delivery-state-union-address>. For a more general discussion of this trend, see: Nader Hashemi & Danny Postel, “Sectarianization: Mapping the New Politics of the Middle East,” *The Review of Faith & International Affairs* 15(3) (2017): pp. 1-13.

culturally vulnerable sub-paradigm postulating “that these people just hate each other because that's how they are ‘over there,’⁸³²”. Simultaneously, however, resolutions to “address the underlying grievances and conflicts that feed extremism⁸³³” - in particular the Syrian conflict⁸³⁴ - permeated this discourse, à la progressive/hybrid paradigms.

3.4.3. Syria's Islamist rebels and the IS phenomenon – popular responses:

Non-governmental responses were equally confused, both at the levels of academic scholarship and popular impulse:

Academically, explanations for the ‘extremist’ ideological-popularisation in the SAOM and IS spanned extant paradigms, often with considerable overlap, the same scholars frequently dipping between paradigms:

- *Conservative paradigm attributions:*
 - The Syrian conflict attracted *obediently violent* sectarian ‘extremists’ internationally due to its suitability for projecting sectarian ideological narratives⁸³⁵.
 - Prior to the conflict, Syria experienced an influx of Salafi and/or Sunni-chauvinist preachers (often considered a deliberate regime strategy to redirect Sunni-Syrian anti-regime animus towards external enemies like the US), predisposing the population towards ‘extremist’ ideologies⁸³⁶.
 - ‘Extremist’ preachers exploited the security vacuum resulting from the conflict to preach their ideology⁸³⁷.
 - Internationally, influential sheikhs were depicting Syria as a sectarian ‘jihad’ and declaring it an individual duty for Muslims to participate⁸³⁸.

⁸³² Max Fisher, “Obama's cringe-worthy line claiming Middle East conflicts “date back millennia”,” *Vox*, dated January 12 2016. Accessed June 14 2020. Available at: <https://www.vox.com/2016/1/12/10759008/state-union-address-obama-middle-east-millennia>

⁸³³ Office of the Press Secretary, “FACT SHEET: The White House Summit on Countering Violent Extremism”.

⁸³⁴ “UK action to combat Daesh.”

⁸³⁵ Rich, “Radicalising Syria”.

⁸³⁶ Lund, “Syria's Salafi Insurgents”, 7-8; Christopher Phillips, “Sectarianism and conflict in Syria,” *Third World Quarterly* 36(2) (2015), 368; Charles Lister, “Evolution of an Insurgency: How Syria Was Radicalized,” *Foreign Affairs*, dated March 14 2016. Accessed October 7 2018. Available at: <https://www.foreignaffairs.com/articles/syria/2016-03-14/evolution-insurgency>

⁸³⁷ Moshe Ma'oz, “The Arab Spring in Syria: Domestic and regional developments,” *Dynamics of Asymmetric Conflict* 7(1) (2014), 50.

⁸³⁸ Desai, “Syrian Revolution,” 16; Phillips, “Sectarianism,” 370; Rabil, *Salafism in Lebanon*, 222-228.

- *Progressive paradigm attributions:*
 - *Exploitation* sub-paradigm: the simplistic, black-and-white sectarian framing of ‘extremist’ Salafi ideological narratives provide easily absorbed and cathartic frameworks for Sunni rebels to understand and justify their participation in the conflict⁸³⁹.
 - *Organic* sub-paradigm: the SAOM’s ‘Islamisation’ was a largely organic, bottom-up process resulting from 1) natural increases in religiosity resulting from the trauma and mortality of war (rendering individuals more amenable to religious identities and ideologies)⁸⁴⁰; and 2) Salafism’s superior capacity to provide an appropriate, shared identity, universe of meaning, and revolutionary ascetic in a conflict defined by sectarianism⁸⁴¹ (sectarianism cultivated by regime machinations⁸⁴², increasingly sectarian lines of belligerence⁸⁴³, external actors framing the war in sectarian terms⁸⁴⁴, and the dialectic of such sect-defined belligerence⁸⁴⁵).
- *Hybrid paradigm attributions:*
 - *Global Insurgency* sub-paradigm: emphasised the foreign origins of many Islamist/‘extremist’ leaders/fighters/factions to depict them as foreign interlopers ‘hijacking’ the revolution in pursuit of their global, chauvinistic agenda, unconcerned for the Syrian people’s aspirations⁸⁴⁶.

⁸³⁹ Lund, “Syria’s Salafi Insurgents,” 3 & 10; Baczko, et al., *Civil War*, 179; Lister, *The Syrian Jihad*, 390; International Crisis Group, “Tentative Jihad,” 5; Yassin-Kassab and al-Shami, *Burning Country*, 120; Pierret, “Better Assad,” 248.

⁸⁴⁰ Lund, “Syria’s Salafi Insurgents,” 19; Baczko, et al., *Civil War in Syria*, 180; Nir Rosen, “Islamism and the Syrian uprising,” *Foreign Policy*, dated March 8 2012. Accessed September 7 2018. Available at: <https://foreignpolicy.com/2012/03/08/islamism-and-the-syrian-uprising/>; Phillips, *The Battle for Syria*, 129; Yassin-Kassab and al-Shami, *Burning Country*, 109 & 121.

⁸⁴¹ Lund, “Syria’s Salafi Insurgents,” 10; Baczko, et al., *Civil War*, 179-181; O’Bagy, “Jihad in Syria,” 23.

⁸⁴² Phillips, “Sectarianism,” 369; Phillips, *The Battle for Syria*, 131; Yassin-Kassab and al-Shami, *Burning Country*, 48; Frederic C. Hoff and Alex Simon, “Sectarian Violence in Syria’s Civil War: Causes, Consequences, and Recommendations for Mitigation,” *A Paper Commissioned by The Center for the Prevention of Genocide, United States Holocaust Memorial Museum* (Mar., 2013), 19; International Crisis Group, “Syria’s Mutating Conflict,” *IGC Middle East Report* 128 (Aug., 2012), 5; “Syria’s Armed Opposition: A Spotlight on the ‘Moderates,’” *Small Arms Survey Dispatch* 5 (Jan., 2016), 4; Pierret, “Better Assad” 248.

⁸⁴³ Phillips, “Sectarianism,” 369; International Crisis Group, “Tentative Jihad,” 9; Khatib, et al., “Western Policy,” 21.

⁸⁴⁴ Phillips, “Sectarianism,” 370; Desai, “Syrian Revolution,” 17.

⁸⁴⁵ In that, for a Sunni finding himself fighting against an array of Shi’a forces, ‘extremist’ Salafi assertions that the Shi’a are predatory will seem to be reified. See: Daniel Byman, “Sectarianism Afflicts the New Middle East,” *Survival* 56(1) (2014), 87.

⁸⁴⁶ Rich, “Radicalising Syria,”; Desai, “Syrian Revolution,” 16.

- *Faustian bargain* sub-paradigm: The West's failure to adequately arm the 'moderates' or depose al-Assad⁸⁴⁷ forced those 'moderates' to reluctantly, instrumentally embrace the 'extremists' who, though ideologically unsavoury, constituted the only force trained and equipped to protect the population, overthrow the regime, and effectively administer and provide for populations under their control⁸⁴⁸. This was exacerbated by the corruption, abuses, and administrative ineptitude of many 'moderate' factions, which the population contrasted against the 'extremists' who, for their sins, at least shunned corruption and governed justly and effectively⁸⁴⁹. Additionally, many 'moderate' factions superficially 'Islamised' as a means of attracting Gulf funding, only doing so when the West proved unwilling to provide that service⁸⁵⁰.

This overlap appears testament to the insufficiency of extant paradigms to individually explain real world episodes. Additionally, we can identify two further causes for this paradigm 'promiscuity': Firstly, analysts remain subject to the same ideological influences afflicting IV research throughout its history. Secondly, we again encounter the consequences of failing to explicate precise causal mechanisms when making causal attributions (e.g., *ideological persuasion* vs. *post facto rationalisation*, etc.): broad arguments with apparent empirical validity, but lacking explicated causal mechanisms, can promote misguided conclusions. Moreover, this can lead to 'shopping' from various paradigms as a lack of explicated causal mechanisms prompts us to perceive, at face value, trends from each paradigm at play (each analyst interpreting the causal mechanism – often idiosyncratically – without explicating it, thus adding to

⁸⁴⁷ Zelin, "Causes for Pause," 25; Kodmani and Legrand, "Empowering the Democratic Resistance," 4; Lister, *The Syrian Jihad*, 8; Jeffrey and Eisenstadt, *U.S. Military Engagement*, 90; Itani and Rosenblatt, "US Policy in Syria," 1; Khatib, et al., "Western Policy," 9; Van Dam, *Destroying a Nation*, 104; Pierret, "Better Assad," 246.

⁸⁴⁸ Zelin, "Causes for Pause," 25; Baczko, et al., *Civil War*, 189; Kodmani and Legrand, "Empowering the Democratic Resistance," 12; Byman, "Sectarianism," 87; International Crisis Group, "Tentative Jihad," 5; Faysal Itani, "Defeating the Jihadists in Syria: Competition before Confrontation," *Atlantic Council* (Apr. 2015). Available at: https://www.files.ethz.ch/isn/190840/Defeating_the_Jihadists_in_Syria_Competition_before_Confrontation.pdf, 4-6; Mironova, et al., "The Motivations," 15; Yassin-Kassab and al-Shami, *Burning Country*, 127;

⁸⁴⁹ Zelin, "Causes for Pause," 26; Baczko, et al., *Civil War*, 189; Lister, *The Syrian Jihad*, 390; Jeffrey and Eisenstadt, *U.S. Military Engagement*, 90; Khatib, et al., "Western Policy," 16 & 24; Phillips, *The Battle for Syria*, 131; Yassin-Kassab and al-Shami, *Burning Country*, 121.

⁸⁵⁰ Lund, "Syria's Salafi Insurgents," 3; Baczko, et al., *Civil War*, 179-181; Kodmani and Legrand, "Empowering the Democratic Resistance," 4 & 12; Phillips, "Sectarianism," 370; O'Bagy, "Jihad in Syria," 23; International Crisis Group, "Tentative Jihad," 5; Khatib, et al., "Western Policy," 22; Yassin-Kassab and al-Shami, *Burning Country*, 121.

the library of un-explicated causal attributions). While multi-causal explanations are commendable, they require a unified – though nuanced and contingent – paradigm to draw the themes together into an actionable causal understanding. Otherwise, we are left only with seemingly conflicting inputs that explain with one hand what they confuse with the other.

The paradigm crisis was further perpetuated by more idiosyncratic, demoralised responses to the situation. The leading problem was that ‘extremism’ considered by all extant paradigms as a ‘fringe’ phenomenon affecting only the ‘vulnerable’ appeared to be capturing broad swathes of the Syrian and Iraqi populations; an impression bolstered by reported rebel atrocities suggestive that all the rebels were becoming ‘extremists’⁸⁵¹, alongside the dichotomisation of journalistic discourses regarding the secular FSA (depicted in humanising terms)⁸⁵² and the ‘extremists’ (depicted *à la* GWOT IV imaginary)⁸⁵³. Thus, extant paradigm notions that ‘extremism’ affected only the deviant minority could not explain its apparent mainstream appeal among Syrian and Iraqi Sunnis (although its pernicious

⁸⁵¹ 2013 in particular saw a dark change of tone in previously sympathetic press coverage towards the SAOM, see for example: “War crimes a ‘daily reality’ of Syrian civil war, UN says”, *France 24*, dated June 4 2013. Accessed June 3 2020. Available at: <https://www.france24.com/en/20130604-war-crimes-daily-reality-syria-civil-war-un-report>; “Is This the Most Disgusting Atrocity Filmed in the Syrian Civil War?” *Human Rights Watch*, dated May 13 2013. Accessed June 3 2020. Available at: <https://www.hrw.org/news/2013/05/13/most-disgusting-atrocity-filmed-syrian-civil-war>; Ruth Sherlock, “Syrian rebels accused of sectarian murders,” *The Telegraph*, dated August 11 2013. Accessed June 3 2020. Available at: <https://www.telegraph.co.uk/news/worldnews/middleeast/syria/10236362/Syrian-rebels-accused-of-sectarian-murders.html>; Matthew Bell, “Syrian rebel forces are guilty of atrocities, too,” *The World*, dated October 12 2013. Accessed June 3 2020. Available at: <https://www.pri.org/stories/2013-10-11/syrian-rebels-forces-are-guilty-atrocities-too>; S.B., “Rebel atrocities,” *The Economist*, dated October 13 2013. Accessed June 3 2020. Available at: <https://www.economist.com/pomegranate/2013/10/13/rebel-atrocities>; Oliver Holmes, “Syrian rebels killed 190 civilians in August dawn raid: HRW,” *Reuters*, dated October 11 2013. Accessed June 3 2020. Available at: <https://uk.reuters.com/article/us-syria-crisis-killings/syrian-rebels-killed-190-civilians-in-august-dawn-raid-hrw-idUSBRE99A03520131011>; “Syria rebels executed civilians, says Human Rights Watch,” *BBC News*, dated October 11 2013. Accessed June 3 2020. Available at: <https://www.bbc.co.uk/news/world-middle-east-24486627>; Paul Wood, “Face-to-face with Abu Sakkar, Syria’s ‘heart-eating cannibal,’” *BBC News*, dated July 3 2013. Accessed June 3 2020. Available at: <https://www.bbc.co.uk/news/magazine-23190533>

⁸⁵² Journalists implored solidarity with the rebels, publishing human-interest pieces that humanised FSA fighters as a rag-tag citizens’ army of bakers, electricians and shopkeepers backed by conscience-stricken military defectors, whose heroic courage, ingenuity and, above all, humanity, was constantly contrasted against the mechanised inhumanity of the tanks, bombers, and torturers who terrorised them to defend al-Assad’s dictatorship. See, for example: Watson and Razek, “Faces of the Free Syrian Army”; Macleod and Flamand, “Meet the Free Syrian Army”; Nsubuga, “Syrian rebels”; Balkiz and Engel, “The lives of Syrian rebels”; Spencer, “Aleppo ‘is becoming Syria’s Stalingrad’”; Spencer, “Free Syrian Army is all that stands between civilians and tanks”.

⁸⁵³ See for example: McCarthy, “Meet Aleppo’s ‘Moderate,’ ‘Secular’ ‘Rebels’”; Barfi, “America’s Dangerous Gamble”; and Reynolds, “There are No Moderate Syrian Rebels”.

conservative *culturally vulnerable* sub-paradigm apparently could), while the notion of a majority of materially-driven, victims-of-circumstance ‘rational hedgers’ seemed inappropriate amidst the apparently enthusiastic brutality and sectarian zealotry of ‘extremist’ rank-and-file fighters (something that would have seemed far less dissonant had observers considered a civil war lens⁸⁵⁴ rather than a straight ‘moderation’ vs. ‘extremism’ lens).

This both resulted from, and perpetuated, highly-charged debates over the Syrian/Iraqi conflicts’ IV imaginary. On one hand, a *Faustian bargain/global insurgency* imaginary asserted that 1) Islamist factions should not be uniformly branded as ‘extremists’, as considerable differences existed between them⁸⁵⁵; and 2) membership of ‘extremist’ factions should not be considered monolithic, with many joining for instrumental, non-ideological reasons while retaining broadly democratic, pluralistic ideological sentiments⁸⁵⁶. On the other hand, holders of an entrenched GWOT IV imaginary rejected such claims out of hand, dismissing expressions of moderation as ‘obvious’ deceits aimed at fooling the West into providing weaponry⁸⁵⁷, asserting that ‘extremist’ (read: Islamist) factions fighting IS merely wanted to supplant it⁸⁵⁸; and scrambling for evidence to prove their true fealty to the GWOT’s monolithic folk-devil IV imaginary⁸⁵⁹ (as noted in chapter 1). Further, the atrocities and appeal of IS – with its supposedly Islamic motivations and justifications – prompted a popular revolt against the *de*

⁸⁵⁴ Consider *civil war studies* landmark texts like Stathis N. Kalyvas, *The Logic of Violence in Civil War* (New York: Cambridge University Press, 2006).

⁸⁵⁵ To the extent that many had signed covenants explicitly eschewing ‘extremism’ and pledging towards pluralism. See: Lucas, “Syria Document”.

⁸⁵⁶ Usually because 1) they had been alienated by the often corrupt and ‘warlordish’ behaviour of many FSA groups and impressed by the discipline and non-corruptness of Islamist groups (Zelin, “Causes for Pause,” 25; Phillips, *The Battle for Syria*, 131; Khatib, et al., “Western Policy,” 24; Yassin-Kassab and al-Shami, *Burning Country*, 122; and Mironova, et al., “Syria’s Democracy Jihad”); 2) Islamist groups proved significantly better organised, supplied and more effective on the battlefield than their FSA equivalents (Baczko, et al., *Civil War*, 189; Khatib, et al., “Western Policy,” 22; Mironiva, et al., “The motivations,” 15; and Mironova, et al., “Syria’s Democracy Jihad,”); and/or 3) Islamist groups provided better salaries for individuals wishing to provide for their families (Van Dam, *Destroying a Nation*, 99).

⁸⁵⁷ Decina, “Meet Syria’s Fake Moderates”; McCarthy, “Meet Aleppo’s ‘Moderate,’ ‘Secular’ ‘Rebels’”; Cole, “How the Washington Post got taken in”; Abrahms, “Syria’s Extremist Opposition”; and Joscelyn, “Jihadists in Syria”.

⁸⁵⁸ “If the Castle Falls: Exploring the ideology and objectives of the Syrian rebellion,” *Tony Blair Institute for Global Change* (Dec. 2015). <https://institute.global/sites/default/files/inline-files/If%20the%20Castle%20Falls.pdf>, 10.

⁸⁵⁹ Usually by citing decontextualized instances of their military cooperation with perceivably ‘unambiguously extremist’ groups such as IS and Jabhat al-Nuṣra (Decina, “Meet Syria’s Fake Moderates,”; Barfi, “America’s Dangerous Gamble”; Steinberg, “Ahrar al-Sham,” 4; Cole, “How the Washington Post got Taken in,”; and Abrahms, “Syria’s Extremist Opposition,”); or selected ‘extremist’-sounding statements made by particular group members (Hubbard, “In Syria, Potential Ally’s Islamist Ties”).

facto taboo against attributing Islamist IV to Islam or religiosity, both marginally within academia and quite ferociously in the popular press media (as noted in the introduction chapter). This debate became increasingly intertwined with the Wests' ongoing 'Culture Wars', with progressive/hybrid paradigm narratives increasingly championed by the political left and the conservative paradigm – and, in particular, its *culturally-vulnerable* sub-paradigm attributing the violence to Islam itself – championed by an increasingly populist US and European right (see introduction chapter).

3.4.4. Ramifications of the paradigm crisis:

This confusion disoriented and paralysed policymakers and observers, resulting in three contentious, consequential trends that have exacerbated the paradigm crisis yet further:

3.4.4.1. *A shift from theory to 'practical intuitive historicism' in policymaking:* Bereft of firm, sufficient, consensual paradigms for understanding and addressing IV, policymakers have increasingly adopted an idiosyncratic approach akin to Vertzberger's 'practical intuitive historicism'⁸⁶⁰. This approach eschews theory in favour of 'shopping' for historical analogies that might help predict outcomes of policies, the logic being that: "In the past, general category of events 'x' led to general category of outcomes 'y', [...] the same holds true for the current situation"⁸⁶¹ Problematically, these comparisons are not made with appropriate methodological rigour, but rather through "conscious or unconscious techniques for coding, storing and retrieving data [drawn from] [...] a tapestry of fact and fiction [...] a combination of historical facts, mass media reports, national mythologies [...] supported by the person's own imagination and selective memory"⁸⁶². They require assuming that: 1) one understands the causal dynamics of the analogous historical case-study; 2) the historical case is truly analogous to the present case; and 3) that similar outcomes convey similar causes⁸⁶³.

⁸⁶⁰ Vertzberger, "Foreign policy decisionmakers". This tendency has been more recently noted in Robert Crowcroft, "The Case for Applied History," *History Today* 68(9) (Sep., 2018).

⁸⁶¹ Ibid, 227.

⁸⁶² Ibid, 224.

⁸⁶³ Ibid, 226.

Obama repeatedly employed this approach. When deliberating over militarily supporting the SAOM, he was preoccupied by concerns about avoiding another 1980s Afghanistan or 2011 Libya and commissioned a report to ascertain whether militarily supporting rebels “had ever worked in the past”⁸⁶⁴. This broad question, and those choice analogies, were unhelpful because they failed to define the phenomena at hand: what was meant by “worked in the past?” In the case-studies cited by the report⁸⁶⁵ and the analogies cited by Obama and his acolytes, it usually meant “had sponsoring rebels helped win proxy wars/effect regime change” – while the problem at hand was better represented by the questions: “had empowering moderates ever helped marginalise extremists,” or even “have better resourced movements traditionally outcompeted more poorly resourced ones, under circumstances of regime repression/civil war/etc.”. Obama might have been better served by an Iraqi Surge analogy but, absent Petraeus and a few others, few were citing it (another symptom of the ‘new’ COIN crisis). Likewise, Obama’s deliberations over deposing al-Assad were shaped by his reflections on 2003 Iraq and 2011 Libya yet, at least in the former case, this was again inappropriate: Iraq having been stable and peaceful (if tyrannical) prior to the US-led invasion, while Syria was already in a state of war (or, as Hamid notes, Iraq’s civil war began *after* US intervention, Syria’s happened in the *absence* of intervention⁸⁶⁶). Moreover, analogising Iraq encourages a deterministic understanding of causation; viewing the invasion as a Pandora’s box moment that unleashed the jihadist and sectarian menace otherwise safely locked away, rather than a ‘critical juncture’ that facilitated, but did not render inevitable, the following chaos (the Arab uprisings prove that regime change is neither necessary nor sufficient for IV). Obama is rightly criticised for “over-learning” the lessons of Iraq, to the extent it became a ‘syndrome’⁸⁶⁷ through which he viewed, often misleadingly, every foreign policy decision⁸⁶⁸. Even Libya, a closer cousin (at face value), differed significantly from Syria in its social-political fabric, while the chaos following Gaddafi’s fall resulted not merely from the event itself but also

⁸⁶⁴ Glass, “‘Tell me how this ends’,”; Mazzetti, “C.I.A. study of covert aid”.

⁸⁶⁵ While the CIA study remains classified, it is known that the case-selection was broad (an essentially quantitative study of all the cases in which the CIA had trained-and-equipped foreign proxies). It does not appear to have sought to directly to ascertain the effectiveness of empowering ‘moderates’ to marginalise ‘extremists’ (Ibid).

⁸⁶⁶ Hamid, “How Iraq warped Obama’s worldview”.

⁸⁶⁷ À la earlier ‘Vietnam-’, ‘Beirut-’, and ‘Somalia syndromes’.

⁸⁶⁸ Hamid, “How Iraq warped Obama’s worldview”; Tierney, “The Obama Doctrine and the lessons of Iraq”.

from the nature of it, alongside myriad other contributing factors. Thus, the ‘Obamaian method’ fell into the very traps warned of by Vertzberger. As we will see below and in Appendix A, this approach has been mirrored – *en masse* and often even more wildly – by analysts, observers, and pundits.

3.4.4.2. *Intractable debates over the viability of specific CJTF-OIR interventions:*

Specific CJTF-OIR strategic interventions suffered substantial, varied debates, chiefly conditioned by the choice paradigm (or lack thereof) of the belligerents. Notably:

3.4.4.2.1. *Ideology-discrediting:*

As I began to note in Chapter 1, this debate can be split into two sub-debates. In the first, critics acknowledge ideology-discrediting to be a valid intervention, but charge as flawed specific approaches: in particular, scholars question the validity of promoting ‘moderate’ Islam, considering it futile because IS supporters are not motivated by Islam (*obediently violent* sub-paradigm) but rather by psychological factors (*post facto grievance* sub-paradigm) or else are attracted specifically to *violent* Islam (thus *peaceful* Islam will not appeal)⁸⁶⁹. More generally, scholars decry the lack of research (empirical or theoretical) guiding the development of ideology-discrediting interventions, extant efforts being speculative, *ad hoc*, and lacking mechanisms for measuring their success⁸⁷⁰.

In the second sub-debate, critics hold the very concept of ideology-discrediting to be futile/redundant: Generally based on a rejection of conservative paradigm causal attributions, they stress the lack of evidence for the strategy’s foundational assumptions that IV results from *ideological persuasion* (and thus require counter-persuasion), insisting such assumptions are politically rather than methodologically derived⁸⁷¹. Moreover, they warn such interventions may prove

⁸⁶⁹ Watts, “Countering ISIL’s Ideology,” 2; W. J. Hennigan, “How the White House is trying again to counter Islamic State propaganda,” *Los Angeles Times*, dated March 18 2016. Accessed September 17 2019. Available at: <https://www.latimes.com/world/middleeast/la-fg-islamic-state-propaganda-20160318-story.html>; Tobias Gemmerli, “Normalisation campaigns do not prevent radical online cultures: Avoid the pitfalls of counter-narratives,” Policy Brief, *Danish Institute for International Studies* (November 2016), 2; Stern, “Obama and Terrorism”.

⁸⁷⁰ Reed, “An Inconvenient Truth”; Hemmingsen & Castro, *The trouble with counter-narratives*, 6 & 19; Gartenstein-Ross and Barr, “Fixing how we fight”; Beutel, et al., “Field Principles,” 36; Berger, ““Defeating IS Ideology””.

⁸⁷¹ Reed, “An Inconvenient Truth,”; Glazzard, *Losing the Plot*, 1; Hemmingsen & Castro, *The trouble with counter-narratives*, 5; Rosand and Winterbotham, “Do counter-narratives”.

counterproductive; polarising opinion, magnifying IS' appeal (as frantic efforts to oppose it will enhance its image as a world-defying force or a liberating 'truth' the 'corrupt elite' want to hide), and prompt a defensive hardening of 'extremist' views as IS supporters bristle against attack or perceived manipulation⁸⁷².

This lack of consensus extended to those executing CJTF-OIR, with considerable variations in causal understandings and remedial approaches being exhibited by the different agencies involved. Official CJTF-OIR discourse stressed conservative paradigm-derived (predominantly *obediently violent* sub-paradigm) ideology-discrediting interventions focussing on "exposing IS' true nature⁸⁷³"; "Tackling IS' [...] destructive and hateful message⁸⁷⁴"; "exposing the falsehoods that lie at the heart of IS' ideology⁸⁷⁵"; and "exposing IS' delusional and false religious narrative⁸⁷⁶"; while stressing the need to "assist and amplify credible and authentic voices [chiefly 'mainstream' Islamic scholars]"⁸⁷⁷. However, many practitioners adopted progressive/hybrid paradigm-derived movement-discrediting interventions: while disseminating 'mainstream' refutations of IS' interpretation of Islam⁸⁷⁸, most interventions have focussed primarily on discrediting IS as a movement, focussing on damaging its 'brand' rather than its ideas by highlighting its failures (to live up to its self-professed credentials as an unparalleled military force, defender of Sunnis, and administrator of a functioning, pristine *Caliphate*⁸⁷⁹; all claims helping it posture as an agent of

⁸⁷² Reed, "An Inconvenient Truth,," Hemmingsen & Castro, *The trouble with counter-narratives*, 6 & 29; Berger, "Defeating IS Ideology"; Paul Bell, "ISIS and violent extremism: Is the West's counter-narrative making the problem worse?" *Influence*, dated June 25 2015. Accessed September 17 2019. Available at: <https://influenceonline.co.uk/2015/06/25/isis-violent-extremism-vests-counter-narrative-making-problem-worse/>; Gemmerli, "Normalisation campaigns," 2-3; Kathleen Bouzis, "Countering the Islamic State: U.S. Counterterrorism Measures," *Studies in Conflict & Terrorism* 38(10) (2015), 889-890.

⁸⁷³ US Department of State, "The Global Coalition To Defeat ISIS," undated. Accessed August 30 2018. Available at: <https://www.state.gov/s/seci/>

⁸⁷⁴ Mission statement of the Global Coalition.

⁸⁷⁵ Ibid.

⁸⁷⁶ UK Government, "UK action to combat Daesh."

⁸⁷⁷ "Mission statement of the Global Coalition".

⁸⁷⁸ In particular, the prestigious 'mainstream' Sunni religious establishments in Egypt and Saudi Arabia have engaged in an active campaign to discredit IS' ideology on religious grounds: see Ewan Lawson, "The Battle of the Narrative," in *Inherently Unresolved: The Military Operation against ISIS*, eds. Elizabeth Quintana and Jonathan Eyal (London: Royal United Services Institute for Defence and Security Studies, 2015), 32.

⁸⁷⁹ This has involved 1) highlighting IS' failures and reverses; 2) highlighting discrepancies between its claims and realities on the ground; and 3) promoting the testimonies of IS defectors who witnessed the horrors of life on the ground in IS' 'Caliphate'. See: House of Commons Defence Committee, "UK military operations in Syria and Iraq: Second Report"; Counter-Daesh Communications Cell Guest Blogger for FCO Editorial, "Counter Daesh Communications: 1 year

deliverance and empowerment for 'hedging' Sunni Muslims, and even to claim divine favour).

3.4.4.2.2. Empowering 'moderate' Syrian rebels:

This intervention was equally divisive, on several grounds:

Firstly, there were intractable debates over how to delineate 'moderation' from 'extremism', e.g.:

- Secularists vs. Islamists?⁸⁸⁰
- Pluralists vs. Sunni chauvinists?⁸⁸¹
- Commitment to retaining Syria's territorial and sovereign integrity vs. border-abolitionists?⁸⁸²
- Democrats vs. autocrats/theocrats?⁸⁸³
- Political Islamists vs. Jihadist Islamists?⁸⁸⁴
- Local jihadists vs. global jihadists?⁸⁸⁵
- Those who share our interests (rather than our values)?⁸⁸⁶

on," *Foreign and Common Wealth Office Blog*, dated September 26 2016. Accessed September 16 2019. Available at: <https://blogs.fco.gov.uk/fcoeditorial/2016/09/26/counter-daesh-communications-1-year/>; Dan Chugg, "Winning the strategic communications war with Daesh," *Civil Service Quarterly* dated December 20 2017. Accessed September 16 2019. Available at: <https://quarterly.blog.gov.uk/2017/12/20/winning-the-strategic-communications-war-with-daesh/>; Jonathan Owen, "Comms helped defeat Isis in Iraq, claims government counter-propaganda unit," *PR Week*, dated January 17 2018. Accessed September 16 2019. Available at: <https://www.prweek.com/article/1454653/comms-helped-defeat-isis-iraq-claims-government-counter-propaganda-unit>; Ben Smith and Claire Mills, "Syria and Iraq: update July 2017," *House of Commons Library Briefing Paper CBP 8011* (July 2017), 6; Crystal L. McFadden, "Strategic Communications: the State Department versus the Islamic State," *Masters Diss., Naval Postgraduate School, California*, June 2017, 25; and Matthew Levitt, "A Counterterrorism Restructuring That Can't Work Without Funding," *Washington Institute for Near East Policy*, dated January 16 2016. Accessed September 17 2019. Available at: <https://www.washingtoninstitute.org/policy-analysis/view/a-counterterrorism-restructuring-that-cant-work-without-funding>

⁸⁸⁰ Reportedly this has been the main criteria for Western vetting of SAOM fighters taking place at the *Military Operations Commands* (MOC) offices in Jordan and Turkey ("Syria's Armed Opposition," 5). This criterion has been echoed by pundits such as McCarthy, "Meet Aleppo's 'Moderate,' 'Secular' 'Rebels'".

⁸⁸¹ E.g., the UK *Secretary of State for Defence*, the Rt Hon Michael Fallon (quoted in House of Commons Defence Committee, "UK military operations in Syria and Iraq: Second Report," 34). Supporting analysts include: Adam Withnall, "How many 'moderate' ground troops are there in Syria – and are they strong enough to defeat Isis?" *The Independent*, dated December 1 2015. Accessed October 5 2018. Available at: <https://www.independent.co.uk/news/world/middle-east/how-many-moderate-ground-troops-are-there-in-syria-and-are-they-strong-enough-to-defeat-isis-a6756226.html>; Lister, "Yes, there are 70,000 moderate opposition fighters".

⁸⁸² Ibid.

⁸⁸³ Cole, "How the Washington Post got taken in".

⁸⁸⁴ Peter Ford, the former *UK Ambassador to Syria* – quoted in: House of Commons Defence Committee, "UK military operations in Syria and Iraq," 32.

⁸⁸⁵ Nagwan Soliman, "The Door Should Be Opened to Ahrar Al-Sham!" *European University Institute Middle East Directions Issue* 2017(6) (March 2017), 1.

⁸⁸⁶ Barfi, "America's Dangerous Gamble".

- Those with track-records fighting IS?⁸⁸⁷
- Those so significant on the ground as to be essential powerbrokers in the broader peace/political process?⁸⁸⁸

Others argued that such delineations were impractical or invalid; variously because: 1) factions were ideologically-varied in their memberships, with many/most joining for instrumental rather than ideological reasons (thus we cannot feasibly talk about ‘extremist’ or ‘moderate’ groups, only, ‘extremist’ or ‘moderate’ individuals)⁸⁸⁹; or 2) because faction leaders often proved incapable of restraining their more ‘extremist’ members, making them unreliable partners⁸⁹⁰.

These debates were further complicated by several dynamics:

Firstly, a failure to operationalise ‘ideology’ led to intractable disagreements over ideological alignments; particularly in debates over whether *Ahrar al-Sham* [AaS] was ‘moderate’ or ‘extremist’. Both sides cited the group’s perceived ideological similarity⁸⁹¹ (vs. lack thereof⁸⁹²) to JaN/IS to argue their camps. Similarly, one report argued that, of 48 SAOM factions surveyed, 60% were ‘Islamic extremists’ and 33% shared IS’ ideology⁸⁹³ (purely, it seems, on account of seeking to establish some form of Islamic state) – yet the report’s later breakdown of the aims and objectives of these groups revealed a different picture (e.g., only 21% supported global jihad, while 38% supported democracy)⁸⁹⁴.

⁸⁸⁷ Lister, “Yes, there are 70,000 moderate opposition fighters”.

⁸⁸⁸ Ibid; Robert S. Ford and Ali El Yassir, “Yes, Talk with Syria’s Ahrar al-Sham,” *Middle East Institute*, dated July 15 2015. Accessed October 4 2018. Available at: <http://www.mei.edu/content/at/yes-talk-syria%E2%80%99s-ahrar-al-sham>

⁸⁸⁹ Notably former General David Petraeus (quoted in: Josh Rogin, “Petraeus’s Plan to Defeat Islamic State Won’t Work,” *Bloomberg*, dated September 1 2015. Accessed June 4 2020. Available at: <https://www.bloomberg.com/opinion/articles/2015-09-01/petraeus-s-plan-to-defeat-islamic-state-won-t-work>); and analysts such as: Meg Aubrey, et al., “Why young Syrians choose to fight: Vulnerability and resilience to recruitment by violent extremist groups in Syria,” *International Alert* Research Summary (May 2016), 4-5; Mironova, et al., “The Motivations,” 15-16; Safadi, “Don’t rely on Syria’s ‘moderate’ fighting force”.

⁸⁹⁰ Abrahms, “Syria’s Extremist Opposition”.

⁸⁹¹ Steinberg, “Ahrar al-Sham,” 1; Abrahms, “Syria’s Extremist Opposition,”; Michael Jonsson, “Biding Its Time: The Strategic Resilience of Ahrar al-Sham,” *Swedish Defence Research Agency* FOI Memo 5957 (Dec., 2016), 1.

⁸⁹² Mona Alami, “Syria: The Right Salafis Can Make All the Difference,” *Atlantic Council*, dated September 14 2015. Accessed October 3 2018. Available at: <http://www.atlanticcouncil.org/blogs/syriasource/syria-the-right-salafis-can-make-all-the-difference>; Soliman, “The Door Should Be Opened,” 1; Ford and El Yassir, “Yes, Talk with Syria’s Ahrar al-Sham”.

⁸⁹³ “If the Castle Falls,” 6-7.

⁸⁹⁴ Ibid, 10.

Secondly, opposing analysts proposed differing criteria for what evidenced 'extremism'/'moderation'. For example, in the AaS debate, some cited its battlefield collaboration with JaN as evidence of 'extremism'⁸⁹⁵, while others interpreted it as instrumental (due to insufficient resources to fight the regime/IS alone)⁸⁹⁶. Similarly, while some viewed AaS' pledge to respect minorities and a government chosen by the Syrian people as indicative of moderation or pragmatism⁸⁹⁷, others dismissed it as a deceitful charm offensive to acquire Western weapons, doubting the group would honour such pledges were it to come into power⁸⁹⁸.

Equally contentious were debates over whether empowering 'moderate' SAOM factions would marginalise 'extremists'. While supporters cited the *Faustian bargain* sub-paradigm⁸⁹⁹ (Petraeus explicitly analogising Iraq's *Sunni Awakening*⁹⁰⁰), others were wary (especially when Petraeus advocated that such a strategy could 'turn' JaN's 'moderate' elements⁹⁰¹). Sceptics argued that:

⁸⁹⁵ Decina, "Meet Syria's Fake Moderates"; McCarthy, "Meet Aleppo's 'Moderate,' 'Secular' 'Rebels'"; Barfi, "America's Dangerous Gamble"; Steinberg, "Ahrar al-Sham," 4; Cole, "How the Washington Post got taken in"; Abrahms, "Syria's Extremist Opposition,,"; Joscelyn, "Jihadists in Syria".

⁸⁹⁶ Ford, "Testimony".

⁸⁹⁷ Charles Lister, "Are Syrian Islamists moving to counterbalance Al-Qaeda? Will it last?" *Brookings*, dated March 23 2015. Accessed October 6 2019. Available at: <https://www.brookings.edu/blog/markaz/2015/03/23/are-syrian-islamists-moving-to-counterbalance-al-qaeda-will-it-last/>; Colin P. Clarke, "The Moderate Face of Al Qaeda," *Foreign Affairs*, dated October 24 2017. Accessed October 5 2018. Available at: <https://www.foreignaffairs.com/articles/syria/2017-10-24/moderate-face-al-qaeda>; Alami, "Syria: The Right Salafis".

⁸⁹⁸ Decina, "Meet Syria's Fake Moderates"; McCarthy, "Meet Aleppo's 'Moderate,' 'Secular' 'Rebels'"; Steinberg, "Ahrar al-Sham," 5; Cole, "How the Washington Post got taken in by"; Marc Lynch, "Would arming Syria's rebels have stopped the Islamic State?" *The Washington Post*, dated August 11 2014. Accessed November 9 2019. Available at: <https://www.washingtonpost.com/news/monkey-cage/wp/2014/08/11/would-arming-syrias-rebels-have-stopped-the-islamic-state/?arc404=true>

⁸⁹⁹ Arguing variously that 1) an inclusive attitude towards ideologically-hedging Islamists such as AaS will give leverage to moderating elements within those factions, while weakening the discourses of their 'extremist' elements through a display of good will, reliability, and openness to political Islam (Alami, "Syria: The Right Salafis"; Soliman, "The Door Should Be Opened"); 2) providing 'moderate' factions with money to pay salaries alongside reliable supplies of food, medicine, ammunition etc. would enable them to outbid 'extremist' factions like JAN for the instrumental loyalties of Syrian fighters (Ford, "Arm Syria's Opposition"); and 3) by empowering a 'moderate' pluralistic SAOM, reluctant supporters of Assad (those minorities who had sided with him through fear of the 'extremists') would feel safe enough to break their Faustian bargain with the regime and embrace a transition (Ford, "Testimony").

⁹⁰⁰ Petraeus referred as precedent to the success of the Iraqi Surge campaign in which "Sunni tribes and insurgent groups that were previously aligned with AQI (al Qaeda in Iraq) switched sides because they concluded that there was a better alternative" (quoted in Rogin, "Petraeus's Plan").

⁹⁰¹ Petraeus asserted that "some individual fighters, and perhaps some elements, within Nusra today have undoubtedly joined for opportunistic rather than ideological reasons: they saw Nusra

- 1) Syrian rebels had become too alienated by previous Western inaction/backtracking to trust/embrace them⁹⁰²;
- 2) The Iraqi *Sunni Awakening* analogy was misplaced/misleading, having resulted more from AQI's transgressions against the tribes' economic interests than from ideological objections⁹⁰³;
- 3) Those assessing the 'moderate' SAOM to be a fiction perceived that such programmes would only empower one set of 'extremists' against another⁹⁰⁴;
- 4) Some questioned whether Faustian bargain-breaking military aid was sufficient to swing Syrian support in favour of 'moderate' factions, given that support for the 'extremists' was also predicated on their relative lack of corruption, etc., vis-à-vis 'moderate' factions⁹⁰⁵;
- 5) It could work, but *only* if empowered factions were permitted to fight al-Assad as well as IS. A demonstrated ability to defeat regime forces was essential to both breaking the Faustian bargain and burnishing their legitimacy as revolutionaries representing the Syrian people, rather than US mercenaries serving foreign agendas⁹⁰⁶.
- 6) Finally, others, more impulsively, simply balked at the idea of empowering 'extremists' (broadly defined) full stop⁹⁰⁷.

Again, the discussion was furthered mired by broader discussions over the wisdom of injecting arms into a civil war. Again citing 1980s Afghanistan⁹⁰⁸, 2011

as a strong horse, and they haven't seen a credible alternative, as the moderate opposition has yet to be adequately resourced" and that the US should try "splintering [Al Nusra's] ranks by offering a credible alternative to those 'reconcilable' elements of those organizations" (quoted in: Nancy A. Youssef and Shane Harris, "Deal with the Devils: Petraeus: Use al Qaeda fighters to beat ISIS," *The Daily Beast*, dated August 31 2015. Accessed October 5 2018. Available at: <https://www.thedailybeast.com/petraeus-use-al-qaeda-fighters-to-beat-isis?ref=scroll>).

⁹⁰² Rogin, "Petraeus's Plan".

⁹⁰³ Barfi, "America's Dangerous Gamble".

⁹⁰⁴ McCarthy, "Meet Aleppo's 'Moderate,' 'Secular' 'Rebels'".

⁹⁰⁵ Phillips, *The Battle for Syria*, 145/

⁹⁰⁶ Itani, "Defeating the Jihadists", 3; Hassan Hassan, "Iraq isn't the right front," *Foreign Affairs*, dated March 29 2015. Accessed December 29 2019. Available at: <https://www.foreignaffairs.com/articles/iraq/2015-03-29/iraq-isnt-right-front>

⁹⁰⁷ Trevor Timm, "David Petraeus' bright idea: give terrorists weapons to beat terrorists," *The Guardian*, dated September 2 2015. Accessed October 9 2018. Available at: <https://www.theguardian.com/commentisfree/2015/sep/02/david-petraeus-bright-idea-give-terrorists-weapons-to-beat-isis>; Tim Canova, "Tulsi's Right: We Must Stop Arming Terrorists," *Medium*, dated July 25 2017. Accessed June 15 2020. Available at: <https://medium.com/@Tim.Canova/tulsis-right-we-must-stop-arming-terrorists-dfad27f912c>

⁹⁰⁸ Kevin Schwartz, "Syrian Civil War: US should not arm the rebels," *al Jazeera*, dated April 4 2016. Accessed November 9 2019. Available at: <https://www.aljazeera.com/indepth/opinion/2016/04/syrian-civil-war-arm-rebels-160403113531178.html>; Lawrence B. Wilkerson, "Arming Syrian 'Moderate' Fighters Emboldens

Libya⁹⁰⁹, and even British support for Spanish partisans during the Napoleonic Wars⁹¹⁰ as cautionary tales, commentators warned that such actions would prolong rather than end the conflict, while complicating post-war DDR and peacebuilding⁹¹¹. While valid warnings, they belong to a separate discussion and, much like Obama's musings on the topic, needed to be explicated as such to avoid further confusion.

3.4.4.3. A 'anarchic turn' in causal attributions:

Disoriented by over a decade of discursive mixed messaging, disillusioned by the GWOT's failures and unexpected blowbacks, and appalled and frightened by IS' brutality and unpredictable terrorist attacks, responses to IS were idiosyncratic, unmoored from grounding paradigms (all of which seemed incapable of explaining the phenomenon). This 'anarchic turn' has been characterised by four idiosyncratic approaches, none of which satisfy normal criteria for social-scientific investigation:

- 1) '*Practical intuitive historicism*': As noted, this macroscopic approach involves identifying apparent similarities between IS and historical case-studies, and fleshing out those understandings by assuming additional parallels and building remedial strategies accordingly. E.g., suggested similarities between the IS phenomenon and the European *Wars of Religion/Reformation*⁹¹²; or early 20th century fascist

Islamic State," *The Huffington Post*, dated September 17 2014 (updated November 17 2014). Accessed November 9 2019. https://www.huffpost.com/entry/arming-syrian-moderates_b_5835546; Ben Hubbard, et al., "U.S. Pins Hope on Syrian Rebels with Loyalties All Over the Map," *The New York Times*, dated September 11 2014. Accessed October 5 2018. Available at: <https://www.nytimes.com/2014/09/12/world/middleeast/us-pins-hope-on-syrian-rebels-with-loyalties-all-over-the-map.html>; Timm, "David Petraeus' bright idea".

⁹⁰⁹ Pete Hoekstra, "Arming 'moderates': a cautionary tale," *The Washington Examiner*, dated September 17 2014. Accessed November 19 2019. Available at: <https://www.washingtonexaminer.com/arming-moderates-a-cautionary-tale>; Hubbard, et al., "U.S. Pins Hope on Syrian Rebels".

⁹¹⁰ Scheipers, "Auxiliaries," 124.

⁹¹¹ Trevor Timm, "The US decision to send weapons to Syria repeats a historical mistake," *The Guardian*, dated September 19 2015. Accessed November 9 2019. Available at: <https://www.theguardian.com/commentisfree/2015/sep/19/us-weapons-to-syria-repeats-historical-mistake> Lynch, "Would arming Syria's rebels".

⁹¹² Postulated parallels include: 1) influence of austere religious belief systems (Calvinism/Anabaptism vs. Wahhabism); 2) ethos on religious purity/dichotomy between the 'damned' and the 'elect'; 3) proscribing of pleasures and luxuries (Calvinist proscribing dancing, singing, drinking, gaming, bright clothes, lewd language, IS proscribing music, dancing, smoking, play cards, images of living beings, etc); 4) brutal treatment of religious outsiders; 5) iconoclastic destruction; 6) influence of underlying geopolitical dynamics and proxy warfare; 7) deep historical roots to the conflict, based around unresolved questions of religious freedom; 8) systematic dehumanisation of religious outsiders; 9) subjugation and objectification of women; 10) attempted

movements⁹¹³; historical insights about the follies of attempting to crush revolutions kinetically⁹¹⁴, etc. While such an approach can be tentatively beneficial in that “the past is our sole repository of information about what works and what does not [...] [and] offers deeper insights into the human condition”⁹¹⁵ it runs many risks associated with identifying sufficiently accurate analogies, avoiding oversimplification, avoiding imputing erroneous assumptions, parallels, and conclusions⁹¹⁶, alongside the broader issues identified by

resurrection of ancient polities (IS and the Caliphate, Munster Anabaptists and Davidic Israel); 11) apocalyptic expectations, etc. See: Andreas Whittam Smith, “To fight ISIS we need to learn from the era of Calvinism,” *The Independent*, dated December 16 2015. Accessed December 8 2019. Available at: <https://www.independent.co.uk/voices/to-fight-isis-we-need-to-learn-from-the-era-of-calvinism-a6775841.html>; David Batashvili, “Syria’s Thirty Years’ War,” *Forbes*, dated November 29 2016. Accessed December 5 2019. Available at: <https://www.forbes.com/sites/realspin/2016/11/29/syrias-thirty-years-war/#168921672373>; Marc Tyrrell, “From Magdeburg to Mosul: Iraq, Syria, and the 30 Years War,” *War on the Rocks*, dated July 2 2014. Accessed December 8 2019. Available at: <https://warontherocks.com/2014/07/from-magdeburg-to-mosul-iraq-syria-and-the-30-years-war/>; Malise Ruthven, “Middle Eastern echoes of the religious conflicts that remade Europe,” *Financial Times*, dated October 22 2015. Accessed December 8 2019. Available at: <https://www.ft.com/content/40c984a4-5e28-11e5-9846-de406ccb37f2>; Brendan Simms, et al., “Ending the new Thirty Years War,” *New Statesman*, dated January 26 2016. Accessed December 8 2019. Available at: <https://www.newstatesman.com/politics/uk/2016/01/ending-new-thirty-years-war>; Kate Maltby, “Like ISIS, Thomas More believed passionately in burning people alive,” *The Spectator*, dated February 19 2015. Accessed December 12 2019. Available at: <https://blogs.spectator.co.uk/2015/02/like-isis-thomas-more-believed-passionately-in-burning-people-alive/>; Ed Simon, “ISIS is the Islamic ‘Reformation’,” *Religion Dispatches*, dated March 3 2015. Accessed December 12 2019. Available at: <http://religiondispatches.org/isis-is-the-islamic-reformation/>; Boria Sax, “The Islamic State, the Münster Rebellion, and the Apocalypse,” *Huffington Post*, dated February 25 2015 (Updated December 6 2017). Accessed December 12 2019. Available at: https://www.huffpost.com/entry/the-islamic-state-the-mue_b_6748368

⁹¹³ Postulated parallels include: 1) alleged similarities between IS’ forced marriages/sex slavery and Nazi ‘joy divisions’/Imperial Japanese ‘comfort women’; 2) anti-Semitic ideological narratives; 3) militarisation and indoctrination of children into paramilitary groups; 4) crafting of personality cults of leaders; 5) militarisation of society; 6) appealing to disenfranchised middle classes; 7) glorification of violent heroism, etc. See: Stephen Sheehi, “ISIS as a fascist movement,” *Mondoweiss*, dated November 18 2015. Accessed January 9 2020. Available at: <https://mondoweiss.net/2015/11/isis-fascist-movement/>; William Spach, “The Fascist Caliphate: How the Islamic State mirrored Fascist political tactics through appealing to a relatively deprived middle class,” *Small Wars Journal*, undated. Accessed January 9 2020. Available at: <https://smallwarsjournal.com/jrnl/art/fascist-caliphate-how-islamic-state-mirrored-fascist-political-tactics-through-appealing>

⁹¹⁴ Warning that attempts to militarily crush IS’ revolution may only strengthen the movement’s hardliners and radicalise the moderates, as happened when Austria and Prussia attempted to crush the nascent *French Republic* in 1792, or when Saddam Hussein attempted to derail Iran’s nascent *Islamic Republic*. Similarly, both the *Bolsheviks* and Mao’s *Chinese Communist Party* leveraged foreign aggression to mobilise support and consolidate power. See: Walt, “ISIS as Revolutionary State”.

⁹¹⁵ Crowcroft, “The Case for Applied History.”

⁹¹⁶ *Ibid.*

Vertzberger⁹¹⁷. The number of competing analogies cited – and debates over their validity⁹¹⁸ – is testament to this.

- 2) *Mono-causal historicism*: this macroscopic approach involves identifying individual causal antecedents and attempting to trace forward IS' rise from it; e.g., claims IS was set in motion by the colonial re-mapping of the former-Ottoman Empire⁹¹⁹; Saudi Arabia's

⁹¹⁷ Outlined above.

⁹¹⁸ See Appendix A.

⁹¹⁹ M.E. McMillan, *From the First World War to the Arab Spring: What's really going on in the Middle East?* (Basingstoke: Palgrave Macmillan, 2016), 65; Keiko Sakai, "ISIS and Sectarianism as a Result of a Meltdown of the Regional Orders in the Middle East," *International Relations and Diplomacy* 3(4) (2015): pp. 265-278; Yassamine Mather, "The Fall of the Ottoman Empire and Current Conflict in the Middle East," *Critique* 42(3) (2014): pp. 471-485; Sumaia N. Masoom, "A Colonial Catalyst: Reverberations of the Sykes-Picot Agreement in the Rise of ISIS," *Inquiries Journal* 8(11) (2016); Vali R. Nasser, "A Crisis a Century in the Making," *The New York Times*, dated August 10 2014. Accessed June 27 2018. Available at: <https://www.nytimes.com/2014/08/11/opinion/a-crisis-a-century-in-the-making.html>; "Sykes-Picot and its aftermath: Unintended consequences," *The Economist*, dated May 14 2016. Accessed June 27 2018. Available at: <https://www.economist.com/special-report/2016/05/12/unintended-consequences>; Robin Wright, "How the Curse of Sykes-Picot still haunts the Middle East," *The New Yorker*, dated April 30 2016. Accessed June 24 2018. Available at: <https://www.newyorker.com/news/news-desk/how-the-curse-of-sykes-picot-still-haunts-the-middle-east>; Aaron W. Hughes, "The Sykes-Picot Agreement and the making of the modern Middle East," *The Conversation*, dated May 12 2016. Accessed June 24 2018. Available at: <https://theconversation.com/the-sykes-picot-agreement-and-the-making-of-the-modern-middle-east-58780>; Jeffrey D. Sachs, "The Middle East: Contradictory promises that led to a century of conflict," *The Boston Globe*, dated February 19 2017. Accessed June 24 2018. Available at: <https://www.bostonglobe.com/opinion/2017/02/19/the-middle-east-contradictory-promises-that-led-century-conflict/JZ7Rk1GMwJR3PELFdmRAM/story.html>; James Renton, "The post-colonial caliphate: Islamic State and the memory of Sykes-Picot," *The Conversation*, dated February 23 2016. Accessed June 24 2018. Available at: <https://theconversation.com/the-post-colonial-caliphate-islamic-state-and-the-memory-of-sykes-picot-52655>; and Noah Bassil, "Islamic State knows its history; to defeat it, we must know ours," *The Conversation*, dated November 9 2014. Accessed June 24 2018. Available at: <https://theconversation.com/islamic-state-knows-its-history-to-defeat-it-we-must-know-ours-31417>

international exporting of Wahhabism⁹²⁰; or the 2003 Iraq war⁹²¹. Such explanations lack nuance and are overly-deterministic⁹²² (e.g.,

⁹²⁰ Lincoln Clapper, "Wahhabism, ISIS, and the Saudi Connection," *Geopolitical Monitor*, dated January 31 2016. Accessed December 9 2019. Available at: <https://www.geopoliticalmonitor.com/wahhabism-isis-and-the-saudi-connection/>; Samer Abboud, "The only way to take on ISIS is to take on Wahhabi doctrine," *Mondoweiss*, dated November 23 2015. Accessed December 9 2019. Available at: <https://mondoweiss.net/2015/11/isis-wahhabi-doctrine/>; Jennifer Williams, "The Saudi Arabia problem: why a country at war with jihadists also fuels them," *Vox*, dated December 1 2015. Accessed December 9 2019. Available at: <https://www.vox.com/2015/12/1/9821466/saudi-problem-isis>; Nassim Nicholas Taleb, "The Saudi Wahhabis are the real foe," *Politico*, dated November 16 2015. Accessed December 9 2019. Available at: <https://www.politico.eu/article/the-saudi-wahhabis-are-the-real-foe-islamic-terrorists-salafi-violence/>; Ed Husain, "Saudis must stop exporting extremism," *The New York Times*, dated August 22 2014. Accessed December 20 2019. Available at: <https://www.nytimes.com/2014/08/23/opinion/isis-atrocities-started-with-saudi-support-for-salafi-hate.html?searchResultPosition=341>; Thomas L. Friedman, "Our radical Islamist BFF, Saudi Arabia," *The New York Times*, dated September 2 2015. Accessed December 20 2019. Available at: <https://www.nytimes.com/2015/09/02/opinion/thomas-friedman-our-radical-islamic-bff-saudi-arabia.html?searchResultPosition=98>; Yousaf Butt, "How Saudi Wahhabism Is the Fountainhead of Islamist Terrorism," *Huffington Post*, dated January 20 2015 (Updated March 22 2015). Accessed December 20 2019. Available at: https://www.huffpost.com/entry/saudi-wahhabism-islam-terrorism_b_6501916; Karen Armstrong, "Wahhabism to ISIS: how Saudi Arabia exported the main source of global terrorism," *New Statesman*, dated November 27 2014. Accessed December 29 2019. Available at: <https://www.newstatesman.com/world-affairs/2014/11/wahhabism-isis-how-saudi-arabia-exported-main-source-global-terrorism>

⁹²¹ Mehdi Hasan and Dina Sayedahmed, "Blowback: How ISIS was created by the U.S. invasion of Iraq," *The Intercept*, dated January 29 2018. Accessed December 8 2019. Available at: <https://theintercept.com/2018/01/29/isis-iraq-war-islamic-state-blowback/>; Martin Chulov, "Tony Blair is right: without the Iraq war there would be no Islamic State," *The Guardian*, dated October 25 2015. Accessed December 8 2019. Available at: <https://www.theguardian.com/world/2015/oct/25/tony-blair-is-right-without-the-iraq-war-there-would-be-no-isis>; Martin Chulov, "ISIS: the inside story," *The Guardian*, dated December 11 2014. Accessed December 28 2019. Available at: <https://www.theguardian.com/world/2014/dec/11/sp-isis-the-inside-story>; Tallha Abdulrazaq, "Invasion of Iraq: The original sin of the 21st century," *al Jazeera*, dated March 20 2018. Accessed December 8 2019. Available at: <https://www.aljazeera.com/indepth/opinion/invasion-iraq-original-sin-21st-century-180320095532244.html>; John Gray, "ISIS: an apocalyptic cult carving a place in the modern world," *The Guardian*, dated August 26 2014. Accessed December 12 2019. Available at: <https://www.theguardian.com/commentisfree/2014/aug/26/isis-apocalyptic-cult-carving-place-in-modern-world>; Robert D. Kaplan, "ISIS and the logic of anarchy," *The National Interest*, dated November 17 2015. Accessed December 22 2019. Available at: <https://nationalinterest.org/feature/isis-the-logic-anarchy-14367>; Robert Manne, "The mind of the Islamic State," *The Monthly*, dated June 2016. Accessed January 4 2020. Available at: <https://www.themonthly.com.au/issue/2016/june/1464703200/robert-manne/mind-islamic-state>; Shiraz Maher, "Syria's war without end," *New Statesman*, dated October 16 2019. Accessed January 19 2020. Available at: <https://www.newstatesman.com/world/middle-east/2019/10/syria-s-war-without-end>; Andrew Thompson and Jeremi Suri, "How America helped ISIS," *The New York Times*, dated October 1 2014. Accessed December 20 2019. Available at: <https://www.nytimes.com/2014/10/02/opinion/how-america-helped-isis.html?searchResultPosition=158>; Richard Norton-Taylor, "A Thirty Years War In Iraq and Syria?" *The Guardian*, dated June 11 2014. Accessed December 8 2019. Available at: <https://www.theguardian.com/world/defence-and-security-blog/2014/jun/11/iraq-syria-afghanistan-islamists>; Mark Thompson, "How disbanding the Iraqi Army fuelled ISIS," *Time*, dated May 29 2015. Accessed December 8 2019. Available at: <https://time.com/3900753/isis-iraq-syria-army-united-states-military/>

⁹²² As noted in: Clemens Hoffmann and Kamran Matin, "Introduction to War, revolt and rupture: The historical sociology of the current crisis in the Middle East," *Journal of Historical Sociology* 31(1) (Mar., 2018), 4; Toby Dodge, "The Danger of Analogical Myths: Explaining the power and consequences of the Sykes-Picot Delusion," *Symposium on the many lives and legacies of Sykes-Picot* (2016), 135; and James L. Gelvin, "Obsession with Sykes-Picot says more about

asserting IS would never have risen absent the invasion of Iraq and, once Saddam had been deposed, IS' rise became inevitable⁹²³) and overstate certain variables to the effect of obscuring other ones⁹²⁴. Moreover, this approach often focuses as much on attributing blame (e.g., George Bush/Tony Blair must be held accountable) than constructing holistic causal understandings conducive to promoting sound remedial strategies⁹²⁵.

- 3) *Ahistorical presentism*: This microscopic approach draws on conservative theory tropes and/or speculative micro-centric observations to suggest what attracts individuals to join IS (e.g., self-actualisation⁹²⁶, community/belonging⁹²⁷ (theory); sadism⁹²⁸,

what we think of Arabs than history," *The Conversation*, dated May 12 2016. Accessed June 24 2018. Available at: <https://theconversation.com/obsession-with-sykes-picot-says-more-about-what-we-think-of-arabs-than-history-58775>

⁹²³ Notable examples include: Hasan and Sayedahmed's assertion that "Had it not been for Bush's catastrophic decision to invade and occupy Iraq in 2003 [...] the world's most feared terrorist group would not exist today" (Hasan and Sayedahmed, "Blowback"); Chulov's assertion that "without the Iraq war there would be no Islamic State" (Chulov, "Tony Blair is right"); and Gray's claim that "By dismantling Saddam's regime the west broke the Iraqi state. There were no jihadist groups operating in Iraq before regime change [...] the same is true in Libya" (Gray, "ISIS").

⁹²⁴ As noted in: Hoffmann and Matin, "Introduction to War, revolt and rupture," 4; Kamran Matin, "Lineages of the Islamic State: An international historical sociology of State (de-)formation in Iraq," *Journal of Historical Sociology* 31(1) (Mar., 2018); 7; and Roula Khalaf, "Colonial powers did not set the Middle East ablaze," *Financial Times*, dated June 29 2014. Accessed June 24 2018. Available at: <https://www.ft.com/content/86c958c2-ff78-11e3-8a35-00144feab7de>

⁹²⁵ As noted by Howorth in his critique of debates over the complicity of colonialism in IS' rise. See: Jolyon Howorth, "Explainer: why a century-old deal between Britain and France got ISIS jihadis excited," *The Conversation*, dated July 2 2014. Accessed June 24 2018. Available at: <https://theconversation.com/explainer-why-a-century-old-deal-between-britain-and-france-got-isis-jihadis-excited-28643>

⁹²⁶ Edoardo Tolis, "Investigating the influence of ISIS radicalisation on the recruitment process: a critical analysis," *Journal of Policing, Intelligence and Counter Terrorism* 14(2) (2019), 141; Audrey Kurth Cronin, "ISIS Is Not a Terrorist Group: Why Counterterrorism Won't Stop the Latest Jihadist Threat," *Foreign Affairs* 94(2) (Mar./Apr., 2015), 94; Imam Mohamed Magid, "How to Beat ISIS: Counter Recruitment of Young People," *The New York Times*, dated November 17 2015. Accessed December 29 2019. Available at: <https://www.nytimes.com/2015/11/18/world/middleeast/how-to-beat-isis-counter-recruitment-of-young-people.html?searchResultPosition=6>.

⁹²⁷ Jennifer Dhanaraj, "Evolution of the Islamic State after its territorial defeat," *Counter Terrorist Trends and Analyses* 10(5) (May, 2018), 1; Droogan and Peattie, "Mapping," 617; Chassman, "Islamic State," 209.

⁹²⁸ Max Fisher, "The real ideology driving ISIS isn't Islam or caliphate revivalism: it's ultraviolence," *Vox*, dated October 6 2014. Accessed December 12 2019. Available at: <https://www.vox.com/2014/10/6/6905363/isis-truth-ideology-ultraviolence>; George Packer, "Why ISIS murdered Kenji Goto," *The New Yorker*, dated February 3 2015. Accessed December 12 2019. Available at: <https://www.newyorker.com/news/daily-comment/isis-murdered-kenji-goto>; Barry R. Posen, "Contain ISIS," *The Atlantic*, dated November 20 2015. Accessed December 20 2019. Available at: <https://www.theatlantic.com/international/archive/2015/11/isis-syria-iraq-containment/416799/>; "The fundamental horror of ISIS," *The New York Times*, dated October 2 2014. Accessed December 20 2019. Available at: <https://www.nytimes.com/2014/10/03/opinion/the-fundamental-horror-of->

nihilism⁹²⁹, sexual depravity⁹³⁰ (speculative observations), etc). Essentially imposing conservative paradigm tropes speculatively upon IS fighters, it tends to blanketly explain the behaviour/motivations of all IS fighters monolithically; often fixating on certain – often dramatic yet relatively insignificant - variables at the expense of others. Moreover, as a conservative paradigm approach, it is problematically ahistorical, unable to explain why IS has popularised now rather than at any other time.

- 4) *Speculative theorising*: encapsulates a range of (usually microscopic) approaches, ranging from analysing literature, mythology, psychology, philosophy, and past political writings and episodes to try to access the mindset of the IV perpetrator⁹³¹, to idiosyncratic attempts to explain what seems so unhuman as to be inexplicable (e.g., reducing IS'

[isis.html?searchResultPosition=138](https://www.politico.com/magazine/story/2015/11/the-islamic-state-paradox-213368); Jessica Stern, "The Islamic State Paradox," *Politico*, dated November 17 2015. Accessed December 29 2019. Available at: <https://www.politico.com/magazine/story/2015/11/the-islamic-state-paradox-213368>

⁹²⁹ Olivier Roy, "Who are the new jihadis?" *The Guardian*, dated April 13 2017. Accessed December 11 2019. Available at: <https://www.theguardian.com/news/2017/apr/13/who-are-the-new-jihadis>; Milena Rampoldi, "'God is Dead': Terrorism, ISIS & Islamic Nihilism," *Mint Press News*, dated July 7 2016. Accessed January 9 2020. Available at: <https://www.mintpressnews.com/MyMPN/god-dead-terrorism-isis-islamic-nihilism/>; Kenan Malik, "Radical Islam, nihilist rage," *The New York Times*, dated January 3 2015. Accessed December 20 2019. Available at: <https://www.nytimes.com/2015/01/04/opinion/sunday/kenan-malik-the-nihilist-rage-of-radical-islam.html?searchResultPosition=564>

⁹³⁰ Mark Townsend, "Rape and slavery was lure for UK Isis recruits with history of sexual violence," *The Guardian*, dated October 7 2017. Accessed December 10 2019. Available at: <https://www.theguardian.com/world/2017/oct/07/isis-rape-slavery-british-recruits-islamic-state>; Lizzie Dearden, "Isis among terrorist groups using slaves to recruit rapists and domestic abusers," *The Independent*, dated October 9 2017. Accessed December 10 2019. Available at: <https://www.independent.co.uk/news/world/middle-east/isis-sex-slaves-yazidi-recruit-fund-terrorism-trafficking-boko-haram-report-hjs-libya-syria-iraq-a7991366.html>; Sirin Kale, "How terrorist groups like ISIS use sexual violence to lure recruits," *Vice*, dated October 11 2017. Accessed December 10 2019. Available at: https://www.vice.com/en_asia/article/mb7yga/how-terrorist-groups-like-isis-use-sexual-violence-to-lure-recruits; Matthew Hilburn, "IS militants use sex to lure recruits," *VOA News*, dated December 20 2014. Accessed December 10 2019. Available at: <https://www.voanews.com/world-news/middle-east-dont-use/militants-use-sex-lure-recruits>; Pamela Engel, "ISIS is recruiting in the most perverse way imaginable," *Business Insider*, dated August 13 2015. Accessed December 10 2019. Available at: <https://www.businessinsider.com/isis-is-recruiting-in-the-most-perverse-way-imaginable-2015-8?r=US&IR=T>.

⁹³¹ Mishra's exhaustive exploration in *Age of Anger* is a particularly compelling, if flawed, example of such a work (Mishra, *Age of Anger*, summarised in: Pankaj Mishra, "How to think about Islamic State," *The Guardian*, dated July 24 2015. Accessed December 28 2019. Available at: <https://www.theguardian.com/books/2015/jul/24/how-to-think-about-islamic-state>

brutality to sociopathy⁹³²; nihilism⁹³³; or sadism⁹³⁴). At its best, this approach can humanise the IV perpetrator (helping to denaturalise monolithic, two-dimensional folk-devil caricatures), while, at its worst, doing the opposite. However, it risks drawing false or unsubstantiated analogies (e.g., are IS fighters truly analogous to *fin de siècle* Russian anarchists?⁹³⁵), from inappropriate or fallible narratives (e.g., can Dostoyevsky's *Crime and Punishment* really reveal the IS mindset?⁹³⁶), leading to erroneous conclusions (e.g., are IS fighters really propelled by a Nietzschean sense of *ressentiment*?⁹³⁷); tarring all perpetrators with the same brush as its most spectacular or interesting individuals (e.g., are all IS fighters really in the grips of nihilistic anomie, or are other dynamics more often at play?⁹³⁸); and/or being too emotionally-driven in its analyses.

These diverging approaches have perpetuated a lack of consensus both over what IS is, why it behaves the way it does, where it came from, and, based on those answers, how it can be defeated, with every argument made being readily challenged by others (see my breakdown of these proposals and debates in *Appendix A*). This is further perpetuated by the dynamics of commentary which – due to the time-sensitive and sensationalist nature of IS – generally takes place in popular media rather than academic journals⁹³⁹. A media cycle can be discerned (most apparent in *Appendix A*), in which each new theory on IS sparks a fresh round of debates, with each publication competitively deploying its resident experts (credible or self-appointed) to present, embellish, one-up, or refute each emerging claim. With each such brawl, the malaise, and the anarchy, grows only deeper.

⁹³² Tyrrell, “From Magdeburg to Mosul”; “How to fight ISIS,” *The New York Times*, dated November 17 2015. Accessed December 20 2019. Available at: <https://www.nytimes.com/2015/11/18/opinion/how-to-fight-isis.html?searchResultPosition=16>

⁹³³ Roy, “Who are the new jihadis?”; Malik, “Radical Islam, nihilist rage,”; Rampoldi, “God is Dead”.

⁹³⁴ Fisher, “The real ideology driving ISIS”; “The fundamental horror of ISIS”.

⁹³⁵ See the arguments made throughout Mishra, *Age of Anger*.

⁹³⁶ *Ibid.*

⁹³⁷ *Ibid.*

⁹³⁸ *Ibid.*

⁹³⁹ As has become apparent in the footnotes (more so in the footnotes of *Appendix A*), whereby many commentators are seasoned academics contributing to debates waged across mainstream media.

3.5. Conclusion:

This chapter completes my discussion on the methodologically-shaky foundational assumptions of extant understandings of IV, showing how these understandings have become only more confused over time – product of the confused discursive construction of the GWOT and later IS threat, and the clumsy amalgamation of extant understandings formulated to cater for it. Additionally, I have highlighted the issues wrought by the failure to explicate and differentiate key terms (e.g., “ideological-motivation”) and mechanisms (e.g., *ideological persuasion* vs. *post facto rationalisation*) and the dangers and difficulties associated with attempting to comprehend and confront IV threats absent consensual guiding paradigms. These findings emphasise the need for a new, methodologically-grounded ‘third’ IV paradigm, and help identify what such a paradigm must avoid and achieve. It is this undertaking that I now turn to in Part II of the study.

Chapter 4: Towards a new paradigm: proposal for a comparative historical approach:

4.

Having problematised extant approaches to studying IV in Part I, the chapters of Part II propose and demonstrate how CHA can contribute towards constructing a more methodologically-rigorous new paradigm that can be used both to premise further research and to integrate, re-interpret, resituate, and delimit findings from extant studies. This chapter outlines this proposed CHA approach. Specifically:

Section 4.1. outlines the requirements of a new paradigm by summarising the lessons learned in Part I, which provide important insights as to what traps and limitations we must seek to avoid and transcend. *Section 4.2.* presents my case for employing CHA towards this end. *Section 4.3.* outlines the proposed research design, in the context of my own demonstration (in Chapters 5-7). *Section 4.4.* proposes a provisional further research agenda⁹⁴⁰.

4.1. Paradigm requirements:

The methodological, conceptual, empirical, and political issues highlighted in the previous chapters help inform the requirements of a new paradigm. In summary, I identify several issues to be guarded against/rectified:

- 1) Extant paradigm foundational assumptions were constructed along overwhelmingly ideological, rather than methodological, lines, while synthesising efforts merely reproduced and further confused these issues by clumsily and arbitrarily attempting to amalgamate the best qualities of each: manifesting in a reductionist, ideological, and conceptually and empirically problematic stratified IV imaginary. A 'third' paradigm must endeavour to avoid such extra-academic influences through 1) a self-aware research design based on methodological rigour and a dialectical process of empirical induction, comparative testing, lacunae identification, delimitation, and refinement; and 2) an analytical ethos on divining historical processes rather than IV imaginaries.

⁹⁴⁰ Prior to a more detailed future research agenda in the conclusion chapter.

- 2) Extant paradigms – particularly the conservative paradigm – are shaped and constrained by conceptual nomenclature with non-academic, often ideological, origins. Such terms are, moreover, insufficiently defined, explicated, differentiated, delimited, and operationalised, encouraging idiosyncratic usage, political labelling practices, and non-critical concept-stretching or ‘concept-exonerating’⁹⁴¹, while inhibiting smooth interpretation, integration, and accumulation of findings⁹⁴². A third paradigm must methodologically clarify, amend, or replace such nomenclature, providing in its place a corpus of firmly explicated, differentiated, and operationalised concepts that scholars can employ and understand uniformly.
- 3) Innovations within extant paradigms are highly-bounded. Rather than undergoing iconoclastic Kuhnian ‘revolutions’ when extant iterations prove unsustainable or insufficient, we instead witness ‘*evolutions*’ constrained within the immutable and unquestioned foundational assumptions of the broader paradigm. Another cause of boundedness is that extant paradigms are defensively guarded against ideological threats, e.g., the progressive paradigm guarding against the incorporation of microscopic research findings that might challenge the legitimacy/rationality of dissenters or hint at hegemonic impositions; the conservative paradigm guarding against any acknowledgement of extant grievances that might risk legitimising the IV, etc. A third paradigm must avoid such temptations and embrace and situate all valid insights in a systematic way.
- 4) Much research has been conducted around specific, varying IV ‘imaginaries’ without adequate, methodological differentiation, explication, or delimitation. Conversely, too much is sometimes assumed of the differences between imaginaries, which are often differentiated along ideological, culturalist, or idiosyncratic lines. A third paradigm must balance or transcend these tendencies.

⁹⁴¹ While concept-stretching is the facility of applying concepts to instances of a phenomena where they do not really apply (e.g., labelling any ideology you disagree with ‘extremist’), I coin the heuristic term ‘concept-exonerating’ to refer to the facility of excusing certain instances of a phenomena from the umbrella of that concept (e.g. denying the ‘extremism’ of an ideology with the accepted qualities of ‘extremism’ because it is 1) an ideology you agree with; 2) you have assumed arbitrary distinctions (e.g. between religious and secular ideologies/movements) and concluded that the concept only applies to the one, etc.

⁹⁴² See below.

- 5) Extant paradigms commence analysis *after* an ideology/movement has come into being, focusing on how that ideology/movement popularises rather than how/why it develops in the first place. This both renders remedial repertoires reactive and renders researchers vulnerable to accepting uncritically pernicious tropes on ideology/movement architects/vanguard cadres (e.g., that they are manipulative totalitarians, chauvinistic bigots, etc). A ‘third’ paradigm should consider the entire ‘lifecycles’ of ideologies/movements to remedy these shortcomings. The most important contribution of such would be to circumvent difficult attempts to counter the manifold appeals of varying ideologies/movements to various supporters by focusing on preventing them from emerging in the first place.
- 6) Extant paradigms dichotomise over the level of analysis, focusing exclusively on either the macro- or the micro- (in part for ideological reasons, in part on inevitable disciplinary lines⁹⁴³). A ‘third’ paradigm should find a way to integrate both levels, constructing a ‘social ecology’ of IV lest we should also find ourselves blinded to key variables, dynamics, lacunae, etc.
- 7) Many iterations/sub-paradigms are built upon reductionist deductive summations or naïve falsification (e.g., RVE’s “if many have grievances, but few of the aggrieved engage in IV, grievances must be causally irrelevant,” etc.). A ‘third’ paradigm must take seriously conjunctural causation to avoid such sweeping conclusions.
- 8) Sub-paradigms are often over-generalised – particularly motivational assumptions – taking as universal what may in fact apply only to a small proportion of IV cases, individual perpetrators, etc. A ‘third’ paradigm must circumvent such over-generalisations without being so iconoclastic as to erase the value to be had in their acknowledgement, when properly situated and de-limited.

⁹⁴³ Micro-oriented fields like psychology inevitably investigating micro-dynamics, macro-oriented fields like sociology inevitably investigating macro-dynamics. A third paradigm should leave neither field – each of which possesses great value but easily becomes lost or unstuck when left to its own devices (absent the balances and reality checks of the other) – redundant.

The previous chapters have, moreover, shed light on the consequences of failing to remedy these frailties/establish a firm, valid, consensual paradigms/integrative and interpretative framework:

- 1) *When conducting IV research:* because paradigms – much like Kuhnian ‘paradigms’ – function as truisms that shape and constrain what research questions are asked⁹⁴⁴; what methodological approaches are employed⁹⁴⁵; what variables are explored⁹⁴⁶; how data is interpreted⁹⁴⁷; etc., an erroneous paradigm will produce erroneous conclusions, no matter how methodologically-rigorous the research, potentially reifying strawman caricatures that only further distance us from the truth. Similarly, the same data will produce different conclusions depending on one’s paradigm⁹⁴⁸.
- 2) *When presenting IV research:* insufficient explication and operationalisation of key terms (e.g., ‘ideological motivation’) hinders the integration and accumulation of knowledge, as individuals draw on their preferred paradigm to impute meaning (particularly specific causal mechanisms) – possibly erroneously – to those terms (e.g., ideological motivation as *ideological persuasion* vs. *post facto rationalisation*, etc.).

Finally, the dichotomy between conservative and progressive paradigms – neither of which are sufficient alone but both of which are loath to recognise the value of the other (excluding flawed syntheses) – means that we lose out on vital insights from both paradigms; often denouncing in entirety sub-paradigms which only require delimiting/re-situating. For example, while the progressive paradigm may help shed light on when and why a community is likely to engage in IV or when and why an ideology/movement is likely to popularise, the conservative

⁹⁴⁴ E.g., why do people radicalise? Who is vulnerable to *ideological persuasion*? vs. how to ideologies compete? What macro factors promote episodes of IV, etc.

⁹⁴⁵ E.g., microscopic vs. macroscopic, etc.

⁹⁴⁶ E.g., personality types vs. government types; ‘vulnerable’ individuals vs. ‘vulnerable’ communities, etc.

⁹⁴⁷ E.g., is ideological-motivation a case of *ideological persuasion* or *post facto rationalisation*? does a correlation between poverty and IV (in, for example, ‘radicalisation hotbeds’) signify, for example, evidence of individual vulnerability to *ideological persuasion* or communal vulnerability to *post facto rationalisation*? etc.

⁹⁴⁸ E.g., interpreting an interviewee’s expression of ideological motivation as either product of *ideological persuasion* or *post facto rationalisation*; interpreting a correlation between un/underemployment and participation in IV as either evidence of catering to the needs of those craving self-actualisation vs. catering to the needs of those craving the redressing of systemic injustices.

paradigm may provide vital (if flawed, selective, and overly-generalised) insights as to which individuals from that community are likely to participate, who is likely to embrace that ideology/movement and why, and how they are likely to respond to specific concessions, countermeasures, etc. For this reason, a 'third' paradigm should not constitute a 'revolution' in the classical Kuhnian sense (in which the entire extant body of knowledge is considered defective and is jettisoned in favour of a fresh start), but rather a 'radical restructuring': a new integrative framework into which valuable extant research and insights might be salvaged through a process of re-interpretation and de-limitation, and methodically integrated with other seemingly opposing findings and theories. Loosely, then, a 'third' paradigm would provide a social-ecological tree on whose branches extant and future micro, macro (and meso) sub-paradigms can be correctly hung.

4.2. The case for CHA:

Too diverse and flexible to be considered a distinct methodology, CHA is better conceived as a broad, flexible approach to macroscopic causal research⁹⁴⁹ unified around common ontological and epistemological assumptions⁹⁵⁰. Its chief usage is in divining the causation of macroscopic social phenomena, winning its spurs through numerous award-winning⁹⁵¹ studies demystifying such phenomena

⁹⁴⁹ Ritter asserts that "comparative historical analysis is not a meticulously formulated research method, but rather a flexible approach to social scientific inquiry. As such, it is only natural that practitioners of CHA develop their own ways of conducting research". See: Daniel P. Ritter, "Comparative Historical Analysis," in *Methodological Practices in Social Movement Research*, eds. Donatella della Porta (Oxford Scholarship Online, 2014), 104. See also: Matthew Lange, *Comparative-Historical Methods* (London: SAGE Publications Ltd., 2014), 42.

⁹⁵⁰ See below.

⁹⁵¹ Lange notes that, between 1986 and 2010, "books using comparative-historical methods won one-quarter of the American Sociological Association's award for best book of the year [...] despite a much smaller fraction of sociologists using comparative-historical methods" (Lange, *Comparative-Historical Methods*, 2).

as revolutions⁹⁵², social movements⁹⁵³, democratisation⁹⁵⁴, authoritarianism⁹⁵⁵, state-building⁹⁵⁶, etc. Despite this macroscopic ethos, however, CHA is equipped to produce interpretative frameworks into which both macro- and micro-based research findings can be integrated.

While I explicate my proposed research design below, it is sufficient at this stage to note that CHA is an empirical, small-N case-study-based approach that seeks to identify causation through an iterative interplay of within-case historical-analytical and between-case correlational analysis and, similarly, between inductive and deductive reasoning. Through these processes, CHA seeks to identify, verify, and delimit contextually-bounded causal tendencies; the generalisability of which can be gradually tested through “pattern matching” with additional case-studies (see below). These tasks are underpinned by specific understandings of ontology/epistemology and causation:

4.2.1. Ontological/epistemological underpinnings:

⁹⁵² John Dunn, *Modern Revolutions: An introduction to the analysis of political phenomenon* (Cambridge: Cambridge University Press, 1972); John Foran, *Taking Power: On the Origins of Third World Revolutions* (Cambridge: Cambridge University Press, 2005); Goldstone, *Revolution and Rebellion*; Charles Tilly, *European Revolutions, 1492-1992* (Oxford: Blackwell Publishers Ltd., 1993); Theda Skocpol, *States & Social Revolutions: A Comparative Analysis of France, Russia and China* (Cambridge: Cambridge University Press, 1979); Misagh Parsa, *States, Ideologies, & Social Revolutions: A Comparative Analysis of Iran, Nicaragua and the Philippines* (Cambridge: Cambridge University Press, 2000); Daniel Ritter, *The Iron Cage of Liberalism: International Politics and Unarmed Revolutions in the Middle East and North Africa* (Oxford: Oxford University Press, 2015); and Jeff Goodwin, *No other way out: States and Revolutionary Movements, 1954-1991* (Cambridge: Cambridge University Press, 2001).

⁹⁵³ Donatella della Porta, *Social Movements, Political Violence, and the State: A Comparative Analysis of Italy and Germany* (Cambridge: Cambridge University Press, 1995); and Stefano Bartolini, *The Political Mobilization of the European Left, 1860-1980: The Class Cleavage* (New York: Cambridge University Press, 2000).

⁹⁵⁴ Ruth Berins Collier, *Paths toward Democracy: The Working Class and Elites in Western Europe and South America* (New York: Cambridge University Press, 1999); and Michael Bratton and Nicolas Van De Walle, *Democratic Experiments in Africa: Regime Transitions in Comparative Perspective* (Cambridge: Cambridge University Press, 1997).

⁹⁵⁵ Reinhard Bendix, *Kings or People: Power and the Mandate to Rule* (Berkeley and Los Angeles: University of California Press, 1978); and Barrington Moore Jr., *Social Origins of Dictatorship and Democracy: Lord and Peasant in the Making of the Modern World* (Boston: Beacon Press, 1967).

⁹⁵⁶ Thomas Ertman, *Birth of the Leviathan: Building States and Regimes in Medieval and Early Modern Europe* (Cambridge: Cambridge University Press, 1997); Michael Mann, *The Sources of Social Power: Volume 2, The Rise of Classes and Nation-States, 1760–1914* (New York: Cambridge University Press, 1993); and James Mahoney, *Colonialism and Postcolonial Development: Spanish America in Comparative Perspective* (New York: Cambridge University Press, 2010).

Explicitly or implicitly, CHA typically assumes a *critical realist* [CR] ontological/epistemological paradigm⁹⁵⁷, conceived as a means of “maintaining a position [...] ‘constructivist’ enough to recognize the unavoidable intrusion of point of view, implicit theory, and interpretive tropes in the production of ‘history,’ but ‘realist’ enough to ascribe actual truth value to some historical accounts⁹⁵⁸”. CR does this by assuming reality exists objectively, while appreciating interpretivist warnings that perceptions of reality are distorted by discourses, ideology, culture, etc. Specifically, CR promulgates a ‘stratified ontology’, in which reality comprises three layers: 1) the *Empirical* (what we can observe, experience, or perceive)⁹⁵⁹; 2) the *Actual* (events and actions, observable or not, that regulate the *empirical*)⁹⁶⁰; and 3) the *Real* (structures, mechanisms, tendencies, conventions, institutions, etc., observable or not, that regulate the *actual*)⁹⁶¹. The *Real* essentially constitutes the hidden ‘causal mechanisms’ [CMs] (defined below) - or “any entity that has causal properties⁹⁶²” - behind macroscopic social phenomena. Epistemologically, it is conceived that, by observing the *empirical* and, where visible, the *actual*, we can extrapolate credible theories on the *Real*, using the methods outlined in the next section.

4.2.2. Approach to causation:

CHA eschews traditional conceptions of causation as constituting a relationship between two variables (e.g., presence of variable X promotes outcome Y; absence of variable X prevents outcome Y⁹⁶³) – at the level of research design if

⁹⁵⁷ Steinmetz convincingly argues that most practitioners of CHA, “whatever their self-description, are critical realists [...] [because] Critical realism offers a defence and a clarification of the practices of ‘actually existing historical sociologists’”. See: George Steinmetz, “Critical Realism and Historical Sociology. A Review Article,” *Comparative Studies in Society and History* 40(1) (Jan., 1998), 171 & 174.

⁹⁵⁸ Ian S. Lustick, “History, Historiography, and Political Science: Multiple Historical Records and the Problem of Selection Bias,” *The American Political Science Review* 90(3) (Sep., 1996), 613.

⁹⁵⁹ Joe O’Mahoney and Steve Vincent, “Critical Realism as an Empirical Project: A Beginner’s Guide,” in *Studying organizations using Critical Realism: a practical guide*, eds. Paul K. Edwards, Joe O’Mahoney, and Steve Vincent (Oxford: Oxford University Press, 2014), 9.

⁹⁶⁰ Denis Walsh, “Critical realism: An important theoretical perspective for midwifery research,” *Midwifery* 30 (2014), 2; O’Mahoney and Vincent, “Critical Realism,” 9.

⁹⁶¹ Philip S. Gorski, “Review: ‘What is Critical Realism? And Why Should You Care?’” *Contemporary Sociology* 42(5) (Sep., 2013), 665.

⁹⁶² S. Fleetwood, “Bhaskar and critical realism,” in *Oxford Handbook of Sociology, Social Theory and Organisation Studies: Contemporary Currents*, eds. P. Adler, P. Du Gay, G. Morgan, and M. Reed (Oxford: Oxford University Press, 2014), 204.

⁹⁶³ A distinction fleshed out in James Mahoney, “Strategies of Causal Assessment in Comparative Historical Analysis,” in *Comparative Historical Analysis in the Social Sciences*, eds. James Mahoney and Dietrich Rueschemeyer (New York: Cambridge University Press, 2003), 340.

not more generally⁹⁶⁴. Instead, CHA perceives causation as resulting from complex, contingent, and conjunctural CMs and/or historical processes⁹⁶⁵. CHA conceptualises historical reality and causation as ‘thick’: “drenched with causes that inhere in sequence, accumulation, contingency and proximity⁹⁶⁶”; “not as time-bounded snapshots within which ‘causes’ affect one another ... but as stories, cascades of events” in which “complex actors encounter complex structures [...] [with] no independent causes. Since no cause ever acts except in complex conjuncture with others⁹⁶⁷”. Thus I perceive causation not as deterministic, necessary and/or sufficient relationships between static variables at a single point of time but instead approach causation “narratively [...] generalizing not in terms of ‘causes’ [per say] but in terms of narratives⁹⁶⁸”; with “explanations to be presented in the shape of historically contextualized narratives that explicitly trace the emergence of the phenomenon at hand⁹⁶⁹”. In the context of this study, this involves tracing – as historical narratives – the ‘causal cascades’ of IV episodes to identify the interacting probabilistic mechanisms carrying them (see below).

This has several ramifications: Firstly, by understanding causation as cascading historical processes (or a dialectic between multiple, interacting processes), the scholar is able and obliged to examine causation beyond mere correlation; reconstructing as narratives processes hypothesised through correlational research⁹⁷⁰, creating historically-contextualised analytical narratives that naturally contextualise (and thus substantiate and delimit) that causal

⁹⁶⁴ While we may conclude from our analyses certain (albeit highly contingent and conjunctural) ‘traditional’ ‘variable-to-variable’ causal relationships (e.g., presence of variable A makes outcome B more likely), causation is sought through analysing historical processes – as will become apparent.

⁹⁶⁵ Elisabeth S. Clemens, “Toward a Historicized Sociology: Theorizing Events, Processes, and Emergence,” *Annual Review of Sociology* 33 (2007), 528; Kevin Fox Gotham and William G. Staples, “Narrative Analysis and the New Historical Sociology,” *The Sociological Quarterly* 37(3) (Summer 1996), 483-484; Christine Trampusch & Bruno Palier, “Between X and Y: how process tracing contributes to opening the black box of causality,” *New Political Economy* 21(5) (2016), 442; Jeffery M. Paige, “Conjuncture, Comparison, and Conditional Theory in Macrosocial Inquiry,” *American Journal of Sociology* 105(3) (Nov., 1999), 782; Ritter, “Comparative Historical Analysis,” 99; Elizabeth Picard, “Historical sociology and the renewal of the social sciences,” in *Critical Research in the Social Sciences: A transdisciplinary East-West Handbook*, eds. Roger Heacock and Édouard Conte (Birzeit – Palestine: Birzeit University and the Institute for Social Anthropology Austrian Academy of Sciences, 2011), 132; and James Mahoney, et al., “The Logic of Historical Explanation in the Social Sciences,” *Comparative Political Studies* 42(1) (Jan., 2009), 128.

⁹⁶⁶ Tilly, quoted in Paige, “Conjuncture,” 782.

⁹⁶⁷ Abbott, quoted in Fox Gotham and Staples, “Narrative Analysis,” 483.

⁹⁶⁸ Ibid.

⁹⁶⁹ Ritter, “Comparative Historical Analysis,” 99.

⁹⁷⁰ Ibid, 99; Picard, “Historical sociology,” 132; Trampusch & Palier, “Between X and Y,” 438; Mahoney, et al., “The Logic of Historical Explanation,” 128.

process and highlight the nature, influence, contingency, and role of other, intervening processes. This ties into the second ramification: causation is not perceived as deterministic (necessary and/or sufficient), nor is it considered singular. Instead, causation is considered to be *conjunctural* (an open system subject to multiple and interacting CMs/processes at various levels of structure and agency)⁹⁷¹ and *probabilistic*; increasing the likelihood of an outcome occurring – under a particular set of circumstances - without being necessary or sufficient⁹⁷². I would also add, drawing on my earlier discussion of Trotsky⁹⁷³, that these multiple CMs/processes interact in a dialectical manner – as I will explore throughout chapters 6-7. Mackey categorises this type of causation as “an insufficient but necessary part of a condition which is itself unnecessary but sufficient for the result” (abbreviated as *INUS* causation)⁹⁷⁴. Otherwise stated, the removal of a CM does not render an outcome impossible, but its presence contributes alongside other CMs to make an outcome more likely⁹⁷⁵. Such a conceptualisation is deemed more consonant with the historical record⁹⁷⁶ and more realistic in an open system⁹⁷⁷. Moreover, it discourages the premature discarding of hypothesised CMs should they be found empirically falsifiable in certain cases, while also encouraging the scholar to approach causation holistically, meaning that apparently unfalsified correlations must still be examined as potentially subject to intervening, less obvious CMs.

1.1.1. CHA: a ‘manifesto’⁹⁷⁸:

⁹⁷¹ Clemens, “Toward a Historicized Sociology,” 528; Gotham and Staples, “Narrative Analysis,” 483-484; Paige, “Conjuncture,” 782.

⁹⁷² Trampusch & Palier, “Between X and Y,” 442; James Mahoney, “Toward a Unified Theory of Causality,” *Comparative Political Studies* 41(4/5) (Apr./May 2008), 415; Stanley Lieberson, “Small N’s and Big Conclusions: An Examination of the Reasoning in Comparative Studies Based on a Small Number of Cases,” *Social Forces* 70(2) (Dec., 1991), 309.

⁹⁷³ In Chapter 2.

⁹⁷⁴ Quoted in Mahoney, et al., “The Logic,” 125.

⁹⁷⁵ James Mahoney, “Process Tracing and Historical Explanation,” *Security Studies* 24(2) (2015), 203.

⁹⁷⁶ Mahoney, et al., “The Logic of Historical Explanation,” 125.

⁹⁷⁷ Paige, “Conjuncture,” 782.

⁹⁷⁸ I am not the first to express CHA as a ‘manifesto’: In his seminal 1991 study, *Revolution and Rebellion in the Early Modern World* (Goldstone, *Revolution and rebellion*) leading CHA scholar Jack A. Goldstone presented his methodology as a ‘manifesto’: proposing CHA lead a revitalisation of *revolution studies* (Ibid, 51). In yet more grandiose terms, CHA has been proclaimed a “revolution within the social sciences” (Picard, “Historical sociology,” 124). This messianism is rooted in a common resolve: that CHA possesses unique qualities and safeguards capable of breaking persistent impasses and mitigating against persistent frailties in macroscopic causal research.

CHA can help guard against the persistent issues afflicting IV research and construct frameworks through which extant literature can be methodologically reinterpreted, delimited, and integrated, and future research/policy methodologically guided:

- 1) By constructing macroscopic 'lifecycle' models for IV episodes, we can produce a macroscopic 'tree' on which to appropriately 'hang' insights from both macroscopic and microscopic research (e.g., identifying the point at which, or the ways in which, or the extent to which, different sub-paradigms are likely to come into play, etc.). Otherwise stated, we can construct a holistic interpretive and integrative framework into which extant theories and/or findings can be evaluated and correctly interpreted, situated, contextualised, and delimited.
- 2) By macroscopically tracing these 'lifecycles', we can circumvent complex issues such as variable individual motivations by seeking out pre-emptive remedies that prevent the triggering of IV episodes or emergence of ideologies/movements in the first place (aka identifying the 'prime-mover', critical junctures, and contingent incubation processes), prior to their becoming draws for individuals with varying motives and propensities each requiring different remedies. Otherwise stated, people – whatever their motives – cannot be drawn to an ideology/movement that does not exist, nor can they flock to a conflict that is not brewing.
- 3) CHA can aid methodological development and refinement of operationalised, explicated, and differentiated social-scientific concepts. Mahoney notes that CHA has formulated some of most important concepts in social science and, moreover, distinctions within those concepts (e.g., different types of revolution, different types of regime, etc.)⁹⁷⁹, while I have already constructed and differentiated several concepts through my loose comparative study of extant literature (e.g., my distinction between *ideological persuasion* and *post facto rationalisation*; my division of extant paradigms into their respective iterations and sub-paradigms, my division of ideologies into their constituent parts, etc.). This is generally achieved through CHA's comparative component which identifies similarities and

⁹⁷⁹ James Mahoney, "Comparative-Historical Methodology," *Annual Review of Sociology* 30 (2004), 93. See also: Alexander L. George, and Andrew Bennett, *Case Studies and Theory Development in the Social Sciences* (Cambridge, Ma: MIT Press, 2005), 20.

differences between ostensibly similar (or ostensibly different) cases/phenomena, aiding in both defining, delimiting, and stratifying conceptualisations of those cases/phenomena. Additionally, CHA's conception of causality as complex, contingent, and conjunctural historical processes enables entities to be understood holistically in terms of their constituent parts, influences, roots, trajectories, and contingencies. This means that concepts almost inevitably take the form of explicitly composed ideal types that can be methodically tested for validity, suitability, and generalisability according to their criteria. This both aids in operationalising such concepts, and prevents their arbitrary usage (e.g., labelling all individuals engaging in Islamist IV as 'extremists') and unwitting stretching (e.g., lumping all Islamist ideologies together; under- or over-differentiating between terrorism, insurgency, and revolution, etc.). This further aids in preventing erroneous historical analogies to inform policymaking⁹⁸⁰. By insisting upon holistic and explicitly typologised conceptualisations of different types and trajectories of social phenomena, scholars can more systematically identify causally similar case-studies, and discount ostensibly similar yet actually divergent ones, etc.

- 4) CHA circumvents complications caused by varying IV imaginaries by making it part of the research process/presentation to explicate the social-political IV 'arena' in which the IV episode is taking place. While the specific shape and properties of such an arena explication will become clearer in my own demonstration (chapter 5), such constructs provide historical-sociological explorations of the conflict context and 'infrastructures' of contention highlighting the specific social-political dynamics at play. In doing so, we can provide further explicated and operationalised concepts that can be employed or contrasted/differentiated against by scholars applying the same research design to different case-studies⁹⁸¹. Gradually and collaboratively, a stock of clearly explicated, operationalised, and differentiated concepts can accumulate, further aiding the analysis, contextualisation, and delimitation process necessary for constructing a 'third' paradigm. These differentiated

⁹⁸⁰ Indeed, according to George and Bennett, the comparative historical approach was devised, in part, specifically "to discourage decision-makers from relying on a single historical analogy in dealing with a new case" (George and Bennett, *Case Studies*, 67).

⁹⁸¹ *Ibid*, 19-20.

concepts will function as ‘concepts with adjectives’⁹⁸², with the differentiation being based not on the ideology in question (e.g., secular vs. religious) but on the nature of the IV arena or development trajectory of the episode (hypothetical distinctions might include, for example, IV within democracies vs. within autocracies; ideologies/movements popularising prior to IV onset vs. post-onset, etc.).

- 5) CHA’s focus on identifying and tracing conjunctural, contingent causal processes protects against the variable bias, omission, and exaggeration afflicting much extant IV literature. This is achieved by developing holistic understandings of how various layers of structure and agency interact over time to promote a particular outcome, as well as by the comparative method’s tendency to reveal subtle commonalities across cases, which are then substantiated beyond mere correlational congruence through process-tracing/narrative analysis (see below). Moreover, CHA can help guard against biases stemming from ideological/cultural and entrenched ‘common sense’ preconceptions, by forcing investigators to go beyond initial impressions by substantiating causation through both narrative analysis and correlational studies⁹⁸³.
- 6) CHA protects against reductionist/essentialist tendencies in much presentist and/or microscopic research by exploring causation over a long period, which reveals contingencies and elasticity in dynamics we often assume are immutable or primordial⁹⁸⁴. Dodge champions historically-oriented social science in *Middle East Studies* for this reason, asserting that the tendency to examine the region’s history only over the last 15 years (since the fall of Saddam), encourages spurious attributions of today’s sectarian tensions as a simple continuation of sectarian conflicts rooted in early Islamic history. In contrast, exploring the past 500 years of the region’s history tells a different, more complex story⁹⁸⁵.

⁹⁸² Ibid, 20; James Mahoney, “Qualitative Methodology and Comparative Politics,” *Comparative Political Studies* 40(2) (Feb., 2007), 127.

⁹⁸³ Kathleen M. Eisenhardt, “Building Theories from Case Study Research,” *The Academy of Management Review* 14(4) (Oct., 1989), 547.

⁹⁸⁴ As noted above.

⁹⁸⁵ Toby Dodge, “‘Bourdieu goes to Baghdad’: Explaining hybrid political identities in Iraq,” *Journal of Historical Sociology* 31(1) (Mar., 2018): pp. 25-38; Toby Dodge, “Can Iraq be saved?” *Survival* 56(5) (2014): pp. 7-20. See also Matin, “Lineages of the Islamic State”. It is this same lack of historical sensitivity that encourages ‘culturalist’ understandings of Islamist IV, whereby observers quickly attribute violent Sunni Islamist ideologies of today to allegedly perennial Sunni Islamist hegemonic impulses supposedly rooted in the earliest Islamic conquests (or, more erroneously

- 7) CHA helps identify when proposed causal explanations tell only half the story, by revealing cases where variable/process X did not lead to outcome Y. For example, my usage of CHA in my MRes dissertation⁹⁸⁶ helped reveal the insufficiency of arguments attributing Sunni-Lebanese Islamist ideological popularisation to a crisis in mainstream Sunni leadership because 1) it was not the Sunni-Lebanese community's first leadership crisis⁹⁸⁷ and 2) a Maronite-Lebanese leadership crisis had neither resulted in IV nor ideological-popularisation. This prompted a successful search for intervening variables by comparing the Sunni and Maronite leadership crises. Importantly, the falsified variable was not discounted, but embellished.
- 8) By studying the organic de-popularisation of ideologies/movements in specific settings, we can observe 'natural experiments' revealing the processes by which ideologies/movements de-popularise, providing more reliable insights than can be gleaned by attempting to evaluate anti-IV interventions which, due to the open system dynamics of ideological-popularisation/de-popularisation, are hampered by unclear impacts of exogenous factors⁹⁸⁸.

Thus, CHA possesses great potential for guarding against the frailties identified throughout chapters 1-3, (in particular: denaturalising entrenched assumptions; identifying hidden lacunae; avoiding variable bias/omission; avoiding spurious analogising; and avoiding ideologically-informed 'imaginary' constructions and differentiations), while aiding in concept construction, operationalisation, and delimitation; methodological comparison; theory delimitation/generalisation; and identification of contextually-sensitive, 'thick' causation, etc. In the final part of this chapter, I outline how CHA can be employed to revise the foundational

still, the teachings of the Qur'an), and interpret their motivations, ideas and actions as a continuation of this *obediently violent* 'conversion by the sword' agenda, rather than placing them in their correct historical and socio-political context.

⁹⁸⁶ Mark Bracher, "Lebanon's Sunni Leadership Crisis: A Gateway for Jabhat al-Nusra and the 'Islamic State' into Lebanon?" Masters Diss., *University of Exeter* (Sep., 2016).

⁹⁸⁷ Previous leadership crises had resulted in IV and ideological-popularisation but under radically different ideologies/movements, prompting the question – addressed in Chapter 7 of this study – as to why Islamism only popularised in this most recent crisis.

⁹⁸⁸ As noted in Chapters 1-3, particularly in the debate over the efficacy of the Iraqi 'Surge' campaign.

assumptions of extant IV paradigms, in the context of my own demonstrative, Sunni-Lebanese case-study:

4.3. Research Design:

Chapters 5-7 demonstrate how a CHA approach could look. Specifically, they begin revising the three foundational assumptions of IV research by undertaking three research tasks:

- 1) Chapter 5 conceptualises the Sunni-Lebanese IV 'arena', situating the following analyses in their historical-social-political setting, providing concepts to aid those analyses, providing systematic explication of that arena for ease of comparison with additional case-studies and, for the reader, providing sufficient context to understand the analyses.
- 2) Chapter 6 revises the first foundational assumption by answering it in the context of the three episodes of Sunni IV (the 1958 *Lebanese Crisis*, the 1975-6 *Two-Year War*, and the 2012-2014 *Sunni Insurrections*). Specifically, I construct a causal 'lifecycle' model for episodes of Sunni-Lebanese IV based on a common-denominator comparative analysis of all three episodes, with an ethos on locating the role played by the ideology in the causation of the conflict. This lifecycle is explicitly bounded to the Sunni-Lebanese context and cannot be generalised beyond it. However, as part of the future research agenda, it can be compared against lifecycle models drawn from different case-studies, using the same basic research design, to extrapolate/abstract, substantiate, and refine further commonalities. Through this prolonged, collaborative, and dialectical process we can gradually construct a 'third' paradigm.
- 3) Chapter 7 revises the second and third foundational assumptions by answering them in the context of the three ideological-popularisation-to-de-popularisation episodes (*Pan-Arab Nationalism*, *Marxism*, and *Islamism*), following the same logic, purpose, and future agenda as that in chapter 6.

These tasks will be carried out as follows:

4.3.1. Data collection:

Data collection involves immersing oneself in the subject matter – empirical, historiographical, and theoretical – to attain a holistic understanding of the system (Lebanon), episodes (of IV and of ideological-popularisation), and the phenomenon (IV)⁹⁸⁹. This is a broad, holistic, iterative⁹⁹⁰, essentially unstructured process, considered complete only when one reaches a point of ‘saturation’ (i.e., one ceases to uncover significant new information/ information that raises new questions⁹⁹¹). Research is thus broad in scope, requiring understandings of 1) Lebanon’s history (modern and pre-modern) and socio-political-cultural peculiarities; 2) how the concerned ideology/movement developed both within and beyond Lebanon; and 3) extant middle-range theories on related phenomena⁹⁹². Resultantly, like most CHA research⁹⁹³, I depend almost exclusively on secondary sources. While pragmatic (owing to the vast scope of required information)⁹⁹⁴, CHA’s secondary source reliance is also purposive, “the objective [being] not to discover new facts, but to provide a new interpretation of a phenomenon with the help of ‘old’ evidence⁹⁹⁵”. While some are skittish of this recourse⁹⁹⁶, CHA practitioners remind sceptics that secondary source usage

⁹⁸⁹ Frank Schimmelfennig, “Efficient process tracing: Analyzing the causal mechanisms of European integration,” in *Process Tracing: From Metaphor to Analytic Tool*, Eds. Andrew Bennett and Jeffrey T. Checkel (Cambridge: Cambridge University Press 2015), 102; Mahoney, “Process Tracing,” 202.

⁹⁹⁰ Explained below.

⁹⁹¹ John W. Creswell, *Qualitative Inquiry & Research Design: Choosing among five approaches*, 2nd ed. (Thousand Oaks, California: SAGE Publications Ltd., 2007), 67; Catherine Dawson, *Introduction to Research Methods: A practical guide for anyone undertaking a research project*, 4th ed. (London: Constable & Robinson Ltd, 2009), 19.

⁹⁹² See below.

⁹⁹³ Ritter, “Comparative Historical Analysis,” 107; Lustick, “History,” 605; John H. Goldthorpe, “The Uses of History in Sociology: Reflections on Some Recent Tendencies,” *The British Journal of Sociology* 42(2) (Jun., 1991), 220; Lange, *Comparative-Historical Methods*, 15; Theda Skocpol, “Emerging agendas and recurrent strategies in historical sociology,” in *Vision and Method in Historical Sociology*, ed. Theda Skocpol (Cambridge: Cambridge University Press, 1984), 382; Skocpol, *States & Social Revolutions*, xiv; Victoria E. Bonnell, “The Uses of Theory, Concepts and Comparison in Historical Sociology,” *Comparative Studies in Society and History* 22(2) (Apr., 1980), 172.

⁹⁹⁴ From a pragmatic standpoint, the kind of primary, ethnographic field research usually insisted upon by sociological purists, and the archival mining and evaluating of artefacts prized by historians, is rendered unfeasible by the spatially and temporally expansive canvases that need to be covered. As Skocpol wrote in her pathbreaking CHA study *States & Social Revolutions*: “The comparativist has neither the time nor (all of) the appropriate skills to do primary research [...] Instead, the comparativist must concentrate upon searching out and systematically surveying specialists’ publications [...]”. See: Skocpol, *States & Social Revolutions*, xiv. See also: Bonnell, “The Uses of Theory,” 172; Lange, *Comparative-Historical Methods*, 15.

⁹⁹⁵ Ritter, “Comparative Historical Analysis,” 107. See also: Skocpol, *States & Social Revolutions*, xiv; and Stephen Mennell, “History is Not Bunk: Why Comparative-Historical Sociology is Indispensable When Looking to the Future,” *Human Figurations* 6(2) (2017).

⁹⁹⁶ Two main criticisms have been levelled against this approach. Firstly, at the epistemological level, critics allege a high propensity for bias – both on the part of the sources consulted, and in the selection of those sources. Historians and subject matter experts can inject misleading biases

remains subject to the same/analogous standards and processes used when evaluating primary data⁹⁹⁷.

4.3.2. Data analysis:

CHA is iterative, analysis beginning informally throughout the data collection process. This initial “soaking and poking”⁹⁹⁸ stage involves immersing oneself in the subject matter with as open-a-mind as possible, eschewing prior-conceived hypotheses and attempting to relegate to the back of one’s mind implicit theories/assumptions⁹⁹⁹. As familiarity with the case studies increases, one begins to inductively identify leads, patterns, and trends suggestive of possible CMs (‘proto-hypotheses’), which can then be investigated further. Such proto-hypotheses may be identified during *within-case analysis* (noting potential sequences/confluences of events/dynamics seeming to contribute towards an

(semi-)consciously (on ideological grounds) and subconsciously (on account of their paradigmatic and methodological choices, access to source materials, and relative position of cultural and temporal positionality). Similarly, historical sociologists may – consciously or subconsciously – cherry-pick those interpretations of history that lend credence to their preconceived hypotheses. Additionally, some historians accuse CHA of attempting to impose a discredited positivist approach to mining historical accounts for objective facts. See: Alan S. Zuckerman, “Advancing explanation in comparative politics: social mechanisms, endogenous processes, and empirical rigor,” in *Comparative Politics: rationality, culture and structure*, 2nd ed., eds. Mark Irving Lichbach and Alan S. Zuckerman (Cambridge: Cambridge University Press, 2009), 93; George and Bennett, *Case Studies*, 90; Lustick, “History,” 608-613; Goldthorpe, “The Uses of History,” 223-225.

⁹⁹⁷ Firstly, it is incumbent upon CHA practitioners to treat secondary source material with the same evaluative rigour as any scholar evaluating any kind of source or data. They are equipped to do this firstly on account of their own necessary familiarity with the case-study (and prominent debates in the historiography of that case) and relevant theoretical trends and positions which, as noted above, becomes immersive as a result of the research process. They are additionally equipped through the reflexive practice of the sociology of knowledge, which “functions as a probe for the intrusion of normative elements [...] critically scanning for the implicit pragmatic or axiological assumptions [...] carried by distinctive intellectual or cultural traditions [and] ideological bias – to be attained by registering and factoring in the ‘social presence’ of the author”. See: Joseph M. Bryant, “On sources and narratives in historical social science: a realist critique of positivist and postmodernist epistemologies,” *British Journal of Sociology* 51(3) (Sep., 2000), 510. See also: Joseph M. Bryant, “Evidence and Explanation in History and Sociology: Critical Reflections on Goldthorpe’s Critique of Historical Sociology,” *The British Journal of Sociology* 45(1) (Mar., 1994), 14; Nick Hart, “John Goldthorpe and the Relics of Sociology,” *The British Journal of Sociology* 45(1) (Mar., 1994), 28. Additionally, they respond to accusations of positivism by nothing that essentially objective ‘reportage’ (i.e. events, dates, who, what, where, how many, etc.) can be separated and extracted from the subjective ‘interpretations’ historical works build around them (Bryant, “Evidence and Explanation,” 14; Bryant, “On sources and narratives,” 503). Moreover, this ontological critique is rooted in an postmodernist/radical constructionist paradigm of historicism (Bryant, “On sources,” 429) which holds little truck with the CR (arguably) intrinsic to CHA ontology (as noted above).

⁹⁹⁸ A method coined and popularised by Richard F. Fenno, *Home style: House members in their districts* (London: Longman, 1978).

⁹⁹⁹ Leanne C. Powner, *Empirical Research and Writing: a political science student’s practical guide* (Washington, DC: CQ Press, 2015) [Kindle], Chapter 5.

outcome) or *between-case analysis* (noting potential correlations)¹⁰⁰⁰. These proto-hypotheses are noted for further exploration and those proto-hypotheses not discounted during that further exploration are catalogued for more systematic analysis once data collection is complete¹⁰⁰¹.

Hypothesised CMs are evaluated and expanded upon using within- and between-case methods; chiefly *narrative analysis*, *process-tracing*, and *congruence testing*, all in a back-and-forth iterative manner:

4.3.2.1. *Narrative analysis:*

The foremost *within-case* method, narrative analysis identifies causation not through interactions of variables but by trajectories of sequential, contingent processes, taking the form of “historically-contextualised narratives that explicitly trace the emergence of the phenomenon at hand¹⁰⁰²”. Practitioners praise the approach for its ability to consider complex, conjunctural causation¹⁰⁰³, retain sensitivity to context and detail¹⁰⁰⁴, and for its “‘inherent logic’ based on the sequential connectedness and unfolding of action¹⁰⁰⁵”. This inductive ‘historian’s’ approach¹⁰⁰⁶ has been likened to the ‘detective’s’ method: “sorting through the available evidence and attempting to reconstruct causal scenarios¹⁰⁰⁷”; searching out “smoking guns” and “air-tight-alibis”¹⁰⁰⁸; “constantly mak[ing] decisions regarding the relevance of various data. Some facts of the case will turn out to be unrelated to the crime; other clues must be recognized as such and pursued vigorously¹⁰⁰⁹”. This process – which individually might warrant the same

¹⁰⁰⁰ The more formal procedures of within-case and between-cases analyses are discussed below.

¹⁰⁰¹ Andrew Bennett and Jeffrey T. Checkel, “Process tracing: from philosophical roots to best practices,” in *Process Tracing: From metaphor to analytic tool*, eds. Andrew Bennett and Jeffrey T. Checkel (Cambridge: University of Cambridge Press, 2015), 18.

¹⁰⁰² Ritter, “Comparative Historical Analysis,” 99.

¹⁰⁰³ James Mahoney, “Nominal, Ordinal, and Narrative Appraisal in Macrocausal Analysis,” *American Journal of Sociology* 104(4) (Jan., 1999), 1168.

¹⁰⁰⁴ *Ibid.*

¹⁰⁰⁵ Larry J. Griffin, “Narrative, Event-Structure Analysis, and Causal Interpretation in Historical Sociology,” *The American Journal of Sociology* 98(5) (Mar., 1993), 1097.

¹⁰⁰⁶ Trampusch and Palier, “Between X and Y,” 438; George and Bennett, *Case Studies*, 90.

¹⁰⁰⁷ Lange, *Comparative-Historical Methods*, 5.

¹⁰⁰⁸ Mahoney, “Qualitative Methodology,” 132.

¹⁰⁰⁹ Robert K. Yin, “The Case Study Crisis: Some Answers,” *Administrative Science Quarterly* 26(1) (Mar., 1981), 63.

constructionist criticisms sometimes levelled – fairly or unfairly¹⁰¹⁰ - against the historian's craft (a historian's narratives essentially constituting their subjective interpretations of events¹⁰¹¹) - is aided and substantiated, iteratively, by the following parallel processes:

4.3.2.2. *Process-tracing:*

Due to definitional promiscuity¹⁰¹², narrative analysis and process-tracing often overlap in extant CHA literature. In my usage, process-tracing builds upon narrative analysis to help substantiate, refine, embellish, and explicate the precise CMs occurring at each point in the narrative¹⁰¹³. While various forms of process-tracing exist – both inductive and deductive¹⁰¹⁴ – the primary approach used to embellish upon narrative analysis is 'efficient' process-tracing, in which extant middle-range theories are used to 'open the black box' of causation suggested by the narrative analyses. This generally involves induction leading to deduction – the inductive narrative analysis recalling middle-range theories that can then be consulted to help divine the precise CM. As Mahoney explains: "one traces the broad history of the case at a fine-grained level and pulls out for special examination potential causal factors when they are consistent with existing theory¹⁰¹⁵". These theories, Bonnell elaborates "function as bright threads that, when woven into the fabric of historical narrative, allow [...] general patterns [to be identified] while at the same time preserving a sense of historical particularity¹⁰¹⁶". Continuing with the 'detective' analogy: if narrative analysis places the burglar in the right building at the right time, process tracing can help

¹⁰¹⁰ This being a point of personal ontology/epistemology. As a critical realist I would award the criticism some validity, but eschew considering it a damning indictment of the craft and its claims to causal insight.

¹⁰¹¹ Lustick, "History," 608; Goldthorpe, "The Uses of History," 221.

¹⁰¹² Trampusch and Palier note that the definition of process tracing has been "'stretched' and applied to nearly ever analysis of processes." They identify over 18 different definitions of the term in extant literature. See: Trampusch and Palier, "Between X and Y," 438.

¹⁰¹³ This accords with Lange's usage. He writes: "Process tracing is similar to causal narrative but is more focused, as it explores causal mechanisms linking potential causes and outcomes instead of general processes involving a multitude of factors" – see: Lange, *Comparative-Historical Methods*, 18.

¹⁰¹⁴ Inductive approaches generally overlap with narrative analysis, while deductive approaches – outlined below – build upon it. Multiple scholars describe 'inductive process tracing' in the same way we have described narrative analysis, for example: Bennett and Checkel, "Process tracing," 18; Trampusch and Palier, "Between X and Y," 443; Tulia G. Falleti, "Process tracing of extensive and intensive processes," *New Political Economy* 21(5) (2016), 455.

¹⁰¹⁵ Mahoney, "Process Tracing," 215. See also: Goldstone, "Comparative Historical Analysis," 48; Falleti, "Process tracing," 457; Trampusch and Palier, "Between X and Y," 440, 442-443, 450; Schimmelfennig, "Efficient process tracing," 106.

¹⁰¹⁶ Bonnell quoted in Picard, "Historical sociology," 134.

decipher how he got in, why he chose that building to burgle, etc. This use of theory also helps integrate, situate, refine, and delimit extant middle-range theories, sub-paradigms, etc. – a key objective of the paradigm-building project.

4.3.2.3. *Congruence testing:*

This *between-case* method both informs and builds upon *within-case* methods. It informs them by identifying potential CMs/narrative arcs through correlational research, which can then be investigated, substantiated, refined, etc. using *within-case* methods¹⁰¹⁷. It builds upon potential CMs identified through *within-case* methods by using additional case studies to see if that CM has been understood correctly, or if similar cases suggest different interpretations of the assembled narratives (e.g., suggesting the role of a different middle-range theory in the 'black box', or a different weighting of conjunctural variables, etc.). Additionally, congruence testing enables similarities/differences to be systematically identified between cases, aiding in analogous reasoning, etc¹⁰¹⁸.

4.3.3. Compilation of analytical narratives:

Finally, the conclusions drawn from these processes are compiled, integrated, and presented in an analytical or 'strategic' narrative ('lifecycle' models in this case). These narratives present a "general explanation rather than a detailed tracing of a causal process [...] [one] couched at a higher level of generality and abstraction¹⁰¹⁹" with the intention of stressing the commonalities of causation across cases¹⁰²⁰. In my own presentation, the causal model is presented first in the abstract, before the three comparative cases are presented, along the same format, to show how they inform and fit into that model. The presentation is then

¹⁰¹⁷ By applying within-case methods to "assess whether a statistical correlation between independent variables and the dependent variable is of causal significance [...] [by] subject[ing] a single case in which that correlation appears to more intensive scrutiny, as the historian would do, in order to establish whether there exists an intervening process...". See: Trampusch and Palier, "Between X and Y," 438. See also: Schimmelfennig, "Efficient process tracing," 101; Ritter, "Comparative Historical Analysis," 102.

¹⁰¹⁸ Goldstone, "Comparative Historical Analysis," 52; Lange, *Comparative-Historical Methods*, 16 & 53.

¹⁰¹⁹ George and Bennett, *Case Studies*, 211.

¹⁰²⁰ Goldstone describes this as "select[ing] its [the historical narrative's] elements in response to a clearly articulated theoretical backdrop [...] designed to demonstrate the strict causal connections between elements in a sequence of events [...] [though still] demonstrate[ing] the impact of contingency" (Goldstone, "Comparative Historical Analysis," 50). See also: Robin Stryker, "Beyond History Versus Theory: Strategic Narrative and Sociological Explanation," *Sociological Methods & Research* 24(3) (1996): pp. 304-352.

concluded by a further abstracted summary of conclusions, which themselves form hypotheses for a 'third' paradigm's foundational assumptions.

These processes will all become more apparent over the following three demonstration chapters.

4.4. Future research agenda:

This study in no way suggests that my small-N Sunni-Lebanese case-study is sufficient to inform a new 'third' paradigm alone. The models constructed are contextually-bounded to their specific empirical contexts and ungeneralisable. A 'third' paradigm can only develop incrementally and collaboratively, as multiple researchers seek to apply the research design to multiple case-studies, treating the findings of their predecessors as proto-hypotheses to be substantiated, refined, and/or challenged through 'pattern matching': methodologically generalising/delimiting/situating a theory by showing that it "holds for multiple cases" via "'parallel demonstration of theory'¹⁰²¹". While I am hopeful that some of the concepts constructed by, and conclusions drawn from, my own demonstrative case may help provide tools and viable hypotheses for researchers moving forward (aiding the integration of subsequent findings through usage of common, fully-explicated and operationalised terminology), it is desired that future studies will refine and add to this stock. I expand on this agenda – in light of the findings of the following chapters – in detail in the concluding chapter.

4.5. Conclusion:

This chapter has outlined CHA's potential for circumventing/remedying many of the key issues afflicting extant IV research/paradigms, and explained how such an approach can be used to revise the foundational assumptions upon which most IV research is conducted, culminating, eventually, in a methodologically-rigorous 'third' paradigm. The final 3 chapters will demonstrate precisely how this will occur, using my Sunni-Lebanese case-studies.

¹⁰²¹ Lange, *Comparative-Historical Methods*, 53.

Chapter 5: The Lebanese 'ideological violence arena' – an overview:

5.

The remaining chapters demonstrate this comparative historical turn by applying it to revise the three foundational assumptions on IV in the context of Lebanon's Sunni community.

This first chapter explicates the Lebanese 'IV arena': a vital pre-requisite task that situates, contextualises, delimits, and informs the findings of the CHA – and a proposed remedy to the problem of diverse IV 'imaginaries' afflicting extant research (by focusing on types of process¹⁰²² and environment¹⁰²³, not types of actor¹⁰²⁴ or manifestation¹⁰²⁵). As later scholars extend this methodology to other case-studies, such explicated IV arenas will provide aids of comparison, allowing us to divine appropriate 'concepts with adjectives'¹⁰²⁶ essential to the task of delimitation and analogous reasoning.

Additionally, this chapter provides sufficient context for the reader unfamiliar with the case-study to comprehend the following analyses and explicates key middle-range theories used throughout the process-tracing¹⁰²⁷. I account for the origins and continuous reproduction of Lebanon's confessional tensions – which have been at the centre of the country's recurrent episodes of Sunni-perpetrated¹⁰²⁸ IV - alongside the volatile horizontal and vertical social contracts that repeatedly enflame them.

The chapter proceeds as follows: *Section 5.1.* overviews Lebanon's socio-political-historical development, highlighting the roots of confessional tensions (chiefly between Lebanon's Sunni and Maronite, and later Shi'a, communities), alongside the fundamental reservations, preoccupations, and anxieties that have

¹⁰²² E.g., ideological-popularisation preceding vs. following outbreak of violence (see Chapter 6 & 7), etc.

¹⁰²³ E.g., IV in a democracy vs. IV in a dictatorship, IV between communal groups vs. IV between class groups, etc.

¹⁰²⁴ E.g., Islamist IV vs. secular IV, etc.

¹⁰²⁵ E.g., terrorism vs. revolution vs. insurgency vs. civil war, etc.

¹⁰²⁶ Of the type introduced in the previous chapter, and discussed in George, and Bennett, *Case Studies*, 19-20; and Mahoney, "Qualitative Methodology," 127.

¹⁰²⁷ As noted in the previous chapter, these theories have been recalled as a result of inductive narrative analysis, rather than shaping those analyses.

¹⁰²⁸ The reader should be aware that my usage of the term 'perpetrated' is, in this context, not intended to imply any form of judgement or attribution of blame, and it should be stressed that there are rarely clear aggressors or instigators when conflict erupts in Lebanon.

shaped Sunni-Lebanese understandings of, and responses to, their circumstances and political developments. *Section 5.2.* conceptualises the novel ‘mechanics of contention’ in Lebanon: stressing the novel shape of Sunni-Lebanese society, alongside the mechanisms by which confessional identities and tensions are constantly reproduced/reactivated by Lebanon’s complex, unique and volatile horizontal and vertical social contracts.

5.1. Lebanon – historical overview/roots of conflict:

Absent spatial constraints, it would be helpful to provide a substantial descriptive overview of Lebanon’s history. It is sufficient for the purposes of this study, however, to provide the following summations:

5.1.1. Lebanon before Lebanon:

The Lebanese state was established by French decree in 1920¹⁰²⁹ as an explicitly multi-confessional state – comprising 18 self-aware confessional communities¹⁰³⁰ - based on proportional confessional power-sharing institutions¹⁰³¹. This power-sharing arrangement instituted Maronite Christians as the dominant community, based both on its (ostensible) numerical superiority¹⁰³² and its appeals for a Maronite homeland defensible against a perceivably hostile Sunni-dominated hinterland¹⁰³³. The balance of power would shift after the 1975-1990 civil war, institutionally dethroning the Maronites and elevating the Sunni community¹⁰³⁴. However, in practice, the Shi‘a community – through its paramilitary group, *Hezbollah* - came to dominate confessional relations¹⁰³⁵. For the Sunnis, Lebanon’s establishment was an affront to, and usurpation of, its traditional role as regional hegemon, and confessional relations in Lebanon would be

¹⁰²⁹ Technically, the state of *Greater Lebanon* was established in 1920, with the enduring *Republic of Lebanon* being declared in 1926 with the introduction of Lebanon’s constitution. See: Carman Geha, *Civil Society and Political Reform in Lebanon and Libya: Transition and Constraint* (Oxon: Routledge, 2016), 56. See also: Eduardo Wassim Aboultaif, *Power Sharing in Lebanon: Consociationalism since 1820* (Oxon: Routledge, 2019), 61; Kamal Salibi, *A House of Many Mansions: The History of Lebanon Reconsidered* (London: I.B. Tauris, 2002 [1988]), 17.

¹⁰³⁰ Bassel F. Salloukh et al., *The Politics of Sectarianism in Post-War Lebanon* (London: Pluto Press, 2015), 33.

¹⁰³¹ See below.

¹⁰³² Based on a deeply flawed 1932 census that excluded large numbers of non-Maronites while swelling Maronite numbers by including as residence the huge Maronite diaspora community. See: Rania Maktabi, “The Lebanese census of 1932 revisited. Who are the Lebanese?” *British Journal of Middle Eastern Studies* 26(2) (1999): pp. 219-241.

¹⁰³³ See below.

¹⁰³⁴ See Chapter 6.

¹⁰³⁵ Ibid.

characterised by mutual suspicion and resentment: Sunnis fearing subjugation, and Maronites – and later Shi‘as - fearing Sunni revanchism. As becomes apparent in Chapter 6, Sunni-Lebanese IV has, on all occasions, been rooted in this fear of subjugation and prompted by Maronite/Shi‘a attempts to cement their privileges against paranoia of Sunni revanchism. To understand (and de-essentialise) these dynamics, it is necessary to understand Lebanon’s pre-history:

Historically, the lands that would become Lebanon constituted part of *Bilad al-Sham*¹⁰³⁶; a territory that had – with brief interruptions¹⁰³⁷ – been ruled by successive Sunni dynasties since the 7th century Arab conquests; most recently the *Ottoman Empire* (c. 1516-1918). During this long history, relations between the dominant Sunnis and the region’s myriad religious minority communities had been capricious, ranging from formal or informal tolerance to persecution: In Sunni jurisprudence, Christian and Jewish communities were legally protected, if

¹⁰³⁶ Lebanon’s constituent territories were drawn from the *Wilayat of Beirut* (comprising the coastal cities of Tripoli, Beirut, Sidon and Tyre and their respective hinterlands), and the *Wilayat of Damascus* (comprising the Bekaa Valley) (Salibi, *A House of Many Mansions*, 25); all of which had deep commercial and kinship links to the Syrian hinterland (Tripoli in particular having deep links to Homs and Hama – see: Omer Einav, “Tripoli: A Syrian Heart in a Lebanese Body,” *Strategic Assessment* 17(4) (Jan., 2015), 30). However, the concept of a contiguous Syria was more nebulous than is often conveyed. As Phillip notes, geographical identities in the Arab lands were traditionally fluid and concentric – with an emphasis on decentralisation and local autonomy - the Arab lands being split into various (and changeable) Wilayats, and those Wilayats themselves being subdivided into “broadly recognised discrete sub-territories [...] [that] displayed a certain economic integration and a measure of political autonomy” often composed of a city and its linked agricultural lands. The idea of a contiguous Syria, while not completely alien to this system of traditional concentric identities, did not really popularise as a significant and discrete identity until the Egyptian occupation of the Syrian lands in the 1830s, which placed the Syrian territories under one single administrative unit for the first time. After the ejection of the Egyptian occupation in 1840, the Ottoman Empire continued to use the term, and the territory’s residents developed a greater consciousness of their shared Syrianness. See: Thomas Phillip, “Identities and loyalties in Bilād al-Shām at the beginning of the early modern period,” in *From the Syrian Land to the States of Syria and Lebanon*, eds. Thomas Phillip and Christoph Schumann, (Beirut: Ergon Verlag Würzburg in Kommission, 2004), 11-26.

¹⁰³⁷ By the Shi‘a *Fatimid Caliphate* (r. Syria 974-1076 and 1098-1099 CE) (Maher Y. Abu-Munshar, “Fātimids, Crusaders and the Fall of Islamic Jerusalem: Foes or allies?” *al-Masāq* 22(1) (Apr., 2010), 47); the *Crusader States* (r. Syria c. 1099-1291) (P.M. Holt, *The Crusader States and their neighbours* (Oxon: Routledge, 2016)); and, finally, the *Mongols*, who occupied various Syrian lands, on and off, in an ongoing war with the *Mamluks* between 1260 and 1323 (Paul M. Cobb, *The race for paradise: An Islamic History of the Crusades* (Oxford: Oxford University Press, 2014), 222-240). While parts or all of the lands that would become Lebanon did experience periods of rule by non-Sunnis (most famously the Druze *Ma‘nid dynasty* which forged an Emirate encompassing the future Lebanese lands and portions of the future Syria between c. 1590-1697, and the Maronite *Shihab dynasty* lasting from 1697-1840 spanning similar territories), these dynasties retained nominal and tributary fealty to the Sunni *Ottoman Empire*. See: Fawwaz Traboulsi, *A History of Modern Lebanon*, 2nd ed. (London: Pluto Press, 2012 [2007]), 5-12.

second-class, communities¹⁰³⁸ and, generally, Sunni rulers honoured this until the early 20th century¹⁰³⁹ (with the exception of the Maronite community who, ensconced in their Mountain refuge¹⁰⁴⁰, never submitted themselves to this protected status¹⁰⁴¹). Heterodox Muslims received no jurisprudential protection¹⁰⁴², but their experience under Sunni rule varied temporally and spatially¹⁰⁴³: pragmatic – if chauvinistic - toleration¹⁰⁴⁴, co-optation, and relative

¹⁰³⁸ This system was rooted in the Sunni Islamic concept of *dhimmitude*; in which ‘Peoples of the Book’ (Jews and Christians) were offered protection – albeit as second-class-citizens - and the right to religious practice (though public expressions of faith were often constrained) in return for recognition of Islamic sovereignty expressed through payment of the *jizya* poll tax (Maurus Reinkowski, “Ottoman ‘Multiculturalism’? The Example of the Confessional System in Lebanon,” A lecture given by Maurus Reinkowski, *Orient Institute of the Deutsche Morgenlandische Gesellschaft*, Istanbul, February 17th 1997. Available at: <https://freidok.uni-freiburg.de/fedora/objects/freidok:4403/datastreams/FILE1/content>, 2; Nicolas Pelham, *Holy Lands: Reviving Pluralism in the Middle East* (New York: Columbia Global Reports, 2016), 31). Under the Ottoman Empire, this was more firmly institutionalised under the *millet* system, in which each protected community (Jewish and Greek and Armenian Christian communities) were designated as ‘millets’: “semi-autonomous, administering its own co-religionists, raising its own taxes, and applying and enforcing its own religious laws” with the religious leaders of each community acting as intermediaries between the Ottoman states and their respective community. See: Pelham, *Holy Lands*, 29. See also: Karen Barkey & George Gavrilis, “The Ottoman Millet System: Non-Territorial Autonomy and its Contemporary Legacy,” *Ethnopolitics* 15(1) (2016), 24-26; Reinkowski, “Ottoman ‘Multiculturalism,’” 3.

¹⁰³⁹ This confessional social contract endured with only the most sporadic, isolated, and idiosyncratic exceptions until the 19th/early 20th centuries; with the subsequent breakdown most iconically and grimly symbolised by the First World War-era *Armenian* and *Assyrian* genocides – prompted by fears that the communities might serve as treasonous fifth columns for the invading ‘Christian’ Russian armies. See: Pelham, *Holy Lands*, 35.

¹⁰⁴⁰ See below.

¹⁰⁴¹ Hirst, *Beware of Small States*, 10.

¹⁰⁴² Heterodox Muslims, considered heretics by the Sunni religious establishment, were not afforded protection under the *dhimmi* or *Millet* systems. Moreover, during the Mamluk and Ottoman periods, a number of fatwas were issued sanctioning – if not demanding – the persecution of heterodox Muslim communities. Notably in 1305, the Shi’a and Alawite communities were designated as heretics and enemies of Islam by Sunni jurist Ibn Taymiyyah; in 1512, the jurist Hamza Sarua Görez issued a similar fatwa and urged the “sultan of Islam” to “kill all male heretics without accepting their repentance,”; and, in 1522, Ottoman punitive campaigns against the Druze were designated as a “religious war” by the Damascus ‘ulema. See: Stefan Winter, *The Shiites of Lebanon under Ottoman Rule, 1516–1788* (Cambridge: Cambridge University Press, 2010), 16 & 37; Leon T. Goldsmith, “The Politics of Sectarian Insecurity: Alawite ‘Asabiyya and the Rise and Decline of the Asad Dynasty of Syria,” PhD Diss., *University of Otago*, 2012, 6.

¹⁰⁴³ As Özerverli discusses, “Ottoman policies toward non-Sunni groups depended on circumstances [...] There was no fixed blanket strategy applied over all regions; policies tended to be adapted in accordance with local situations or incidents” (M. Sait Özerverli, “Between tension and rapprochement: Sunni-Shi’ite relations in the pre-modern Ottoman period, with a focus on the eighteenth century,” *Historical Research* 90(249) (Aug., 2017), 534). Likewise, Winter notes that “the Ottoman state, contrary to conventional assumptions, was ideologically too heterogeneous and politically too pragmatic to follow an actual policy against Shiism [and other heterodox Muslim communities] [...] instances of persecution by state authorities must be seen in their specific temporal and political context rather than assumed to be part of a universal anti-Shiite impulse” (Winter, *The Shiites of Lebanon*, 5).

¹⁰⁴⁴ Generally speaking, heterodox communities were ‘tolerated’ exploitatively – their existence being recognised as an important source of income for local authorities (through the institution of tax farming) – and as such were often left to their own devices (often enjoying relative autonomy) so long as they paid their taxes (Goldsmith, “The Politics of Sectarian Insecurity,” 95; Itamar

autonomy¹⁰⁴⁵ being the norm. Persecution – while not exceptional – was sporadic, idiosyncratic, and infrequent, generally occurring only during periods of Sunni paranoia provoked by external threats¹⁰⁴⁶.

These persecutions prompted certain communities to carve autonomous refuges in the region's inaccessible mountain ranges, including *Mount Lebanon*¹⁰⁴⁷. Communities so entrenched developed identities defined by the experience of communal enclavism against numerically superior, perceivably perpetual Sunni enemies beyond¹⁰⁴⁸ – with enduring consequences for confessional relations in modern Lebanon (although, as discussed below, such historical animosities would be of little consequence were they not actively reproduced/reactivated in the modern period). Of consequence for this study are the experiences of the Maronite and Shi'a communities:

5.1.1.1. *The Maronites:*

Rabinovich, "The Compact Minorities and the Syrian State, 1918-45," *Journal of Contemporary History* 14(4) (Oct., 1979), 694; Özervarli, "Between tension and rapprochement," 527). Nevertheless, such communities often endured discrimination and day-to-day humiliations: for example, the small number of city-dwelling Alawites were typically made to be unwelcome by the Sunni majority and excluded from partaking in city life (Mahmud A. Faksh "The Alawi community of Syria: a new dominant political force," *Middle Eastern Studies* 20(2) (1984), 138), while physical harassment was an everyday reality (Oded Haklai, "A minority rule over a hostile majority: The case of Syria," *Nationalism and Ethnic Politics* 6(3) (2000), 31).

¹⁰⁴⁵ Again, this often had a pragmatic-economic logic, with Sunni authorities frequently delegating to heterodox elites - Shi'a, Alawite, and Druze - responsibility for overseeing the tax-farming and general administration and policing of their own often restive and/or geographically-inaccessible communities (Salibi, *A House of Many Mansions*, 22; Kamal S. Salibi, "The Lebanese Identity," *Journal of Contemporary History* 6(1) (1971), 76; Sandra Mackey, *Lebanon: A House Divided* (New York: W.W. Norton & Company, 2006), 77; Shanahan, *The Shi'a of Lebanon*, 39; Winter, *The Shiites of Lebanon*, 31). Heterodox elites were also frequently co-opted as a means of *ad hoc* peace-making or divide-and-rule, bestowing titles upon some powerful or restive warlords to attain their cooperation and/or harness them to subdue other troublesome elites. This was particularly true of the Druze, who were particularly restive and troublesome, but showed value as local Emirs capable of pacifying both their own communities and others (Salibi, "The Lebanese Identity," 76; Michaela Pokrupová, "The Chameleon's Jinking. The Druze political adaptation in Lebanon," in *Beyond Globalisation: Exploring the limits of globalisation in the regional context (conference proceedings)* (Ostrava: University of Ostrava Czech Republic, 2010), 74).

¹⁰⁴⁶ See below.

¹⁰⁴⁷ Mount Lebanon – which became a refuge for both Maronite Christian and Druze Muslim communities – is the most famous such refuge, and is directly related to our own study, and thus is expanded upon below. Other notable mountain refuges included *Jabal Sahiliyah*, which became a refuge for the Alawite community after Sunni Seljuk Turkish persecution drove them from the cities of northern Syria (Goldsmith, "The Politics of Sectarian Insecurity," 66-67; Faksh "The Alawi community of Syria," 138); *Jabal al-A'la* and *Jabal al-Arab* – both of which became refuges for the Druze communities (alongside *Mount Lebanon*) (Winter, *The Shiites of Lebanon*, 37); and *Jabal Amil*, which became a refuge for Shi'a Muslims (Hirst, *Beware of Small States*, 12).

¹⁰⁴⁸ See below.

The Maronites initially fled to Mount Lebanon to escape fellow-Christian persecution¹⁰⁴⁹. However, they subsequently developed an animus towards Sunni Muslims, whose Caliphs – beginning with ‘Abd al-Malik (r. 685-705) and escalating with al-Mutawakkil (r. 847-861) – increasingly (albeit inconsistently) sought to constrain, humiliate, and subjugate Christian subject communities¹⁰⁵⁰. Such was Maronite fear of Sunni persecution that they alone among the region’s Christians welcomed and collaborated with the crusaders (1099-1291)¹⁰⁵¹ whom they perceived as saviours, only provoking further Sunni persecutions (the Mamluks launching several punitive pogroms against them following their expulsion of the crusaders)¹⁰⁵². As the crusader threat receded, however, the Maronites were un-molested and granted autonomy in return for tax payments¹⁰⁵³. Nevertheless, the experience of Sunni persecution became the central pillar of Maronite identity, to the extent that “fear consumes the Maronites [...] a dominant factor in their behaviour¹⁰⁵⁴”. It would be reawakened by events immediately prior to the establishment of the Lebanese state (see below).

5.1.1.2. *The Shi‘as:*

Shi‘a Muslim experiences under Sunni rule varied substantially. While discrimination was endemic, persecution occurred only during periods of external threat to Sunni hegemony; particularly the *Ottoman-Safavid* wars, in which Ottoman Shi‘as were suspected as potential fifth columnists for the Shi‘a Safavid Persians and endured punitive pogroms as a result¹⁰⁵⁵. However, as Winter

¹⁰⁴⁹ This persecution emanated both from the Romans (particularly Emperor Justinian II) who considered their Monothelite beliefs to be heretical (Aboultaif, *Power Sharing*, 44; Salibi, *A House of Many Mansions*, 5, 13 & 91; Juwaid Iqbal, “Sectarian strife in the Lebanon: Its historical roots,” *International Studies* 27(4) (1990), 310), and the Jacobite Christian community (Mackey, *Lebanon*, 34).

¹⁰⁵⁰ For example, Caliph al-Mutawakkil decreed that Christians and Jews affix wooden images of devils to the exteriors of their homes, level their ancestral graves, where distinctive dress, and ride only on mules - see: Mackey, *Lebanon*, 32-35.

¹⁰⁵¹ Ibid, 36 & 40; Salibi, *A House of Many Mansions*, 13; Kamal S. Salibi, “The Maronites of Lebanon under Frankish and Mamluk Rule (1099-1516),” *Arabica* 4(3) (Sep. 1957), 288.

¹⁰⁵² Such campaigns occurred in 1292, 1300, and 1305. Later, in 1365, further broader anti-Christian persecutions were launched by the Mamluks as collective Christian punishment for a raid launched against Alexandria by the Christian King of Cyprus – during which time the Maronite Patriarch was burnt at the stake. See: Salibi, “The Maronites of Lebanon,” 297 & 301.

¹⁰⁵³ Ibid, 302.

¹⁰⁵⁴ Mackey, *Lebanon*, 45.

¹⁰⁵⁵ Karen Barkey, “Islam and Toleration: Studying the Ottoman Imperial Model,” *International Journal of Culture and Society* 19(5) (2005), 10; Winter, *The Shiites of Lebanon*, 16; Özervarlı, “Between tension and rapprochement,” 530. Similar episodes followed the crusades and the Mongol invasions, whereby on each occasion the Shi‘as were scapegoated as supposed fifth columnists – see: Hirst, *Beware of Small States*, 12; Salibi, *A House of Many Mansions*, 14;

notes, “[Shi‘a] tradition [...] preserved the memory of the persecution[s] [...] as emblematic of the community’s fate under the [Sunnis]¹⁰⁵⁶”, building upon, and integrated into, a theology of Sunni persecution rooted in the martyrdom of Imam Hussain by usurping proto-Sunni *Umayyads* in 680. Nasr asserts that “the Shi‘a’s historical experience is [...] a millennium-long tale of martyrdom, persecution and suffering¹⁰⁵⁷”. Thus, they too sought refuge in Mount Lebanon and the neighbouring *Jabal Amil*¹⁰⁵⁸, “effectively bringing the [Shi‘as] into the Lebanese ‘mountain refuge’ community¹⁰⁵⁹”.

These communities, upon incorporation into the Lebanese state, carried these traumas with them, rendering them acutely sensitive to any suggestions of Sunni revanchism which, to their minds, could have only one conclusion. In their responses to such threat cues (see chapter 6), both exhibited what Bar-Tal and Antebi call “siege mentalities”, in which communities: 1) develop negative attitudes toward the perceived threatening group; 2) become ultra-sensitive to any potential threat cues emanating from that group; 3) increase pressure among ingroup members towards defensive conformity and solidarity; and 4) may respond to perceived threats with disproportionate force, believing all means are justified and necessary to protect against existential threats¹⁰⁶⁰. Such heightened, often disproportionate responses to threat cues perpetuate a ‘security dilemma’ (aka, ‘Hobbesian trap’)¹⁰⁶¹: the dominant community (Maronite and then Shi‘a)

Shanahan, *The Shi‘a of Lebanon*, 15; Kais M. Firro, *Inventing Lebanon: Nationalism and State under the Mandate* (London: I.B. Tauris, 2003), 16.

¹⁰⁵⁶ Winter, *The Shiites of Lebanon*, 7.

¹⁰⁵⁷ Vali Nasr, *The Shia Revival: how conflicts within Islam will shape the future* (New York: W.W. Norton and Company, Inc., 2007), 34. See also: Ron Geaves, *Aspects of Islam* (London: Darton, Longman and Todd, Ltd., 2005), 106; Rainer Brunner, “Shiism in the modern context: from religious quietism to political activism,” *Religion Compass* 3(1) (2009), 138; Assaf Moghadam, *Militancy and political violence in Shiism: Trends and patterns* (Oxon and New York: Routledge, 2011), 11; Muhammad al-Da‘mi, *The other Islam: Shi‘ism: From idol-breaking to apocalyptic Madhism* (Bloomington, IN: AuthorHouse, 2012), 84.

¹⁰⁵⁸ Hirst, *Beware of Small States*, 12; Shanahan, *The Shi‘a of Lebanon*, 15.

¹⁰⁵⁹ Winter, *The Shiites of Lebanon*, 36.

¹⁰⁶⁰ Daniel Bar-Tal and Dikla Antebi, “Siege Mentality in Israel,” *International Journal of Intercultural Relations* 16(3) (1992), 264-268; Daniel Bar-Tal and Dikla Antebi, “Beliefs about Negative Intentions of the World: A Study of the Israeli Siege Mentality,” *Political Psychology* 13(4) (Dec., 1992), 642-643.

¹⁰⁶¹ While my own usage of the ‘security dilemma’ concept is rooted in inductive conclusions drawn from our Sunni-Lebanese comparative historical analysis, it broadly conforms with the more established theory postulated by Posen, Lake and Rothchild, Tang, and Kaufmen, in which fear and uncertainty over an outgroup’s intentions produces anxieties over “being attacked, subjected, dominated, or annihilated by other groups [...] Striving to attain security from such attacks, they are driven to acquire more and more power in order to escape the effects of the power of others. This, in turn, renders the others more insecure and compels them to prepare for

unwilling to lower its guard for fear of Sunni revanchism, the subordinate Sunni community unwilling to lower its own for fear of Maronite/Shi'a subjugation or vengeance. As security dilemma theorists warn, such perceived mutual insecurity can drive arms races and posturing as "striving to attain security from such attacks, [each group is] driven to acquire more and more power [...]. This, in turn, renders the others more insecure and compels them to prepare for the worst¹⁰⁶²", producing "a toxic brew of distrust and suspicion that can explode into murderous violence¹⁰⁶³". I show in Chapter 6 how this repeatedly manifested, driving the Sunni community to seek ideological movement as saviours as part of this arms race, as their mainstream representatives failed to match their confessional opponents. Again, however, such communal states-of-mind are not immutable¹⁰⁶⁴, but must be continuously reproduced/reactivated – either by experience or design (see section 5.2).

5.1.2. Modern Lebanon, 1920-present:

We now establish why the Sunni community was so averse to its incorporation into the Lebanese state, and the conditions (or *Horizontal Social Contract* [HSC]) under which it finally acquiesced. This is important because real/perceived transgressions against that HSC (typically rooted in such 'siege mentality' responses) repeatedly activated the security dilemma by causing the HSC to appear untenable; driving the Sunni community to seek salvational ideologies/movements to overhaul or replace it.

the worst [...] trying to escape from the security dilemma by accumulating more and more power—generates a cycle of power competition" (Shiping Tang, "The Security Dilemma: A Conceptual Analysis," *Security Studies* 18(3) (2009), 590-591). Overlapping with 'siege mentalities', security dilemmas are often rooted in history, in that "What methods are available to a newly independent group to assess the offensive implications of another[?] [...] The main mechanism that they will use is history: how did other groups behave the last time they were unconstrained?" (Barry R. Posen, "The security dilemma and ethnic conflict," *Survival* 35(1) (1993), 30-31); "A history of ethnic domination [...] makes the hypothetical threat of extinction both plausible and frightening, and it identifies a specific other group as the source of the threat [...] [while] If one side was dominator but not dominated, the history can be used to justify a fear of revenge by the other group" (Stuart J. Kaufman, "Spiraling to Ethnic War: Elites, Masses, and Moscow in Moldova's Civil War," *International Security* 21(2) (Fall, 1996), 113). See also: David A. Lake and Donald Rothchild, "Containing Fear: The Origins and Management of Ethnic Conflict," *International Security* 21(2) (Fall, 1996): pp. 41-75.

¹⁰⁶² Lake and Rothchild, "Containing Fear," 42.

¹⁰⁶³ Herz, quoted in Tang, "The Security Dilemma," 590.

¹⁰⁶⁴ As noted in Bar-Tal and Dikla Antebi, "Siege Mentality in Israel," 252; and across the security dilemma literature (referenced above) which stresses the need to such reproduction and activation – discussed further in Section 5.2.

The impulse and rationale for a Lebanese state was set in motion in 1860, when communal violence broke out between Mount Lebanon's Maronite and Druze communities. Though initiated by the Maronites¹⁰⁶⁵, Druze retaliation slaughtered 10,000-15,000 community members¹⁰⁶⁶. Additionally, Maronites seeking refuge in Damascus were attacked by the Sunni population, who resented the Maronites for the ostentatious wealth they had acquired – perceivably at Sunni expense¹⁰⁶⁷ – through their preferential relations with European merchants¹⁰⁶⁸, resulting in

¹⁰⁶⁵ The historical developments that led to the 1860 conflict are too complex to condense into a footnote, and the source material is not always in agreement. However, essentially, the 1860 conflict constituted unfinished business from an earlier conflict occurring twenty years previously. In 1840, Maronite overlord of Mount Lebanon, Bashir III, called a meeting to settle Maronite-Druze tensions over the balance of power in Mount Lebanon (these tensions were themselves product of the Ottoman-Egyptian conflict of the 1830s). When Druze nobles arrived to the meeting accompanied by a large entourage, Bashir III, fearing aggressive intent, called on the Maronite community to take pre-emptive action. The Druze came off better from the conflict, and the peace-agreement arbitrated by the Ottoman Sultan and European powers instituted a "Dual sub-governance" which divided Mount Lebanon into separate Maronite and Druze districts. Yet the dividing line was arbitrary, with members of both communities caught on either side. Moreover, the violence of 1840 had left bad-blood between the two siege-mentality communities. By 1860, the Maronite community had resolved to cement their interests and security by initiating a second war, which they hoped would drive the Druze out of Mount Lebanon and provoke France – their long-time sympathetic ally - to establish a Maronite protectorate over the Mountain. See: Aboultaif, *Power Sharing in Lebanon*, 41-42; Rogan, *The Arabs*, 115-116; Alexis Heraclides and Ada Dialla, *Humanitarian Intervention in the Long Nineteenth Century: Setting the Precedent* (Manchester: Manchester University Press, 2015), 137; Davide Rodogno, *Against Massacre Humanitarian Interventions in the Ottoman Empire, 1815–1914: The Emergence of a European Concept and International Practice* (Princeton and Oxford: Princeton University Press, 2012), 98.

¹⁰⁶⁶ Rogan, *The Arabs*, 116; Heraclides and Dialla, *Humanitarian Intervention*, 137.

¹⁰⁶⁷ Ibid.

¹⁰⁶⁸ The breakdown of Sunni-Christian relations in the 19th and early 20th centuries is complex and multifaceted. However, it essentially boiled down to three developments, all linked to the increasing encroachment of the European powers in Ottoman affairs: Firstly, Christian – particularly Maronite – merchants grew ostentatiously wealthy during this period, perceivably at the expense of the Sunni traditional merchant class, as a result of the preferential treatment they received at the hands of European traders. European traders preferred to do business with indigenous Christians – largely out of religious affinity – while a system of 'capitulations' allowed European merchants to, among other things, 'adopt' indigenous Christians as 'protégés', under which they could evade trade tariffs etc., giving them an economic edge over their Sunni competitors. Secondly, for various reasons, European Consuls became more assertive in meddling in Ottoman internal affairs during this period – lobbying for westernising reforms (e.g., equal rights for all subjects, etc.) that were seen to disproportionately benefit Christians and undermine Islamic society more generally. Finally, Sunni-Christian relations broke down as a result of nationalist Christian revolts in the Balkans – often assumed to have been instigated by the European powers. The result of all these developments was that Christians were 1) resented for their newfound ostentatious wealth and 2) suspected of being more loyal to – if not active collaborators with - the threatening 'Christian' Europe than to the Ottoman Sultan. See: Johnson, *Class and Client*, 13 & 19; A. Massot, "Ottoman Damascus during the Tanzimat: The New Visibility of Religious Distinctions," in *Modernity, Minority, and the Public Sphere: Jews and Christians in the Middle East*, eds. S.R. Goldstein-Sabbah, and H.L. Murre-van den Berg (Leidan and Boston: Brill, 2016), 155-156, 161, 168; Albert Hourani, *The Emergence of the Modern Middle East* (Berkeley and Los Angeles: University of California Press, 1981), 62-66, 143; McMillan, *From the First World War*, 61-62, 90; Nikolas Van Dam, *The Struggle for power in Syria: Politics and Society under Asad and the Ba'th Party*, 4th ed, (London: I.B. Tauris & Co. Ltd., 2011), 4; Heraclides and Ada Dialla, *Humanitarian Intervention*, 136; Rodogno, *Against Massacre*, 46, 93-94; Rogan, *The Arabs*, 114, 117; Pelham, *Holy Lands*, 33-34; Salibi, *A House of Many Mansions*, 46.

another 5,000-10,000 deaths¹⁰⁶⁹. A French-led European intervention ensued, and negotiations followed with the Ottoman authorities to establish an autonomous zone to prevent further confessional hostilities¹⁰⁷⁰. A *Mutasarrifiya*¹⁰⁷¹ was declared over Mount Lebanon: an autonomous entity guaranteed by the European powers and administered by a confessionally-proportional Administrative Council headed by an Ottoman-appointed Christian governor¹⁰⁷². This power-sharing model – and its apparent success¹⁰⁷³ - provided the blueprint for France’s later establishment of Lebanon¹⁰⁷⁴. France’s pro-Maronite narrative on the 1860 massacres – coupled by what would follow during World War One – provided the impetus: When the Ottomans entered the war as Germany’s ally, they abolished the Mutasarrifiya and placed it under direct, military rule. Between allied blockade, Ottoman food expropriations, and a locust infestation, Mount Lebanon and its environs fell into famine, resulting in the deaths of one-third of the population, and the emigration of another third¹⁰⁷⁵. To the Maronites, 1860 and 1915-18 constituted proof that the Sunni persecutions of old were a perpetual threat¹⁰⁷⁶ and, when France occupied the Levant under the *San Remo Conference*, the Maronites lobbied them for their own state separate from the hostile Sunni-majority Syrian hinterland¹⁰⁷⁷.

¹⁰⁶⁹ Heraclides and Dialla, *Humanitarian Intervention*, 137; Don Peretz, *The Middle East Today*, 6th ed. (Westport: Praeger, 1994), 92.

¹⁰⁷⁰ The European powers were sympathetic to the Maronites while the Ottomans – anxious to avoid accusations of complicity in the Sunni-perpetrated massacres – complied. See: Heraclides and Dialla, *Humanitarian Intervention*, 139-140.

¹⁰⁷¹ Named after the *Mutasarrif* (governor) who would administer it (Salibi, *A House of Many Mansions*, 16).

¹⁰⁷² Specifically, the governor would be a non-Maronite, non-Mount Lebanon, non-Turkish Christian appointed by the Ottoman Sultan. Meanwhile the administrative council consisted of seven Christians and five Muslims (four Maronites, three Druze, two Greek-Orthodox, one Greek-Catholic, one Sunni, and one Shi’a) elected by the Sheikhs of each village in Mount Lebanon. the council’s role was advisory, with authority to veto tax increases and Ottoman troop deployments (Aboultaif, *Power Sharing in Lebanon*, 49).

¹⁰⁷³ The period of the Mutasarrifiya (1860-1915) is remembered as the “long peace”, enjoying “indigenous governmental apparatus with well-established administration, judicial and fiscal institutions, a centralized law enforcement agency, effective networks of communications and public services, and well-trained bureaucrats [...] [that] managed to be integrated into the European economy” (Ibid, 42).

¹⁰⁷⁴ Ibid, 5; Carman Geha, *Civil Society*, 55; Simon Haddad, “Lebanon: From Consociationalism to Conciliation,” *Nationalism and Ethnic Politics* 15(3-4) (2009), 402.

¹⁰⁷⁵ Aboultaif, *Power Sharing in Lebanon*, 59; Mackey, *Lebanon*, 106; Fawwaz Traboulsi, *A History of Modern Lebanon*, 2nd ed. (London: Pluto Press, 2012), 72.

¹⁰⁷⁶ Elizabeth Thompson, *Colonial Citizens: Republican Rights, Paternal Privilege, and Gender in French Syria and Lebanon* (New York: Columbia University Press, 2000), 21-28; Mackey, *Lebanon*, 106.

¹⁰⁷⁷ Salibi, “The Lebanese Identity,” 79; Rogan, *The Arabs*, 269; Mackey, *Lebanon*, 106; Aboultaif, *Power Sharing in Lebanon*, 61.

Problematically, a state confined to the Maronite-dominated Mount Lebanon would not be geographically/infrastructurally viable, and so it was proposed to annex the coastal cities of Beirut, Sidon, Tripoli, and Tyre, and the agricultural plains of Akkar and the Bekaa valley¹⁰⁷⁸ - annexations for which the Maronites claimed historical precedent¹⁰⁷⁹, but the Sunnis disputed¹⁰⁸⁰. Crucially, these territories had Sunni- and Shi'a-majority populations¹⁰⁸¹. Though problematic, France found the proposal desirable: rationally, as a means of cultivating an indigenous allied state as a bulwark against anti-colonial agitation¹⁰⁸² and, ideologically, due to Islamophobic crusader zeal¹⁰⁸³.

Initial elite and popular Sunni responses to Lebanon's establishment were rejection and resistance, manifested in repeated demands for incorporation into Syria¹⁰⁸⁴, boycotts of Lebanese institution-making processes¹⁰⁸⁵, petitions¹⁰⁸⁶,

¹⁰⁷⁸ Salibi, "The Lebanese Identity," 79; Mackey, *Lebanon*, 106; Hirst, *Beware of Small States*, 11.

¹⁰⁷⁹ For Maronite lobbyists, the annexations would restore Lebanon to the borders of the historical Maronite Shihabist Emirate of 1697-1840. See: Salibi, *A House of Many Mansions*, 25; Salibi, "The Lebanese Identity," 76; Hirst, *Beware of Small States*, 10; Aboultaif, *Power Sharing in Lebanon*, 62.

¹⁰⁸⁰ To the Sunnis, the Lebanese state was arbitrary at best, and a colonial imposition or even neo-Crusader state at worst (Salibi, *A House of Many Mansions*, 32; Iqbal, "Sectarian strife," 318; McMillan, *From the First World War*, 83).

¹⁰⁸¹ Of these new territories, the coastal cities of Beirut, Sidon, and Tripoli, alongside the arable Akkar plain, were predominantly Sunni, while the city of Tyre and the arable Bekaa valley were broadly Shi'a. Non-Maronite Christian communities were also present in large numbers, as well as the Druze community of Mount Lebanon. While the Mutassarifya of Mount Lebanon had held a minor Maronite majority (54%), the annexations shifted the balance, with the Maronites now constituting less than one third (according to French estimates of 1921, which were at pains to stress Maronite numbers). See: Aboultaif, *Power Sharing in Lebanon*, 61; Peretz, *The Middle East*, 365; Salibi, "The Lebanese Identity," 80.

¹⁰⁸² Iqbal, "Sectarian strife in the Lebanon," 317; Michael Provence, *The Last Ottoman Generation and the Making of the Modern Middle East* (Cambridge: University of Cambridge Press, 2017), 89; Mackey, *Lebanon*, 107.

¹⁰⁸³ General Henri Gourard, French administrator behind the establishment of Lebanon, was a devout Catholic who had imagined the war with the Ottoman Empire as a new crusade. In his estimation, there was a moral imperative to protect the region's Christians from Muslim "savagery" and "fanaticism", and a belief that Christian-dominated polities would help reform and civilise Islam's barbaric tendencies (Provence, *The Last Ottoman Generation*, 91 & 111). Greater Lebanon was imagined by both Maronite lobbyists and French colonial administrators as a historical refuge and haven for the region's minorities long persecuted by the Sunni majority (Salibi, "The Lebanese Identity," 85; Ussama Makdisi, "Reconstructing the Nation-State: The Modernity of Sectarianism in Lebanon," *Middle East Report* 200 (Jul.,–Sep., 1996), 25).

¹⁰⁸⁴ Aboultaif, *Power Sharing in Lebanon*, 61.

¹⁰⁸⁵ Notably, the Sunnis boycotted the 1921 census; the 1926 Lebanese constitution; the adopted of French as an official state language alongside Arabic; and the 1929 elections. Not until 1932, Kanaan notes, was any Sunni politician of significant standing prepared to cooperate with the Mandate authorities and begin to acknowledge the Lebanese state. See: Claude Boueiz Kanaan, *Lebanon 1860-1960: A Century of Myth and Politics* (London: Saqi, 2005), 126 & 130-132; Traboulsi, *A History of Modern Lebanon*, 90; Meir Zamir, *Lebanon's Quest: The Road to Statehood 1926-1939* (London: I.B. Tauris, 1997), 65; Iqbal, "Sectarian strife," 319.

¹⁰⁸⁶ Pipes, *Greater Syria*, 61.

demonstrations¹⁰⁸⁷, Sunni-Maronite communal violence¹⁰⁸⁸, anti-French insurgency¹⁰⁸⁹, and increased expressions of Sunni solidarity (e.g., increased Mosque attendance, celebration of Sunni holidays, etc.)¹⁰⁹⁰. This resulted from 1) resentment over the anti-Sunni, imperialist rationales for Lebanon's creation (its founding narrative being to establish a haven for the region's long persecuted religious minorities)¹⁰⁹¹; 2) its privileging of the Maronite community¹⁰⁹²; 3) the overt Maronite celebration of, and collaboration with, the French occupiers¹⁰⁹³; 4) dislocation from traditional kinship and economic links to the Syrian hinterland¹⁰⁹⁴; 5) its threats to the traditional privileges, prerogatives, and powers of the Sunni elite¹⁰⁹⁵; and 6) the subordination of the Sunnis to an 'upstart', 'treacherous' and likely-vengeful Maronite community¹⁰⁹⁶.

However, by the 1930s, the Sunni political-commercial elites (the *zu'amā'* class, discussed below) had begun to warm to a sovereign Lebanon. Lebanon was becoming a prosperous entrepôt and, with access to a share in this wealth through appointment to high-office, the Sunni *zu'amā'* realised their interests were better served as big fish within a small Lebanese pond, rather than small fish in the Greater Syrian lake¹⁰⁹⁷. Additionally, Sunni-Maronite relations improved in the 1940s as pragmatic Maronite *zu'amā'* turned on the French occupiers and cooperated with their Sunni counterparts to achieve

¹⁰⁸⁷ Ibid.

¹⁰⁸⁸ Johnson, *Class and Client*, 19; David Gilmour, *Lebanon: The Fractured Country* (London: Sphere Books Ltd, 1984), 66; Traboulsi, *A History of Modern Lebanon*, 104.

¹⁰⁸⁹ Pipes, *Greater Syria*, 62; Traboulsi, *A History of Modern Lebanon*, 77.

¹⁰⁹⁰ Pipes, *Greater Syria*, 61.

¹⁰⁹¹ See footnote 1207 above.

¹⁰⁹² For example, the Sunni and Greek Orthodox functionaries of the coastal cities were replaced by Maronites from Mount Lebanon, who occupied most senior official posts across the new administration; the Maronite President was awarded excessive powers with few confessional checks-and-balances; European merchants continued to privilege Maronite businesses; the French dominated the economy and awarded contracts overwhelmingly to Maronites who shared French concerns and had strong pre-existing ties with France; the French instituted the use of French language across governance, privileging in job allocation the increasingly Francophile Maronites, etc. See: Mackey, *Lebanon*, 109; Gilmour, *Lebanon*, 66; Traboulsi, *A History of Modern Lebanon*, 23; Firro, *Inventing Lebanon*, 76; Aboultaif, *Power Sharing in Lebanon*, 62-66.

¹⁰⁹³ Salibi, *A House of Many Mansions*, 32-33; Mackey, *Lebanon*, 107; Zamir, *Lebanon's Quest*, 10; Iqbal, "Sectarian strife," 320.

¹⁰⁹⁴ Gilmour, *Lebanon*, 65; Elizabeth Picard, *Lebanon: A Shattered Country – Myths and Realities of the Wars in Lebanon*, trans. Franklin Philip (New York: Holmes & Meier, 2002), 67; Traboulsi, *A History of Modern Lebanon*, 81; Firro, *Inventing Lebanon*, 83-84.

¹⁰⁹⁵ Thompson, *Colonial Citizens*, 16.

¹⁰⁹⁶ Gilmour, *Lebanon*, 66; Hirst, *Beware of Small States*, 11.

¹⁰⁹⁷ Aboultaif, *Power Sharing in Lebanon*, 61 & 70; Kanaan, *Lebanon*, 17, 132-133; Petran, *The Struggle*, 32; Mackey, *Lebanon*, 100; Johnson, *Class and Client*, 118; Peretz, *The Middle East*, 362.

independence¹⁰⁹⁸. This made both sides amenable to compromise and, in 1943, two leading zu‘amā’ – Maronite Bishara al-Khoury and Sunni Riyadh al-Suhl – formulated an informal power sharing agreement called the *National Pact*. The Pact enshrined confessional proportional representation and checks-and-balances which, while still privileging the Maronite community, seemed to guarantee the security, prosperity, and privileges of all communities. Notably, it ruled that the Presidency be reserved for a Maronite, the Prime-Ministership for a Sunni appointed by the President, and the Speakership of Parliament for a Shi‘a. Moreover, a ratio of six Christians to five Muslims was instituted in Parliament, cabinet positions and bureaucracy appointments. As a means of balancing the sentiments of the Maronite and Sunni communities – and ameliorating the security dilemma built upon Maronite fears of the Sunni-majority hinterland and Sunni distaste of Maronite links to the West - it was agreed that the Maronites would acknowledge Lebanon’s ‘Arab face’ and renounce all future alliances with Western powers, and in return the Sunnis would recognise Lebanese sovereignty and renounce demands for integration into a Pan-Syrian/Pan-Arab state¹⁰⁹⁹. Crucially, however, the Pact’s vague ‘Arab face’ stipulation was understood in different ways, Sunnis understanding it as a commitment to unity of purpose with other Arab states, and Maronites understanding it only as a symbolic concession to Sunni sentiments¹¹⁰⁰; relinquishing their own identification as non-Arab ‘Phoenicians’¹¹⁰¹.

The National Pact became the basis for Lebanon’s HSC, and perceived transgressions against it would be interpreted as transgressions against the HSC – as attempts at Maronite subjugation or Sunni revanchism. As chapter 6 reveals, this volatile formula would twice lead Lebanon’s Sunnis and Maronites to war, by

¹⁰⁹⁸ This pragmatic bloc within the Maronite zu‘amā’ had concluded that their community’s long-term interests could best be guaranteed not through continued, antagonistic French rule, but rather by cooperation and consensus with the Sunni zu‘amā’. See: Hirst, *Beware of Small States*, 41; Kanaan, *Lebanon*, 121 & 139; Mackey, *Lebanon*, 115.

¹⁰⁹⁹ Geha, *Civil Society*, 57; Aboultaif, *Power Sharing*, 61-62; Mackey, *Lebanon*, 113; Salloukh, et al., *The Politics of Sectarianism*, 17; Andrew Rigby, “Lebanon: Patterns of Confessional Politics,” *Parliamentary Affairs* 53(1) (Jan., 2000), 170; Caroline Attié, *Struggle in the Levant: Lebanon in the 1950s* (London: I.B. Tauris Publishers, 2004), 9.

¹¹⁰⁰ Attié, *Struggle in the Levant*, 9.

¹¹⁰¹ The Sunnis had particularly resented the Maronite identification as ‘Phoenicians’, an identity thesis explicitly meant to reject claims of their Arab identity and tie the Maronites culturally and historically to the West, with Lebanon considered the Eastern edge of the Western, Mediterranean world, in direct opposition to Arab claims of Lebanon as the Western edge of the Arab world. See: Aboultaif, *Power Sharing*, 58-69; Hirst, *Beware of Small States*, 10; Salibi, *A House of Many Mansions*, 27; Mackey, *Lebanon*, 43.

causing the Sunni community to view the HSC as ineffective in guaranteeing their security and interests and prompting them to seek out ideologies more fit for purpose.

5.2. The contemporary Lebanese 'IV arena':

This section conceptualises Lebanon's 'mechanics of contention': the socio-political structures, norms, and dynamics shaping and constraining the 'IV arena', notably the nature of Sunni-Lebanese society and the *Vertical Social Contract* [VSC] between its elites and mass base; the dysfunctionality and volatility of the VSC-HSC nexus; the reproduction/reactivation of confessional identities and traumas; and the fragile '*status quo* realism' fundamental to maintaining it. An explicated understanding of such is essential for conducting, situating, and delimiting this research.

5.2.1.1. *Sunni-Lebanese society:*

Scholars of Lebanon often caution against applying western social models to Lebanese society¹¹⁰² (e.g., Marxist divisions of society into bourgeoisie, petit-bourgeoisie, and proletariat¹¹⁰³, etc.). Accordingly, following Johnson¹¹⁰⁴ and others, I conceptualise Sunni-Lebanese society as follows:

5.2.1.1.1. *Zu'amā' [sing. za'im]:*

Each confessional community is headed by its respective commercial-political elite class or zu'amā'¹¹⁰⁵ – broadly divisible into rural feudal landowning¹¹⁰⁶ and

¹¹⁰² See, for example: Johnson, *Class and Client*, 18; Kanaan, *Lebanon*, 26; Fuad I. Khuri, "The changing class structure in Lebanon," *Middle East Journal* 23(1) (Winter, 1969), 29.

¹¹⁰³ Although, as seen in Chapter 7, Lebanese Marxists would themselves adopt such nomenclature – with reasonable validity – in the 1960s and 70s.

¹¹⁰⁴ Johnson, *Class and Client*, 18 & 46.

¹¹⁰⁵ The term zu'amā' had a disputed etymology, but its broadly considered a Turkish, Ottoman-era term referring to 'feudal dignitaries' (Geha, *Civil Society*, 52) or 'spokesperson' (Tine Gade, "The reconfiguration of clientelism and the failure of vote buying in Lebanon," in *Clientelism and Patronage in the Middle East and North Africa: Networks of Dependency*, eds. Laura Ruiz de Elvira, Christoph H. Schwarz, and Irene Weipert-Fenner (London: Routledge, 2018), 149). As will be seen, however, the modern usage of the term far exceeds this rather limited origin.

¹¹⁰⁶ The feudal landowning zu'amā' are hereditary descendants of Ottoman-era tax-farming class of nobility (supplemented by more modern entrepreneurs who had bought up land upon its becoming available with the late-Ottoman Empire's westernising reforms), who were then embraced as an "indigenous aristocracy" by the French colonial authorities and so retained in such capacities in the modern era (Michael Gilsean, "Domination as Social Practice: 'Patrimonialism in North Lebanon: Arbitrary Power, Desecration, and the Aesthetics of Violence'," *Critique of Anthropology* 6(1) (Apr., 1986), 20). His influence over his local constituents (peasants and/or share-croppers) is direct and broadly fixed, those constituents being reliant on the land the feudal zu'amā' own for their livelihoods. See: Hourani, *The Emergence*, 173; Shanahan, *The Shi'a of Lebanon*, 38; Samir Khalaf, "Primordial ties and politics in Lebanon," *Middle Eastern Studies* 4(3) (1968), 254.

urban commercial-oligarchical¹¹⁰⁷ breeds – who constitute a broadly hereditary¹¹⁰⁸ neo-aristocracy. They perform a quasi-feudal role as guarantors of the HSC (by promoting and protecting (and shaping¹¹⁰⁹) their community's interests and sentiments vis-à-vis rival communities) and as one poll of the VSC (extracting loyalty in return for guaranteeing the HSC and providing for the everyday needs of their communities – see below – in the face of a weak and aloof state).

5.2.1.1.2. 'Menu peuple':

At the other poll of the VSC are what Johnson calls the 'menu peuple': "‘little people’, the mass of urban [and rural] poor not fully differentiated into classes¹¹¹⁰", "those who are dependent on others for survival [...] [particularly zu‘amā’] patrons¹¹¹¹", "the people who depend economically on the commercial, administrative or landowning elites¹¹¹²". Incorporated within this diffuse mass are all those not included in the zu‘amā’ class¹¹¹³, who depend, for their everyday survival, upon the zu‘amā’s upholding of the VSC. In a broader explication of this class (in the context of 18th century French society), Skocpol asserts that the menu people are defined by their "concern about the price and sheer availability of basic necessities. [...] Basic anxiety [...] about affordable necessities [underlies all] popular political participation¹¹¹⁴". These menu people provide the

¹¹⁰⁷ The urban oligarchical zu‘amā’ owe their influence chiefly through their commercial ventures, through which they can both offer (and deny) employment opportunities and, through their wealth, offer welfare support and favours (see below). Unlike the rural zu‘amā’, whose influence is broadly fixed over those tied to their land, oligarchical zu‘amā’ must compete with rivals to secure and maintain such influence (Ibid).

¹¹⁰⁸ This is more by default than by institution, with influence begetting influence. Gilmour notes that, as of 1984, there were at least twenty zu‘amā’ families who had contributed more than one cabinet minister since 1920, while the largest Sunni zu‘amā’ of that time (the al-Sohl family of Sidon, Rashid Karami of Tripoli, and Saeb Salam of Beirut) had all inherited their support bases from their fathers (Gilmour, *Lebanon*, 35). Khalaf similarly notes that the Prime-Ministership "has usually been the preserve of four Sunni Muslim families, namely: Solhs, Karamis, Yafis and Salams" while "Other Ministerial positions are also associated with certain families and/or individuals" (Khalaf, "Primordial ties," 248).

¹¹⁰⁹ Shaping in that the establishment ideology influences the way the people understand their interests – see below.

¹¹¹⁰ Johnson, *Class and Client*, 18.

¹¹¹¹ Khuri, "The changing class structure," 36.

¹¹¹² Kanaan, *Lebanon*, 26.

¹¹¹³ Incorporating such diverse professions as sharecroppers, peasants, day labourers, dustmen, watchmen, barbers, leatherworks, servants, office workers, vegetable peddlers, craftsmen, tradesmen, apprentices, taxi-drivers, porters, small shopkeepers, stevedores, fishermen, journeymen, artisans, servants, etc. (Khuri, "The changing class structure," 36; Johnson, *Class and Client*, 18).

¹¹¹⁴ Skocpol, *States & Social Revolutions*, 187.

mass base for ideological movements, and thus constitute they key unit of analysis when studying IV.

5.2.1.1.3. *Qabadayat* [sing. *Qabaday*]:

Finally, *Qabadayat* – drawn from the menu people¹¹¹⁵ – are employed by the zu‘amā’ as intermediaries between the two classes (see below). They are local ‘strongmen’, often involved in illegal activities such as racketeering and smuggling¹¹¹⁶, but are valorised by their local communities as prototypical¹¹¹⁷ men of the people, exemplars and protectors of traditional, local masculine values, morality, and solidarities, defenders of the poor and vulnerable, and defenders of both the security, wellbeing, and honour of their local communities from geographical and confessional outsiders¹¹¹⁸. Johnson notes that, in the eyes of the menu people, the *Qabadayat*’s illegal and violent activities are those not of criminals but of Hobsbawmian ‘social bandits’¹¹¹⁹: individuals “considered by their people as heroes, as champions, avengers, fighters for justice, perhaps even leaders of liberation, and in any case as men to be admired, helped and supported¹¹²⁰ [...] [embodying] the ancient politics of Robin Hood faced with the Sheriff of Nottingham¹¹²¹”. *Qabadayat* play an essential role in IV: mobilising and leading their local communities in IV, and typically establishing the ideological tone of such mobilisations. For as long as they remain beholden to the zu‘amā’, they are themselves ideologically-informed by their patron. However, when the zu‘amā’ fail to uphold the VSC (see below), the *Qabadayat* become amenable to other ideological influencers.

5.2.1.2. *The VSC*:

¹¹¹⁵ Usually involved in such lower petit-bourgeois occupations as shopkeepers, butchers, taxi-drivers, petrol station owners, small businessmen, port workers, contractors, or bodyguards. See: S.N. Eisenstadt and L. Rongier, *Patrons, clients and friends: interpersonal relations the structure of trust in society* (Cambridge and New York: Cambridge University Press, 1984), 93.

¹¹¹⁶ Ibid; Johnson, *Class and Client*, 20.

¹¹¹⁷ See below.

¹¹¹⁸ Eisenstadt and Rongier, *Patrons*, 93 & 261; Johnson, *Class and Client*, 4 & 83; Gade, “The reconfiguration of clientelism,” 151.

¹¹¹⁹ Johnson, *Class and Client*, 83.

¹¹²⁰ Eric Hobsbawm, *Bandits* (London: Orion, 2010 [1969]) [Kindle], 20.

¹¹²¹ Ibid, 5.

The VSC consists of a (ultimately) transactional relationship between these three groups. Lebanon's is a laissez-faire capitalist system¹¹²² with weak central and municipal government and institutions. Lebanon suffers from a dearth of social security and essential services¹¹²³, compounded by an inefficient, regressive taxation system¹¹²⁴. In lieu of these deficits, the menu people depend on their local za'im to provide for their everyday needs: providing/facilitating employment; arbitrating disputes; providing financial assistance (subsidising medical or educational costs, food and money handouts, etc.); facilitating access to, and interceding in, appeals to formal bureaucracy (e.g., courts, welfare support, etc.)¹¹²⁵, etc. Additionally, zu'amā' use their influence in government (see below) to direct state largesse towards their constituents' needs (e.g., construction/infrastructure projects, themselves sub-contracted to client-run firms¹¹²⁶) or use their own wealth to provide essential services neglected by the state (e.g., schools, hospitals and clinics, loans, roads, electricity, drinking water¹¹²⁷, etc.). In return for these 'favours', the za'im expects loyalty manifested in votes, participation in protests/riots, serving in militias, or other favours¹¹²⁸. This aspect of the VSC creates a vulnerability as, should the zu'amā' default on providing such services (see below), the dependency of the menu people is such that they will likely gravitate to any ideological 'shadow states' capable of filling the vacuum¹¹²⁹.

The second aspect of the VSC is that the zu'amā' act as guarantors of the HSC – upholding Sunni political influence and honour against real/perceived attempts at subjugation by the dominant community. This is particularly important

¹¹²² Geared towards the interests of the zu'amā' class – see: Gilmour, *Lebanon*, 48; Rana Jawad, *Social welfare and religion in the Middle East: A Lebanese perspective* (Bristol: The Policy Press, 2009), 71; Melani Cammett, "Sectarianism and the Ambiguities of Welfare in Lebanon," *Current Anthropology* 56(11) (Oct., 2015), 77.

¹¹²³ Melani Cammett, *Compassionate Communalism: Welfare and Sectarianism in Lebanon* (Ithaca: Cornell University Press, 2014), 38; Gilmour, *Lebanon*, 11.

¹¹²⁴ Between government inefficacy, zu'amā' lobbying and corruption, and pervasive banking secrecy laws, Lebanon struggles to extract income or wealth tax, meaning that revenues are raised overwhelmingly by levelling duties on everyday commodities that overwhelmingly afflict the menu people while benefiting oligarchical enterprises. See: Gilmour, *Lebanon*, 10; and Salloukh et al., *The Politics of Sectarianism*, 7.

¹¹²⁵ Gilmour, *Lebanon*, 37; Geha, *Civil Society*, 52; Cammett, "Sectarianism," 78; Rana Jawad, "A Profile of Social Welfare in Lebanon: Assessing the Implications for Social Development Policy," *Global Social Policy* 2(3) (2002), 322; Shanahan, *The Shi'a of Lebanon*, 44.

¹¹²⁶ Gilmour, *Lebanon*, 37.

¹¹²⁷ Jawad, *Social welfare*, 1; Geha, *Civil Society*, 52; Cammett, "Sectarianism," 78-79.

¹¹²⁸ Cammett, "Sectarianism," 78; A. Hamzeh, "Clientelism, Lebanon: Roots and trends," *Middle Eastern Studies* 37(3) (Jul., 2001), 172; Khalaf, "Primordial ties," 258.

¹¹²⁹ See Chapters 6 & 7.

among the urban zu‘amā’¹¹³⁰ who compete with rival zu‘amā’ to present themselves as most capable and representative to the menu people. This often requires that, in addition to providing services, zu‘amā’ must rhetorically champion the causes and sentiments dear to the menu people¹¹³¹. However, as I shall elucidate, such threats – and such sentiments - are themselves largely manufactured and/or shaped by the HSC and zu‘amā’. This creates another vulnerability as, if the zu‘amā’ lose control of these manufactured threats and/or causes – to the extent that they are no longer willing or able to champion them – the menu people may look to movements who will¹¹³².

Finally, a separate but integrated contract exists between the zu‘amā’ and the qabadayat. Theirs is a transactional relationship, whereby the qabadayat – with their high social capital, influence, and intimate knowledge of local sentiments and solidarities – act as intermediaries and facilitators between the zu‘amā’ and menu people; channelling menu people demands to the zu‘amā’ (and facilitating access between the two), while aiding the za‘īm by channelling menu people loyalties to that za‘īm; organising the menu people to vote, demonstrate, riot, or fight for the za‘īm; and recruiting and running gangs to protect the za‘īm’s property or do his dirty work (coercion, intimidating rivals/rival’s qabadayat, supporters, etc.)¹¹³³. In return, the zu‘amā’ protect their qabadayat from police investigation of their criminal activities, provide financial incentives, aid them in competing with and even fighting rival qabadayat, and favour them with contracts, permits, etc¹¹³⁴. Again, this creates a vulnerability as, due to the transactional nature of the zu‘amā’-qabadayat relationship, the qabadayat may be amenable to outside competitors for their loyalty. This especially becomes the case if the zu‘amā’ default on their part of the bargain. Additionally, because the menu people depend on the qabadayat as

¹¹³⁰ This is because, unlike the rural zu‘amā’ who exercise direct dependency over their constituents by owning the land they work, the urban zu‘amā’ exist no such direct ties and must compete with rival zu‘amā’ from their own confessional group seeking to outbid them in services and protection – see footnote 1231 above, expanded upon below.

¹¹³¹ Johnson, *Class and Client*, 25; Gilmour, *Lebanon*, 38; Samir Khalaf and Guilain Denoëux, “Urban Networks and Political Conflict in Lebanon,” in *Lebanon: A History of Conflict and Consensus*, eds. Nadim Shehadi and Dana Haffar Mills (London: The Centre for Lebanese Studies in association with I.B. Tauris & Co Ltd., 1988), 183; Khalaf, “Primordial ties,” 257.

¹¹³² See Chapters 6 & 7.

¹¹³³ Hourani, *The Emergence*, 173; Johnson, *Class and Client*, 4 & 83; Eisenstadt and Rongier, *Patrons*, 93 & 261.

¹¹³⁴ Ibid.

intermediaries and facilitators (and respect them as communal heroes), they tend to follow the qabaday to his new patron.

5.2.1.3. *The basis of zu‘amā’ influence:*

These vulnerabilities exist because the zu‘amā’s ability to fulfil these functions is contingent on HSC stability: the zu‘amā’ obtaining most of the funds required to finance their operations through appointment to political office. Such appointments grant the za‘īm access to state largesse distributable as patronage to his clients, either directly (through favours and charitable institutions) or indirectly (through directing funds to local infrastructure projects and sub-contracting those projects to clients, etc.)¹¹³⁵. Thus, while the HSC balances confessional security concerns for the menu people, it moreover balances confessional *economic* concerns for the zu‘amā’. Resultantly, loss of access to such largesse results in an inability to uphold their end of the VSC, leaving a dependent menu people open to encroaching rival zu‘amā’ or, more dangerously, well-resourced movements and/or HSC-VSC-transcending ideologies.

5.2.2. HSC-VSC nexus contradictions:

The HSC-VSC nexus is dysfunctional for several reasons and, as I contend in chapters 6-7, Lebanon’s recurrent IV episodes have, at root, been products of these contradictions. Specifically:

5.2.2.1. *The VSC requires both HSC stability and tension to function:*

Because the VSC depends on the zu‘amā’s access to state largesse, the VSC will collapse if the HSC ceases to function properly (i.e., if one community monopolises access to state institutions, denying zu‘amā’ from other communities’ access to largesse). However, simultaneously, the VSC depends – for several reason - on manufacturing HSC tension to retain legitimacy:

- 1) Lebanon’s immense wealth disparities, dependencies, corruption, and inefficiencies are liable to produce class resentments against the zu‘amā’.
It is thus expedient for the zu‘amā’ to divide-and-rule, deflecting vertical

¹¹³⁵ Hamzeh, “Clientelism,” 172; Salloukh et al., *The Politics of Sectarianism*, 46; Gilmour, *Lebanon*, 37-38.

class animosities into horizontal confessional ones¹¹³⁶, by which the zu‘amā’ reaffirm their indispensability as champions striving to ensure their community receives the same socioeconomic privileges as rival communities. Simultaneously, their failures in achieving such socioeconomic justice etc. can be conveniently attributed by the spoiling actions of rival confessional communities.

- 2) By heightening the security dilemma, the zu‘amā’ can exercise legitimacy purely as defenders of their community vis-à-vis confessional rivals while minimising the need for ‘programmatic legitimacy’ (e.g., procedural justice, progressive reforms, etc.) that might challenge their vested interests¹¹³⁷.
- 3) Some zu‘amā’ find it expedient to heighten the security dilemma as a means of bolstering their standing vis-à-vis rival intra-confessional zu‘amā’, adding another dimension (alongside socioeconomic support) by which they might ‘outbid’ their rivals by posturing as superior strongmen able to protect the community from confessional enemies¹¹³⁸.

For these reasons, the zu‘amā’ – across confessions – are incentivised to reproduce/reactivate sectarian animosities/security dilemmas:

5.2.2.2. *Reproduction/reactivation of confessional identities and traumas:*

Confessional tensions are reproduced actively and passively:

Active activation includes invoking confessional narratives as explanations for upheavals and grievances – examples of which feature throughout chapters 6 and 7. For traumatised communities such as the Maronites and Shi‘a, this additionally involves portraying calls for reform as attempts at Sunni revanchism, invoking past ‘chosen traumas’ to rally their constituents into a defensive phalanx around their persons¹¹³⁹.

¹¹³⁶ Johnson, *Class and Client*, 132; Kanaan, *Lebanon*, 4 & 200; Adham Saouli, “Sectarianism and Political Order in Iraq and Lebanon,” *Studies in Ethnicity and Nationalism* 19(1) (2019), 75; Salloukh et al., *The Politics of Sectarianism*, 2-3 & 7.

¹¹³⁷ Salloukh et al., *The Politics of Sectarianism*, 3; Khalaf, “Primordial ties,” 248-250.

¹¹³⁸ Bar-Tal and Antebi, “Beliefs about Negative Intentions,” 109; Kaufman, “Spiraling to Ethnic War,” 109.

¹¹³⁹ Vamik D. Volkan, “Transgenerational Transmissions and Chosen Traumas: An Aspect of Large-Group Identity,” *Group Analysis* 31(1) (2001), 79 & 87; Vamik D. Volkan, “Large-Group Identity, Large-Group Regression and Massive Violence,” *Proceeds from the 13th European Symposium in Group Analysis ‘Between Matrix and Manuals’* Sponsored by the Group Analytic Society (London) and the Institute of Group Analysis (Norway), Molde, August 2005. Available at: https://www.researchgate.net/publication/250028018_Large-group_psychodynamics_and_massive_violence, 17.

Passive reproductions include: 1) discourses of ‘co-existence’, a discursive sleight-of-hand that appears to denounce confessional conflict while simultaneously affirming that confessional tensions exist and require regulating by the HSC-VSC nexus¹¹⁴⁰; 2) confessionally-segregated education, in which children grow up not interacting with other confessional communities while absorbing curriculums that reify confessional difference and tension¹¹⁴¹; 3) zu‘amā’ control over media, which both reifies confessional narratives and demonises or suffocates attempts at cross-confessional solidarity¹¹⁴²; 4) confessional homogenisation of neighbourhoods¹¹⁴³; and 5) a ‘neo-milletist’ civil-law system, in which intra-confessional marriage is hobbled and all administrative and bureaucratic activities are governed by confessional actors that reify confessional differences and competition¹¹⁴⁴.

5.2.2.3. *Consequences of the primacy of confessional identity and dysfunctional HSC-VSC dynamics:*

This manufactured confessional solidarity and horizontal tension creates a volatile situation:

Firstly, it encourages the menu people to view their interests through a confessional lens, often meaning that manoeuvres by the zu‘amā’ to instrumentalise confessional tensions can outrun them and lead the menu people to embrace destabilising rather than expedient ideological attitudes – such as feeling solidarity with confessional ideological movement actors inimical to zu‘amā’ interests¹¹⁴⁵. Under such conditions, the zu‘amā’ may, in the eyes of those menu people, default on their role as representatives of their interests and sentiments if they do not also support those ideological actors, prompting a search for alternative, more representative leaders who will.

¹¹⁴⁰ Geha, *Civil Society*, 52; Saouli, “Sectarianism,” 75.

¹¹⁴¹ Johnson, *Class and Client*, 47; Geha, *Civil Society*, 50; Rigby, “Lebanon,” 172; Cammett, “Sectarianism,” 85; Nassif Hitti, “The Republic of Lebanon,” in *Politics and Government in the Middle East and North Africa*, eds. Tariq Ismael and Jacqueline Ismael (Miami: Florida International University Press, 1991), 215; Haddad, “Lebanon,” 40; Salloukh et al., *The Politics of Sectarianism*, 49.

¹¹⁴² Janine A. Clarke and Bassel F. Salloukh, “Elite Strategies, Civil Society, and Sectarian Identities in postwar Lebanon,” *International Journal of Middle East Studies* 45 (2013), 741; Salloukh et al., *The Politics of Sectarianism*, 64; Haddad, “Lebanon,” 40.

¹¹⁴³ Kanaan, *Lebanon*, 26.

¹¹⁴⁴ Cammett, *Compassionate Communalism*, 38; Geha, *Civil Society*, 50-52; Salloukh et al., *The Politics of Sectarianism*, 33-35.

¹¹⁴⁵ E.g., prompting them to identify with outside players (e.g., Nasser in the 1950s, IS more recently), who directly threaten the *status quo* and the zu‘amā’s interests. See Chapter 6 and 7.

Similarly, zu ‘amā’ efforts to enflame the security dilemma to buttress the VSC may backfire if they fail to protect their communities/the HSC when those manufactured tensions spill over into conflict (usually by prompting a security dilemma/siege mentality response from the dominant community). This opens the door to other actors claiming greater willingness/capability to fulfil that role, including destabilising, intractable radical movements. We can elucidate upon this dynamic by familiarising ourselves with the theory of prototypical leadership¹¹⁴⁶, which I return to throughout chapters 6-7: According to this theory (and affirmed by empirical observations from Lebanon), when individuals identify primarily as members of their community (and against a perceivably threatening outgroup), leaders of those communities can default to ‘prototypical’ leadership styles¹¹⁴⁷: rather than achieving legitimacy through ‘conventional’ means (procedural justice, socioeconomic success, etc.), they can achieve positive appraisals from their followers merely by demonstrating “strong group commitment - a desire to strengthen the group’s identity and performance vis-a-vis other groups” and strong identification with, and “liking for”, the group¹¹⁴⁸. Under such conditions, prototypical leaders are not beholden to the same standards of appraisal as non-prototypical leaders, being instead assessed more on their prototypicality than on their actual behaviour¹¹⁴⁹ or material success¹¹⁵⁰. Göncü notes that prototypical leaders not only enjoy greater “licence to fail” than non-prototypical leaders, but also that communities are more likely to attribute the failings of prototypical leaders to factors beyond their control, rather than their own capabilities, personalities, or policies – as is the case with non-prototypical leaders¹¹⁵¹. Problematically, however, should these leaders then sacrifice their prototypicality (e.g., by proving unwilling to represent the community’s sentiments, through demonstrations of self-servitude, etc.), followers may seek out more prototypical leadership. This is typically to be found in more zealous,

¹¹⁴⁶ Michael J. Platow and Daan Van Knippenberg, “A Social Identity Analysis of Leadership Endorsement: The Effects of Leader Ingroup Prototypicality and Distributive Intergroup Fairness,” *Personality and Social Psychology Bulletin* 27(11) (Nov., 2001): pp. 1508-1519.

¹¹⁴⁷ Ibid, 1516; David de Cremer and Mark van Vugt, “Intergroup and Intragroup Aspects of Leadership in Social Dilemmas: A Relational Model of Cooperation,” *Journal of Experimental Social Psychology* 38 (2002), 127.

¹¹⁴⁸ Ibid.

¹¹⁴⁹ Niels Van Quaquebeke, et al., “More than meets the eye: The role of subordinates’ self-perceptions in leader categorization processes,” *The Leadership Quarterly* 22 (2011), 367.

¹¹⁵⁰ Aslı Göncü, “The Social Identity Analysis of Leadership, and Propositions for Future Research: An Integrative Review,” *The International Journal of Management and Business* 2(2) (Dec., 2011), 34.

¹¹⁵¹ Ibid, 31.

radical, confessional, and anti-establishment leaders – such as violent movements – as they demonstrate even greater commitment to, and liking for, the group.

Finally, realist security dilemma fears may be augmented by social-psychological ones. Tyler and Blader's *Group Engagement Model*¹¹⁵², which I again return to in chapters 6-7, proposes that social groups activated around a particular salient identity (e.g., Sunni-Lebanese) respond to 'identity information' dictating their 'group pride' (i.e., whether their community is respected as strong, influential, admirable, etc. by other communities) and 'group respect' (i.e., whether they, as individuals, are respected and valued by their community/leadership)¹¹⁵³. Should either of these dimensions prove lacking, it provides 'negative identity information', which can provoke remedial action. Communal leaders are important sources for such identity information, in that they project group strength vis-à-vis outgroups (satisfying group pride) and convey dignity to group members by treating them with respect and value (satisfying group respect). Thus, should extant leaders (e.g., the zu'amā') fail in these endeavours (by not defending the group and its honour from external threats and/or by not treating clients with respect through representing their needs and sentiments), then the menu people may look elsewhere for leadership that can – including ideological movements. Considering my discussion on prototypical leadership, it stands to reason that more 'extreme', prototypical leaders will have an edge in any resulting leadership contests, due to their high "liking" for the group (respect) and zealous defending of the group - and denigration of outgroups – (pride). Similarly, ideologies/movements can enhance group pride/respect in two other ways. Firstly, through 'identity parameter change' (e.g., identifying as a smaller group of 'true' Sunnis to escape pride/respect tarnishing behaviour by 'flawed' Sunnis¹¹⁵⁴ or, conversely, identifying as a broader group of global 'Sunnis' (rather than 'Sunni-Lebanese') to escape the pride/respect tarnishing position of being a subordinate and disempowered Lebanese community, (identifying instead with a strong and powerful global

¹¹⁵² Tom R. Tyler, and Steven L. Blader, "The Group Engagement Model: Procedural Justice, Social Identity, and Cooperative Behavior," *Personality and Social Psychology Review* 7(4) (2003): pp. 349-361.

¹¹⁵³ Ibid.

¹¹⁵⁴ This may go some way to explaining the 'Takfiri' impulse of some salafi-jihadist groups.

Sunni Ummah¹¹⁵⁵), etc). Secondly, through ‘self-pedestaling’ (e.g., by identifying as a morally-superior ingroup vis-à-vis a morally-repugnant outgroup – e.g., as victims vs. oppressors).

5.2.3. ‘*Status quo* realism’:

This differs from the establishment ideological ‘hegemony’ of Marxist/Gramscian theory (in which the menu people are conditioned to view the establishment ideology as good, natural, and even common-sense)¹¹⁵⁶, in that the menu people are often conscious of the establishment ideology’s flaws, limitations and injustices. This is demonstrated by repeated popular calls for the abolition of the confessional system (notably in 1975¹¹⁵⁷; 2011-12¹¹⁵⁸; 2015¹¹⁵⁹; and 2020¹¹⁶⁰); and the fact that the zu‘amā’ discipline individuals seeking to opt-out of the confessional establishment ideology in favour of more conventional political

¹¹⁵⁵ E.g., Lebanese Sunnis eschewing their ‘Sunni-Lebanese’ identity (where they are subordinated by their Shi’a co-nationals) in favour of identifying as part of an international Sunni Ummah, enjoying kinship with, for example, the vast wealth of the Gulf, or the heroic jihadists of the SAOM.

¹¹⁵⁶ As discussed in Chapter 2.

¹¹⁵⁷ During the Two-Year War, discussed in Chapters 6 and 7.

¹¹⁵⁸ 2011 and 2012 saw several movements inspired by the broader 2011 Arab uprisings. *Laique Pride* pre-existed the uprisings but was rejuvenated by them. It demanded an end to the confessional system. However, it failed to rally popular support, rallying just 20,000 at its largest protest in March 2011 (Martin Wählisch and Maximillian Felsch, “Introduction,” in *Lebanon and the Arab uprisings: in the eye of the hurricane*, eds. Martin Wählisch and Maximillian Felsch (Oxon and New York: Routledge, 2016), 2; Meier, “Popular Mobilizations,” 181). More popular – spanning early 2011-2012 – was the *The People want the fall of the sectarian regime* protest movement, which adapted its name in direct reference to the broader ‘Arab Spring’ and, like *Laique Pride*, demanded an end to confessionalism (Mikdashy, “Lebanon,” 267; Kraidy, “Trashing the sectarian system?” 20). Finally, *Take back Parliament* emerged in 2012 and continued until summer 2013, in pursuit of the same demands (Mouna Maaroufi, “Can Lebanon’s secular youth take back the parliament?” *Heinrich-Böll Stiftung Middle East* (Sep., 2013 – Jan., 2014), 3).

¹¹⁵⁹ 2015 saw the *YouStink!* protest movement. Sparked by a garbage crisis resulting from political deadlock between Lebanon’s March 14th and March 8th political blocs (the two blocs refusing to agree on a contract for waste removal in Beirut), the scandal was seized upon as symbolic of the broader corruption and inefficiency of Lebanon’s confessional system, and demonstrators called for its abolition. See: Kraidy, “Trashing the sectarian system?”; Herzog, “Nothing but a demonstration?”

¹¹⁶⁰ In many ways a continuation of 2015’s *YouStink!* movement, the massive protest movement beginning in October 2019 and continuing sporadically up until the time of writing seized upon a proposed tax on *Whatsapp* (‘the one thing in Lebanon that works’) as another symbol of the incompetence and corruption of the confessional system. Amidst economic crash, rising costs of living, etc., one sixth of the Lebanese population took to the streets to demand an end to confessionalism. See: Abby Sewell, “How Lebanon’s ‘WhatsApp tax’ unleashed a flood of anger,” *The World*, dated October 24 2019. Accessed January 1 2021. Available at: <https://www.pri.org/stories/2019-10-24/how-lebanons-whatsapp-tax-unleashed-flood-anger>; Abbie Cheeseman and Finbar Anderson, “Lebanon’s people are finally rejecting their country’s entrenched political elite,” *The Conversation*, dated October 28 2019. Accessed January 1 2021. Available at: <https://www.newstatesman.com/world/middle-east/2019/10/lebanons-people-are-finally-rejecting-their-countrys-entrenched-political>

projects¹¹⁶¹. However, generally, the reproduction of the confessional security dilemma leaves them resigned that the establishment ideology – with its horizontal checks-and-balances - constitutes the only viable means of organising state and society¹¹⁶². However, as Chapter 6 reveals, this means that when the establishment ideology (the HSC-VSC nexus) proves incapable of guaranteeing even those basic security needs, the menu people are often far more easily rendered amenable to – or even dependent on – ideologies/movements than would be the case if that establishment ideology had achieved ‘hegemony’ and was thus considered ‘common-sense’ by the population: The establishment ideology needs only to appear untenable for other options to become attractive.

5.3. Conclusion:

With this conceptual framework in place, we are now equipped to proceed with the CHA of Sunni-Lebanese IV episodes.

¹¹⁶¹ By refusing them aid or intercession, blocking them from employment and other opportunities, etc. See: Khuri, “The changing class structure,” 40; Salloukh et al., *The Politics of Sectarianism*, 4 & 7.

¹¹⁶² What Soltau described as “depressed fatalism,” (Irene C. Soltau, “Social Responsibility in the Lebanon”, *International Affairs* 25(3) (Jul., 1949), 307) and Johnson describes as a sense of resentment owing to their being “forced by the system to become individually beholden to the za’im” (Johnson, *Class and Client*, 3).

Chapter 6: On the causation of Sunni-perpetrated ideological violence in Lebanon: The 1958 *Lebanese Crisis*, 1975-6 *Two-Year War*, and 2012-2014 *Sunni Insurrections* in comparative historical perspective.

6.

This chapter commences my CHA demonstration by asking of the three episodic IV case-studies the first of our empirical research questions: *What role did the justificatory ideology/ideological movement play in the causation of the violence?* (*à la* foundational assumption 1).

The chapter proceeds as follows: *Section 6.1.* presents the causal model as derived from CHA of the three IV episodes. *Sections 6.2., 6.3. and 6.4.* substantiate this model by demonstrating how each episode informed – and fits into – it. I conclude by condensing these findings into a concise, abstracted statement/hypothesis on what these case-studies – contextually-bounded – suggest about IV causation (prior to exploring how a future research agenda might help generalise/delimit/refine that hypothesis in the concluding chapter).

6.1. On the causation of Sunni-Lebanese IV – conceptual model:

This model suggests that Lebanon's recurrent episodes of Sunni-perpetrated IV follow a cyclical, interconnected pattern, characterised by repeated breakdowns in, followed by restorations of, the country's volatile HSC-VSC nexus. Specifically, this 'IV cycle' comprises five stages: 1) the *status quo interbellum*; 2) *consensus breakdown*; 3) *ideological competition*; 4) *escalation into violence*; and 5) '*conflict resolution*'. This cycle suggests a complex, dialectical causal role for ideologies/movements, as I elucidate.

6.1.1. Status quo interbellum:

IV episodes are preceded and followed by periods of *status quo interbellum*. Less peace and harmony than resigned acquiescence to '*status quo realism*'¹¹⁶³, such periods are characterised by relative functionality of the HSC-VSC nexus and, by extension, relative endorsement/acceptance of the establishment ideology they

¹¹⁶³ As discussed in Chapter 5.

constitute¹¹⁶⁴. *Status quo* realism is reflected in the moral authority bestowed by the menu people upon their zu‘amā’ who, during such periods, are habitually, largely-uncritically, trusted and deferred to and, as such, monopolise loyalty, information, propaganda, and narratives.

Restorations of the *status quo* interbellum following IV episodes are facilitated and characterised by four dynamics:

6.1.1.1. *Lowest-common-denominator modus vivendi:*

The *modus operandi* for restoring peace/establishment ideological-acquiescence following IV episodes resembles a computer’s ‘system restore’ function. Rather than overhauling the volatile HSC-VSC nexus (which had made consensus breakdown possible in the first place¹¹⁶⁵), the zu‘amā’, with their vested interests in restoring the *status quo*, attempt to restore the nexus to the last point in which it functioned satisfactorily – usually by making redistributive tweaks to the HSC (rebalancing prerogatives and quotas) and by easing the security dilemma by finding common ground on key issues (see below). The result is a lowest-common-denominator horizontal and vertical *modus vivendi* that retains the same potentials for consensus breakdown.

Status quo restoration begins with HSC restoration, achieved by soothing the security dilemma to a point whereby the subordinate community no longer feels subjugated, vulnerable, and disempowered, and the dominant community no longer fears challenges to their rights and privileges by the subordinate communities. This is achieved in two main ways:

The first is through cross-confessional unity of purpose in foreign policy, which conceals communal differences of interest, power imbalances, and feelings of communal impotence, subjugation, and vulnerability in several ways: Firstly, unanimity on policy prevents subordinate community elites having to challenge those of the dominant group (and, in doing so, risk revealing their

¹¹⁶⁴ As discussed in Chapter 5, I deliberately refrain from using the Gramscian terminology of ‘hegemony’ at this stage, as hegemony suggests unquestioning endorsement of the establishment ideology as ‘common-sense’. However, as we shall discover, both the pacifying dynamic of *status quo* realism and the process of *status quo* realism breakdown are remarkably similar to that of Gramscian hegemony and organic crises, respectively.

¹¹⁶⁵ As introduced in Chapter 5 and expanded upon throughout this chapter.

impotence and subordination). Additionally, unity of purpose suggests all groups share mutual interests and values, and so are unlikely to be threats to one another, which in turn reduces opportunities for security dilemma exaggeration by competing zu‘amā’, while enhancing efforts towards cross-confessional, national identity and solidarity.

The second is through restoration of adequate political representation for all communities, which again conceals communal power imbalances and feelings of communal impotence and subjugation, while securing the consensus and acquiescence of the Sunni zu‘amā’ (by restoring their privileges alongside access to state largesse needed to uphold the VSC). This both motivates and equips the zu‘amā’ to encourage acquiescence at the popular level and placates the menu people by restoring funding to the zu‘amā’ patronage networks upon which they depend for their everyday needs. Additionally, the security dilemma, and communal tensions more broadly, are soothed because a return to ‘genuine’ power-sharing appears to demonstrate good will, ‘respect’¹¹⁶⁶, and cooperation on behalf of the dominant community towards subordinate communities. As is demonstrated below, the negation of these equilibriums have been central to Lebanon’s repeated consensus breakdowns and resulting episodes of Sunni-perpetrated IV.

This HSC restoration facilitates VSC restoration, as unity of purpose and adequate political representation helps restore the menu people’s faith in their zu‘amā’s ability to represent and defend their needs, interests, and sentiments (furthered by the above-noted restoration of zu‘amā’ patronage networks). With the VSC restored, the menu people broadly defer to their zu‘amā’ for information, narratives, and leadership – having been given no reason to doubt it (or at least to find it sufficiently unsatisfactory to motivate revolt). Once again, breakdowns in these systems of representation and provision have been central to Lebanon’s cycles of Sunni-perpetrated IV – see below.

6.1.1.2. *Status quo realism:*

Modus vivendi is further facilitated by a return to *status quo* I realism, which reinforces resigned establishment ideology acquiescence and deferment to

¹¹⁶⁶ Both generally and in the *social identity theory* sense outlined in the previous chapter.

zu‘amā’ narratives and leadership as 1) the menu people lose faith in the ideology/movement that made revolt appear feasible/fruitful and 2) trauma/war-weariness from that revolt convinces most belligerents that imperfect peace is preferable to war’s anarchy and carnage. This results in renewed willingness (or resignation) to attempt to make the best of the imperfect *status quo* (or else descent into demoralised apathy), rather than attempting to strive for a better alternative.

6.1.1.3. *Permissive underlying environment for IV:*

Conflict resolutions neglect to address underlying permissive conditions; notably vertical and horizontal socioeconomic inequalities, government corruption, inefficient/insufficient service provision, social security, etc. – all variables conducive to IV in progressive paradigm literature¹¹⁶⁷. However, in periods of *status quo* interbellum, functioning zu‘amā’ patronage networks generally meet the basic needs and social security of the menu people, taking the edge off – though not eradicating – deprivation and resentment. Thus, such macroscopic grievances are *insufficient* to promote IV, but *necessary* in conjunction with what follows¹¹⁶⁸:

6.1.1.4. *Marginal presence of ideologies/movements:*

Extant movements attempt to generate support through various strategies of ‘vanguard activism’¹¹⁶⁹, but struggle against *status quo* realism/HSC-VSC functionality, thus remaining marginal and largely intellectual in their following. With most menu people deferring to, and dependent upon, the zu‘amā’ – with their vested interests in the *status quo* – such movements are generally met not only with disinterest, but often zu‘amā’-manufactured hostility¹¹⁷⁰. Below, I identify the processes that later enable them to break through the establishment’s defence mechanisms.

¹¹⁶⁷ See Chapters 2 and 3, respectively.

¹¹⁶⁸ As discussed further in the conclusion of this chapter and the concluding chapter of the dissertation, this finding can help us to reconcile, bridge, and reconstrue a leading deductive summation grounding the conservative paradigm’s *foundational assumptions* on IV causation: the claim that IV cannot be caused by extant grievances, because macroscopic grievances more typically promote apathy rather than revolt (see Chapter 1).

¹¹⁶⁹ Ibid.

¹¹⁷⁰ Ibid. See also the dynamics outlined in Chapter 5, notably demonisation of ideological movements by zu‘amā’-controlled media, punishment of individuals who refuse to toe the establishment ideology line, etc.

6.1.2. Consensus breakdown:

IV occurs when this modus vivendi becomes strained. Across these episodes this has occurred in a uniform fashion:

6.1.2.1. *HSC breakdown:*

Periodically, Lebanon has been confronted by domestic or external ‘consensus crises’: events, developments, or *causes de jour* that force the government to choose sides on a politically-contentious issue. Consensus crises become volatile when they pit confessional communities against one another, as it strains the above-noted facilitators of HSC restoration/maintenance¹¹⁷¹. Several straining dynamics converge:

- 1) The HSC becomes strained if the state/dominant community aligns itself antagonistically to the sentiments/interests of subordinate communities; causing the latter to feel disempowered, subordinated, and subjugated through their inability to influence crucial decision-making or defend important positions.
- 2) State/dominant community support for the subordinate community’s perceived enemies/hostility towards their perceived comrades indicates ill/conflicting will. Disunified communal groups begin regarding one another as holding inimical/hostile interests – increasing the likelihood that they will become threats to one another (thus enflaming the security dilemma). Moreover, hostility to the *cause de jour* can become conflated with hostility towards the subordinate community identifying with it.
- 3) Resulting inter-communal animosities can escalate if either community acts recklessly to defend its interests. Subordinate community opposition to the state’s *cause de jour* position can enflame the security dilemma by prompting dominant community fears of revolt/subversion. This in turn may provoke dominant communities to take action (often disproportionate¹¹⁷²) to cement their hegemony¹¹⁷³, which can itself

¹¹⁷¹ Particularly unity of purpose in foreign affairs.

¹¹⁷² Especially with ‘siege mentality’ afflicted communities such as Lebanon’s Maronites and Shi’as – as noted in chapter 5.

¹¹⁷³ Often involving such actions as direct repression (particularly if they dominate the state’s military or security services), constitutional and extra-constitutional gerrymandering, political marginalisation of the subjugated group, etc.

provoke 'arms races' (literally or metaphorically¹¹⁷⁴) as both sides rush to defend their interests from the others' perceived hostility.

Each community's stance towards the *cause de jour* should not be understood as a product of *ideological persuasion*. These stances are ideologically-influenced (in that they are shaped by diagnostic, prognostic, and solidarity frames, etc.), however they are formed prior to ideological-popularisation, instead being conditioned by the establishment ideology which – as noted in chapter 5 – both conditions community members to perceive their interests through a confessional lens and depends on a modicum of manufactured HSC tension to legitimise the VSC. Moreover, these framings can be catered for by both the establishment ideology and various competing anti-establishment ideologies¹¹⁷⁵. Therefore, they are not dependent on – and may in fact be altered by - the ideology under which revolt eventually mobilises (see below).

6.1.2.2. VSC Breakdown:

VSC breakdown can be facilitated directly by the consensus crisis, or as a knock-on effect of the HSC breakdown:

The consensus crisis can promote VSC breakdown directly if menu people interests/sentiments clash with those of their *zu'amā'*. Under such circumstances, the *zu'amā'* must choose between championing their constituents' interests/sentiments at the expense of their own, or else defend those interests at the VSC's expense¹¹⁷⁶. Often, the *zu'amā'* attempt to evade both options by deflecting blame onto the dominant community (e.g., recasting vertical class cleavages as horizontal confessional cleavages) – furthering the HSC breakdown.

Alternatively/simultaneously, the 'arms races' frequently promoted by HSC breakdowns can promote subordinate community VSC breakdown if that community's *zu'amā'* are outperformed/marginalised by their dominant community counterparts (thus revealing their inability/unwillingness to defend and promote the rights, interests, and security of their constituents). Moreover, if the

¹¹⁷⁴ In the metaphorical sense, this might include such actions as constitutional manoeuvrings, public relations campaigns, posturing, alliance-making, etc.).

¹¹⁷⁵ See Chapter 7.

¹¹⁷⁶ Or at the expense of losing their constituents to a rival *za'im* who is prepared to champion the menu people's interests/sentiments.

dominant community politically side-lines subordinate community elites to secure their own hegemony, the VSC suffers as 1) subordinate community zu‘amā’ appear only to hold power at the pleasure of the dominant community, rendering them essentially beholden, toothless, and even complicit and 2) they lose access to the state largesse vital to their upholding of the VSC. This humiliation of subordinate community zu‘amā’ can, moreover, have a knock-on effect on their constituents, diminishing group ‘pride’ and ‘respect’ which, as noted in chapter 5, can prompt violent remedial action by community members.

HSC-VSC breakdowns – like Gramscian ‘organic crises’ – can result in the menu people viewing the *status quo* as untenable, and their zu‘amā’ untrustworthy, unreliable, and/or unrepresentative. In such circumstances, *status quo* realism is all that stands in the way of complete establishment ideology rejection (in that, even when alienated from their zu‘amā’ and the establishment ideology, there still appears no viable alternative to them). This can change, however, if an ideological movement presents itself as a viable alternative to the zu‘amā’ and the establishment ideology.

6.1.3. Ideological competition:

As noted, consensus breakdown is *necessary* but not *sufficient* to promote sustained anti-establishment ideology revolt (only localised, sporadic, but ultimately directionless fits of ‘rage’ demanding redress *within* the establishment ideology’s framework¹¹⁷⁷). For sustained, anti-systemic revolt envisioning extra-establishment ideology solutions, an ideology/movement is required to subvert *status quo* realism by proposing viable alternative systems alongside viable leadership, resources, and strategies for achieving that change. Again echoing Gramsci, these organic crisis-like consensus breakdowns provide windows of opportunity for thus far marginal movements to do this.

Ideological-popularisation is explored in chapter 7. However, it is necessary here to clarify the role played by ideologies/movements in IV causation. As noted, – and as chapter 7 elucidates - movements often pre-exist

¹¹⁷⁷ Along the lines of what Tilly described as “contentious performances” and Tarrow characterised as “non-modular collective action”, such episodes of collective action vent frustration over localised and isolated grievances but do not follow an ideology or attempt to bring about systemic change. See: Tilly, *Contentious Performances* and Tarrow, “Modular Collective Action,” respectively.

the consensus breakdowns during which they popularise, yet their mass bases do not. Only in times of VSC strain do they acquire opportunities to win mass support, by exploiting the resulting material, leadership, and ideological vacuums to establish themselves as relevant – even essential - actors in the political field. They achieve this through both pragmatic and ideological appeals:

Pragmatically, they fill the material vacuum left by VSC collapse by providing 1) essential everyday services and provisions previously catered for by zu‘amā’ patronage networks¹¹⁷⁸ and 2) physical protection against real/perceived dominant community attempts to violently assert their hegemony, after the zu‘amā’ have proven unable/unwilling to do so. This enables them to outbid the zu‘amā’ by presenting themselves as more capable, zealous, and genuine representatives, which both increases popular support for that movement and its project and increases popular resentment towards the zu‘amā’, whose incompetence and/or lack of integrity is emphasised by the relative competence and integrity of the movement.

Ideologically, VSC collapse degrades zu‘amā’ monopolies on information and political narratives, granting movements voices and credibility normally constrained by zu‘amā’ censorship and/or demonisation (and popular deferment to it). By coming between the menu people and their zu‘amā’ materially, movements garner visibility and respect within the social fabric, facilitating their subversion of the already-crisis-stricken establishment ideology (the validity of which is now reduced to *status quo* realism) by demonstrating that alternative, viable leadership and systems do exist, allowing them to enter serious ideological competition with the establishment for the first time. They do this by:

- 1) Providing new, compelling diagnostic frames through which the menu people might understand their circumstances and (re)delineate friend from foe¹¹⁷⁹;
- 2) Proposing superior alternative systems alongside viable strategies for realising them. These prognostic frames moreover increase anti-

¹¹⁷⁸ In particular, this includes essential service and social security provision, arbitration and even employment – see chapter 7.

¹¹⁷⁹ Often involving a re-evaluation as to whether their own zu‘amā’ may in fact be villains rather than co-victims of the menu people.

establishment/zu‘amā’ resentment by providing new standards against which to measure their performance and merits¹¹⁸⁰.

- 3) Providing capable, zealous, and prototypical¹¹⁸¹ leadership in periods of heightened group identity salience, who – in addition to organising, coordinating, resourcing, and motivating sustained anti-establishment revolt - also offer alternative/redeemed social identities that enhance group ‘pride’ and ‘respect’¹¹⁸².

As these movements become increasingly popular, powerful, and confrontational, they may provoke establishment defenders (typically the dominant community) into further antagonistic measures to defend their hegemony - further straining the HSC, discrediting the incapable/unwilling zu‘amā’/bankrupt VSC, and escalating the path towards violence. Simultaneously, increasing movement influence further erodes the VSC as the zu‘amā’ - caught between an increasingly threatening confessional ‘enemy’ they must resist in order to sustain the VSC, and a movement rivalling it in that role with a political project that would annihilate the VSC entirely - must either pay lip service to the ideology/movement (and risk empowering their own grave-diggers), or defend the *status quo* from the movement (and risk completely alienating their constituents, rendering the VSC void anyway).

Finally, regarding perpetrator motives, we should not assume a stratified IV imaginary - à la extant paradigm syntheses – differentiating pre- and post-consensus breakdown ideological/movement adherents. As chapter 7 elucidates, the reality is far more nuanced and complex.

6.1.4. Escalation into violence:

Eventually, this cycle of antagonisms and alienations reaches breaking point, and successful¹¹⁸³ movements find themselves well positioned to assume leadership

¹¹⁸⁰ Here our opening quotation by George Orwell comes to mind: “The masses never revolt of their own accord, and they never revolt merely because they are oppressed. Indeed, so long as they are not permitted to have standards of comparison, they never even become aware that they are oppressed” (Orwell, *Nineteen Eighty-Four*, 237).

¹¹⁸¹ See Chapter 5.

¹¹⁸² Ibid.

¹¹⁸³ I.e., successful in the ideological competitions following consensus breakdown – see chapter 7.

when, after one too many provocations, (usually spontaneous) armed conflict between establishment defenders and challengers (manifesting as conflict between subordinate and dominant communities) erupts. Rationales and demands are couched ideologically, but belligerence and solidarity are typically manifested, perceived, and aligned communally, as dominant community members – whatever their actual ideological sympathies – are assumed defenders of the establishment. This furthers communal tensions as individuals potentially sympathetic to the movement (or at least its grievances) are pushed by subordinate community paranoia to realign with their own community. Movements thus become communally homogenous (or at least exclusive of certain communities perceived to naturally align with the establishment defenders), which yet further enflames the security dilemma and confessional animosities to existential levels.

6.1.5. 'Conflict resolution' and restoration of the *status quo* interbellum:

As noted, peace results not from any comprehensive conflict resolution (i.e., addressing systemic fragilities and permissive conditions, reconciling communal animosities, etc.) but from force of arms, moral and/or physical exhaustion of the belligerents, and/or the fading relevance of the prompting consensus crisis. Moral exhaustion, as noted, includes a loss of faith in the willingness/ability of the ideology/movement to deliver upon its promises (see Chapter 7), ushering in a new period of *status quo* realism (and zu'amā' dependence). This 'peace' provides sufficient stability for incremental, horizontal concessions (redistributive HSC tweaks) to be made between the warring communities. This restores the HSC which, as noted, aids VSC restoration by concealing once again zu'amā' impotence/unrepresentativeness while restoring their access to state largesse. This new modus vivendi holds until a new consensus crisis emerges to shatter the HSC-VSC nexus once again, and new ideologies/movements popularise to shatter *status quo* realism and propose a better alternative to it.

6.2. **The 1958 Lebanese Crisis:**

The *Lebanese Crisis* refers to six months of countrywide violence occurring from May-October 1958, involving an estimated 5,000-20,000 rebel combatants¹¹⁸⁴. While the conflict involved dispirit pro- and anti-establishment coalitions¹¹⁸⁵ – different factions aligning for different reasons¹¹⁸⁶ – the Sunni menu people, who constituted the bulk of the anti-establishment coalition’s foot-soldiers, fought primarily¹¹⁸⁷ to force Lebanon’s incorporation into the newly-formed *United Arab Republic* [UAR]¹¹⁸⁸; a political project rationalised by the *Pan-Arab Nationalist* ideology represented at that time by Egyptian President Nasser.

6.2.1. *Status quo* interbellum:

The *status quo* interbellum preceding the *Lebanese Crisis* originated in the cross-confessional, anti-French independence struggle of the 1940s¹¹⁸⁹. As noted, this period of Sunni-Maronite unity of purpose witnessed the quasi-institutionalisation

¹¹⁸⁴ This lower figure was given by US military intelligence estimates at the time, while the higher figure was given by the Lebanese government at the time and was corroborated by a UN Observation Team. See: Attié, *Struggle*, 187 & 190.

¹¹⁸⁵ The pro-*status quo* coalition, lead by incumbent President Camille Chamoun, included the state gendarmerie; the paramilitary, Lebanese Nationalist, Maronite *Kataeb* Party (aka the ‘Phalange’); the Pan-Syrian SSNP; and select zu‘amā’ from across the confessional divide, usually following realist incentives (see footnote 3). The anti-*status quo* *National United Front*, headed chiefly by the main Sunni zu‘amā’ and influential Druze za‘īm Kamal Jumblatt, included the constituents of those zu‘amā’ fighting directly under their command, in addition to ABSP; CPL; a variety of Sunni populist associations (most notably the *al-Najjādeh* Party, the *Muslim Young Men’s Union*, *al-Hayāt al-Waṭaniyyah*, and the *al-Maqāṣid College Alumni Association*); and assorted and variously-motivated cross-confessional zu‘amā’. See: John Pierre Entelis, *Pluralism and Party Transformation in Lebanon: Al-Kataeb, 1936-1970* (Leiden: E. J. Brill, 1974), 78; Irene L. Gendzier, *Notes from the Minefield: United States Intervention in Lebanon, 1945-1958* (New York: Columbia University Press, 2006), 239 and 249; Kanaan, *Lebanon*, 230; Attié, *Struggle*, 157; Raghid el-Solh, *Lebanon and Arabism: National Identity and State Formation* (London: I.B. Tauris Publishers, 2004), 316; Karol R. Sorby, “Lebanon: The Crisis of 1958,” *Asian and African Studies* 9(1) (2000), 106; Theodor Hanf, *Coexistence in Wartime Lebanon: Decline of a State and Rise of a Nation* (London: I.B. Tauris in Association with the Centre for Lebanese Studies, 2015), 76-99; and Arnold Hottinger, “Zu‘amā’ and Parties in the Lebanese Crisis of 1958,” *Middle East Journal* 15(2) (Spring, 1961), 137.

¹¹⁸⁶ For example, the SSNP – despite their pan-Syrian ideology – aligned with Chamoun both to oppose a rival Nasserite pan-Arabism which they perceived to be a trojan horse for Sunni chauvinism and also in the hope of gaining political recognition, protection and influence by siding with the regime (Hanf, *Coexistence*, 76; Gendzier, *Notes from the Minefield*, 239). Meanwhile, Maronite za‘īm Suleiman Frangieh sided with the anti-*status quo* forces on account of his family’s personal feud with the family of President Chamoun (Mackey, *Lebanon*, 50) while Druze za‘īm Majid Arslan sided with Chamoun as a means of opposing his chief rival for influence over the Druze community, anti-*status quo* za‘īm Kamal Jumblatt (Gendzier, *Notes from the Minefield*, 249).

¹¹⁸⁷ The CPL – operating independently from, and antagonistically towards, the Sunni zu‘amā’ - had significant influence in a number of Sunni neighbourhoods in Beirut and Tripoli, and entered the revolt on a platform of deposing Chamoun who they accused of pursuing ultra-capitalist and pro-imperialist policies - Michael W. Suleiman, “The Lebanese Communist Party,” *Middle Eastern Studies* 3(2) (1967), 142.

¹¹⁸⁸ See below.

¹¹⁸⁹ Kanaan, *Lebanon*, 121; Mackey, *Lebanon*, 115; John P. Entelis, “Party transformation in Lebanon: Al-Kata’ib as a case study,” *Middle Eastern Studies* 9(3) (1973), 326; and Hirst, *Beware of Small States*, 41.

of Lebanon's HSC-VSC nexus under the 1943 National Pact. True to my model, this period of relative peace and harmony was facilitated by the confluence of several factors:

6.2.1.1. *Lowest-common-denominator modus vivendi:*

Between Lebanese independence (1943) and the *Lebanese Crisis* (1958), the National Pact – with its stipulations on confessional representation in government¹¹⁹⁰ and prohibitions against Western alliances and anti-sovereignty agitation¹¹⁹¹ - provided concrete criteria by which the Lebanese people could measure adherence to, and the viability of, the HSC. Until 1955, the Sunni men could broadly evaluate this adherence and viability favourably:

Firstly, Lebanon enjoyed unity of purpose in foreign policy. True to the National Pact's 'Arab face' stipulation, Lebanon's first post-independence President, Bishara al-Khoury (r. 1943-1952), avoided a potential consensus crisis over the recently-commenced *Arab-Israeli conflict*¹¹⁹² by contributing militarily to the 1948-9 *Arab-Israeli War* and toeing the subsequent Arab line of eschewing peace treaties with Israel following the conflict¹¹⁹³. Simultaneously, al-Khoury upheld the Pact's pledge to eschew alliances with Western powers by rejecting Anglo-French overtures to join a *Regional Security Plan* in 1947¹¹⁹⁴.

Additionally, until 1951, President al-Khoury maintained a positive partnership with Sunni PM Riyadh al-Suhl¹¹⁹⁵. Al-Suhl, Beirut's foremost Sunni za'im, wielded sufficient political leverage to effectively check-and-balance al-

¹¹⁹⁰ Aboultaif, *Power Sharing*, 61.

¹¹⁹¹ Attié, *Struggle*, 9.

¹¹⁹² The *Arab-Israeli conflict* could easily have become a deadly consensus crisis for Lebanon. This is because, while Lebanon's Sunnis perceived Israel to be both an imperialist stooge and an existential enemy of the Arabs and Muslims, many Maronites – including former President (from the Mandate era) Émile Eddé, the influential Maronite paramilitary and political Kataeb Party and high-ranking members of the Maronite clergy - had sought close relations – even alliances – with the new Israeli state; which they perceived as a kindred people, sharing mutual interests and values as westernised minorities threatened by an Arab, Muslim sea. Open conflict was avoided because President al-Khoury perceived that Maronite security would be better served by placating the country's non-Muslims, rather than by allying with a foreign power against them: see: Mackey, *Lebanon*, 115; Hirst, *Beware of Small States*, 25-26; Benny Morris, "Israel and the Lebanese phalange: The birth of a relationship, 1948–1951," *Studies in Zionism* 5(1) (1984), 130; and Eyal Zisser, "The Maronites, Lebanon and the State of Israel: Early Contacts," *Middle Eastern Studies* 31(4) (Oct., 1995), 889-890.

¹¹⁹³ Hitti, "The Republic of Lebanon," 224.

¹¹⁹⁴ *Ibid*, 224.

¹¹⁹⁵ This would likely have continued, were it not for al-Suhl's assassination, in 1951, by SSNP gunmen, who were avenging al-Suhl's crushing of an attempted SSNP coup in 1949 - see below. (On the assassination itself, see: Rogan, *The Arabs*, 346).

Khoury's Presidential prerogatives¹¹⁹⁶, thus seeming to demonstrate the National Pact's viability for protecting Sunni political representation/interests/sentiments. Accordingly, Lebanon's HSC held firm, even as other political crises rocked the country (see below), helping to prevent any breakdown in confessional relations or the VSC.

Simultaneously, and largely facilitated by these dynamics, the Sunni VSC held during this period. The lack of inter-confessional foreign policy disputes precluded any need for the Sunni zu'amā' to confront their Maronite counterparts (and risk demonstrating their inferiority), while – absent inhibiting conflicts with the Maronites – they enjoyed several opportunities to demonstrate their political clout: In 1949, when the *Syrian Social Nationalist Party* [SSNP] attempted a coup to incorporate Lebanon into a *Greater Syria*¹¹⁹⁷, al-Suhl was credited for crushing it (to the extent he was targeted for a revenge assassination by the SSNP in 1951)¹¹⁹⁸. Incidentally, the fact al-Suhl was applauded for crushing a Pan-Syrian coup by constituents who had so recently clamoured for a pan-Syrian union¹¹⁹⁹ is testament to the degree of menu people deferment to their zu'amā' for political narratives during this period. Additionally, in 1952, a cross-confessional 'Rose Water Revolution' deposed President al-Khoury over his corruption and crony capitalism¹²⁰⁰. That Sunni zu'amā' – cooperating closely with their Maronite and Druze counterparts – were able to play a prominent role in deposing the president¹²⁰¹ further demonstrated both their strength and the respect, influence, and cooperation they were afforded by their Maronite counterparts. Additionally, the Sunni zu'amā's uninhibited access to political office buttressed the VSC by enabling their patronage networks¹²⁰².

6.2.1.2. *Status quo* realism:

¹¹⁹⁶ Attié, *Struggle*, 59.

¹¹⁹⁷ An ideological project that had been recently revived by an officer's coup in Syria following the botched *First Arab-Israeli War*. See: Traboulsi, *A History of Modern Lebanon*, 115-16.

¹¹⁹⁸ Mackey, *Lebanon*, 72.

¹¹⁹⁹ See Chapter 5.

¹²⁰⁰ Traboulsi, *A History of Modern Lebanon*, 125-6.

¹²⁰¹ Particularly Sami al-Suhl, brother of slain former PM Riyadh al-Suhl – Ibid, 126.

¹²⁰² This was particularly exemplified by the affluence of the *Maqasid Society* (aka the *Islamic Society of Benevolent Intentions*) which provided otherwise unaffordable and/or inaccessible schooling, healthcare, and other vital services on a large scale to the Sunni menu people. See: Gilmour, *Lebanon*, 29; Mandy Terc, "A Modern, Integral, and Open Understanding': Sunni Islam and Lebanese Identity in the Makassed Association," *Comparative Education Review* 50(3) (2006), 437.

While the Sunni menu people had clamoured – often violently – during the 1920s for incorporation into a *Greater Syrian* state, this became unfeasible following several *faits accomplis*: Firstly, the *Franco-Syrian Treaty of Friendship and Alliance* pledged Syria to recognising Lebanon’s sovereignty in return for its own independence¹²⁰³. Simultaneously the Pan-Arab Nationalist movement became atomised as each geographical branch waged isolated, anti-colonialist struggles within the confines of the colonially-imposed borders; often eventually relenting to inducements to recognise those borders¹²⁰⁴. Finally, as noted, the Sunni zu‘amā’ became enamoured with Lebanese sovereignty, placing them as large fish in a small pond¹²⁰⁵, and enabling them to benefit from Lebanon’s economic boom¹²⁰⁶. This facilitated the National Pact (including the zu‘amā’s formal eschewal of pan-Syrianism) alongside, at al-Suhl’s behest, recognition of Lebanese sovereignty by the newly-formed *Arab League*¹²⁰⁷. Thus ended Sunni menu people hopes for deliverance from subordination under a Maronite-dominated state: the zu‘amā’s acquiescence to Lebanese sovereignty depriving them of their former anti-establishment leadership, while the only other available leaders – the *Qabadayat* - could not organise anything beyond local agitation, nor provide for the menu people’s everyday needs, being themselves materially beholden to the zu‘amā’¹²⁰⁸. Bereft of both alternatives to the *status quo* and leaders and strategies capable of translating aspiration into reality, *status quo* realism become almost inevitable. Notably, there was no significant Sunni agitation against Lebanese sovereignty during this period, not even after the National Pact officially signalled Sunni zu‘amā’ acquiescence to the Maronite-dominated Lebanese state (and, arguably, betrayal of their constituents’ aspirations).

6.2.1.3. *Underlying environment permissive for IV:*

¹²⁰³ Traboulsi, *A History of Modern Lebanon*, 104. For a detailed overview of the Treaty, see: Karim Atassi, *Syria, the Strength of an Idea: The Constitutional Architectures of Its Political Regimes*, Trans. Christopher Sutcliff (Cambridge: Cambridge University Press, 2018), 118-122.

¹²⁰⁴ Ismael and Ismael assert that “As a result of the mandate system, the nationalist movement fragmented and each group became preoccupied with the struggle for power control within its own locality”: Tariq Ismael and Jacqueline Ismael, “The Legacy of Nationalism,” in *Politics and Government in the Middle East and North Africa*, eds, Tariq Ismael and Jacqueline Ismael (Miami: Florida International University Press, 1991), 67.

¹²⁰⁵ Attié, *Struggle*, 157; Kanaan, *Lebanon*, 221;

¹²⁰⁶ Kanaan, *Lebanon*, 132; Johnson, *Class and Client*, 118.

¹²⁰⁷ Abouttaif, *Power Sharing*, 80.

¹²⁰⁸ We will see in the following two case-studies how this would begin to change after 1958.

During this period, the Sunni men and women suffered various conditions permissive to IV:

Firstly, they suffered horizontal relative deprivation vis-à-vis their Maronite counterparts. President Chamoun (r. 1952-58) was accused of channelling development funds into Maronite-majority population centres, while neglecting Muslim-majority areas¹²⁰⁹. This economic neglect was compounded by several developments – some long term - that disrupted the traditional economic ecology of the Sunni hinterland: North Lebanon's separation from Syria disrupted traditional trade networks between Tripoli and Hama, while the 'cold war' with Israel severed Sidon's traditional links with Haifa¹²¹⁰ - fractures dealt their death knell in 1950, when President al-Khoury ended the Syrian-Lebanese economic union and imposed trade restrictions between them¹²¹¹. The resulting horizontal inequalities between the privileged Maronite community and neglected non-Maronite communities manifested in communal disparities in education¹²¹², income and living standards¹²¹³, job opportunities¹²¹⁴, etc. So keenly were these horizontal-inequalities felt that Johnson asserts that perceived socioeconomic privilege became virtually synonymous with the Maronite community, resulting in the conflation of class with confession: The Sunni men and women felt oppressed by the rich, but the rich were seen to be the Maronites, not the cross-confessional commercial elite (a perception their *zu'amā'* were keen to reify)¹²¹⁵.

Additionally, they suffered vertical relative deprivation vis-à-vis the *zu'amā'*. While Lebanon enjoyed huge economic growth throughout the

¹²⁰⁹ so much so that one Sunni deputy accused Chamoun of pursuing "a planned policy to impoverish the Muslims" (Peretz, *The Middle East*), 378). Both Schayegh and Ziadeh hold these horizontal inequalities to have been the driving factor behind the 1958 conflict, with Ziadeh describing the violence in Sunni-majority Tripoli as "revenge for all the humiliations suffered during its decline". See: Cyrus Schayegh, "1958 Reconsidered: State Formation and the Cold War in the early postcolonial Arab Middle East", *International Journal of Middle East Studies* 45 (2013), 442; and Rougier, *The Sunni Tragedy*, 3, respectively. For figures, see: Mackey, *Lebanon*, 13.

¹²¹⁰ Picard, *Lebanon*, 67.

¹²¹¹ Attié, *Struggle*, 58.

¹²¹² For example, in 1958, 59% of Sunnis were illiterate, compared to 42% of Maronites. See: N. Kliot, "The Collapse of the Lebanese State", *Middle Eastern Studies* 23(1) (Jan., 1987), 58.

¹²¹³ Kanaan, *Lebanon*, 208.

¹²¹⁴ One contemporary study found employment ratios of Christians to Muslims at 11:2 in the privileged finance sector and 16:2 in the privileged services sector. Traboulsi, *A History of Modern Lebanon*, 163.

¹²¹⁵ Johnson, *Class and Client*, 132.

1950s¹²¹⁶ (growing 7% per annum¹²¹⁷), wealth did not trickle down to the menu people, producing huge vertical wealth disparities on top of the extant horizontal ones¹²¹⁸. This was exacerbated by Chamoun's descent into the same corruption and crony capitalism that had characterised al-Khoury's regime¹²¹⁹, and his direction of economic policy in favour of the commercial classes, at the expense and neglect of the masses¹²²⁰. Adding insult to injury, inefficient taxation procedures resulted in overreliance on indirect taxation that hit the poorest the hardest, while limited direct taxation enabled commercialists to line their pockets¹²²¹.

Finally, they suffered temporal relative deprivation, vis-à-vis real/perceived former prosperity under the Ottomans¹²²². Historically, Reilly notes, Sunni-majority Tripoli and Sidon began to decline in the 1700s, long before Lebanon's creation¹²²³, but such dichotomising discourses were instrumentalised by the Sunni zu'amā'¹²²⁴ to directly link Sunni menu people deprivation to Maronite domination, thus underplaying their own complicity in widening wealth disparities by emphasising perceptions of horizontal relative deprivation.

6.2.1.4. *Marginal presence of ideologies/movements:*

¹²¹⁶ Lebanon benefited from a number of conducive regional developments during this time: The ongoing cold war with Israel saw the prominent port of Haifa demise, while Alexandria followed Haifa's fate following the 1952 *Egyptian Revolution*. Resultantly, Beirut became the main port for the Arab region (Ibid, 41). The benefits this brought were magnified by the regional oil boom, as Lebanon became the hub through which oil pipelines from Iraq and Saudi Arabia ran to markets in the West (Gilmour, *Lebanon*, 6). Meanwhile, Lebanon's relative openness, stability and freedoms – vis-à-vis the other Arab states, particularly the socialist regimes in Egypt and Syria – also made the country a mecca for both Arab and international entrepreneurs (Ibid, 6; and Attié, *Struggle*, 41).

¹²¹⁷ Gilmour, *Lebanon*, 7.

¹²¹⁸ An independent fact-finding mission carried out immediately after the 1958 crisis by French firm *Institut de Recherche et de Formation en vue du Développement* (IRFED) discovered, for example, that 87% of residents in Beirut's Sunni Ṭariq al-Jadidah and Baṣṭa districts could be classified as "poor" or "destitute" (Johnson, *Class and Client*, 31) and that an estimated 4% of Lebanon's population disposed of 32% of the country's gross national product while only 18% of the country's wealth filtered down to the bottom half of the population (Mackey, *Lebanon*, 14).

¹²¹⁹ Traboulsi, *A History of Modern Lebanon*, 134; Kamal Salibi, "Lebanon under Fuad Chehab 1958-1964", *Middle Eastern Studies* 2(3) (1996), 214.

¹²²⁰ Gilmour, *Lebanon*, 48.

¹²²¹ Kliot, "The Collapse of the Lebanese State," 71.

¹²²² One Sunni deputy during this time lamented the decline of Tripoli since the establishment of the Maronite-dominated Lebanese state, recalling it to have been "one of the richest Syrian provinces" under the Ottomans (Peretz, *The Middle East*, 378). Similarly, Sidon was remembered as a provincial capital and the prosperous traditional Port of Damascus under the Ottomans, to which Beirut was subordinated (James A. Reilly, *The Ottoman Cities of Lebanon: Historical Legacy and Identity in the Modern Middle East* (London: I.B. Tauris, 2016), 35).

¹²²³ Ibid, 36.

¹²²⁴ Frank Stoakes, "The Civil War in Lebanon", *The World Today* 32(1) (Jan., 1976), 10.

Numerous movements with small, largely intellectual support bases operated during this period. In addition to the CPL, the *Arab National Movement* [ANM], *Ba'ath Party*, and a not-yet political Islamist current (all covered in chapter 7) there also operated the above-noted secular Pan-Syrian SSNP and the ideologically-vague, largely reactive *Najjadeh* populist movement¹²²⁵. None of these movements succeeded in garnering mass Sunni menu people support while the HSC-VSC nexus held.

6.2.2. Consensus breakdown:

The 1958 *Lebanese Crisis* was set in motion in 1955 by a consensus crisis that broke the HSC and severely strained, though did not completely break, the VSC (the reasons for its survival – by way of luck and a devil's bargain - becoming clear below).

6.2.2.1. *HSC breakdown:*

In 1955, Lebanon was compelled to choose sides in the 'Arab Cold War' – a regional polarisation over Western overtures for broader Cold War alliances. This dispute produced two opposing regional camps: an Iraqi-led pro-Western bloc comprising Iraq, Turkey, Iran, and Pakistan, and an Egyptian-led 'non-aligned' bloc to which most Arab states flocked¹²²⁶. For Lebanon's Sunnis the choice was clear: The National Pact's 'Arab face' stipulation required toeing the Arab-majority line while prohibiting alliances with Western states, while their general anti-colonial animus bristled against Western political manoeuvrings suspected to be trojan horses for colonial revanchism¹²²⁷. For the Maronites, however, the National Pact's 'Arab Face' stipulation imposed looser constraints on foreign policy; interpreted as a symbolic concession to Sunni sentiment¹²²⁸. Meanwhile, siding with the non-aligned bloc, under President Nasser's leadership, smacked to the Maronites of a trojan horse for Pan-Arab expansionism (and, by implication,

¹²²⁵ While the Najjadeh did have significant non-intellectual cadres during this period, its ideological vagueness and frequent if even collaboration with the Sunni zu'amā' should discourage us from considering it an movement in the same vein as the other factions discussed in this study (it was essentially a populist paramilitary/youth movement formed specifically to oppose the Maronite-national *Kataeb* party – see below – its platform one of vague, anti-Maronite Sunni chauvinism with no discernible program beyond belligerence. See: Gilmour, *Lebanon*, 66; Traboulsi, *A History of Modern Lebanon*, 103; Khalaf and Denoeux, "Urban Networks," 186.

¹²²⁶ Attié, *Struggle*, 83.

¹²²⁷ Such sentiments were clear in Sunni rhetoric over perceived transgressions of the HSC – see below.

¹²²⁸ As noted in Chapter 5.

the end of Lebanese sovereignty and return to Sunni-domination)¹²²⁹. This was unacceptable to a community who had spent decades ensuring their primacy within a Maronite-dominated, sovereign, and independent Lebanese state, and who still held traumatic memories of 1,300 years of Sunni domination.

Initially, Chamoun appears to have been sensitive to the HSC threat posed by the Arab Cold War. When Britain invited Lebanon to join the 1955 *Baghdad Pact*, Chamoun tread a middle ground by refusing to join or condemn the Pact, while ingratiating himself with both camps¹²³⁰. This was intended to alleviate the anxieties of his own Maronite constituency while upholding the National Pact. Unfortunately, the political atmosphere over the Baghdad Pact was so polarised that refusal to condemn it was almost tantamount to endorsement¹²³¹. Nasser denounced the Pact as a British attempt at imperialism by other means¹²³², and Lebanese Sunnis violently demonstrated against Chamoun's refusal to condemn the Pact accordingly¹²³³. Insult was added to perceived injury when Chamoun also refused to join the *Arab Defence Pact*, signed by Egypt, Saudi Arabia, and Syria, in response to the Baghdad Pact¹²³⁴. In 1956, Chamoun committed a second sin of omission by refusing to sever diplomatic relations with France and Britain following the *Suez Crisis*. Though Chamoun attempted to intercede with the two powers on Nasser's behalf during the crisis and had called an Arab summit to coordinate support for Egypt, Chamoun's refusal to choose sides won him only condemnation¹²³⁵. Nasser accused him of betrayal¹²³⁶, and Egyptian and Syrian propagandists commenced a campaign against him that continued until the *Lebanese Crisis's* conclusion¹²³⁷. Lebanese Sunnis – with zu'amā' lip service – again followed Nasser's lead and accused Chamoun of betraying Lebanon's 'Arab Face'; his refusal to sever relations with France and Britain allegedly breaching Lebanon's commitment to Arab solidarity. Once again, violent Sunni demonstrations ensued¹²³⁸.

¹²²⁹ Salibi, *A House of Many Mansions*, 50; Hirst, *Beware of Small States*, 70; Attié, *Struggle*, 101.

¹²³⁰ Attié, *Struggle*, 98.

¹²³¹ Ibid.

¹²³² Ibid, 75.

¹²³³ Juan Romero, "Discourse and Mediation in the Lebanese Crisis of 1958," *Middle Eastern Studies* 48 (4) (2012), 568.

¹²³⁴ Traboulsi, *A History of Modern Lebanon*, 132.

¹²³⁵ Attié, *Struggle*, 104.

¹²³⁶ Ibid, 104.

¹²³⁷ Khalaf, *Civil and Uncivil*, 114.

¹²³⁸ Ibid, 114.

From 1957, suffering withering Egyptian and Syrian propaganda and frequent Sunni protests, Chamoun's policy choices became more divisive. In March 1957, Lebanon became the sole Arab state to endorse the *Eisenhower Doctrine*¹²³⁹; a US initiative pledging military support to states threatened by "International Communism" (but broadly perceived across the Arab world as more concerned with curtailing Nasser)¹²⁴⁰. This was considered yet another betrayal of Arab solidarity and, moreover, contravened the National Pact's stipulation against forming alliances with Western powers. Both Egyptian and Syrian propaganda and the Sunni *zu'amā'* condemned Chamoun's endorsement of a doctrine they considered "the heir of past colonialist projects"¹²⁴¹, Sunni demonstrators returned to the streets¹²⁴², and Sunni and other anti-Chamoun Parliamentary deputies resigned *en masse*¹²⁴³. Finally, in February 1958, Chamoun committed his final sin against the Arab Cold War *cause de jour* by conspicuously delaying his recognition of the newly formed (and Sunni celebrated) UAR to coincide with his recognition of the reactionary, Iraqi-Jordanian *Arab Union*; a move perceived as a deliberate manoeuvre to deny Nasser the right to present himself as undisputed leader of the Arab world¹²⁴⁴; and an endorsement of the pro-Western Iraqi and Jordanian Monarchies.

His attempts at balancing confessional sentiments seemingly futile, Chamoun acted to cement his power and ability to dictate foreign policy. In 1957, he introduced an electoral law reform ahead of scheduled parliamentary elections. His motives, opponents claimed, was to stack parliament in his favour to enable him to assert his pro-Western, anti-Nasser foreign policy¹²⁴⁵. The election results appeared to vindicate this, as almost all major Sunni *zu'amā'* lost their seats in favour of lesser-known candidates politically beholden to Chamoun¹²⁴⁶.

¹²³⁹ Attié, *Struggle*, 112.

¹²⁴⁰ Rogan, *The Arabs*, 391.

¹²⁴¹ Maurice M. Labelle Jr., "A New Age of Empire? Arab 'Anti-Americanism', US Intervention, and the Lebanese Civil War of 1958," *The International History Review* 35(1) (2013), 48. Similarly it was considered "the [US] replacement of the British and French aggression" (Sorby, "Lebanon," 84).

¹²⁴² Attié, *Struggle*, 129.

¹²⁴³ Khalaf, *Civil and Uncivil*, 108.

¹²⁴⁴ Nasser Kalawoun, *The Struggle for Lebanon: A Modern History of Lebanese-Egyptian Relations* (London: I.B. Tauris Publishers, 2000), 48.

¹²⁴⁵ Khalaf, *Civil and Uncivil*, 108.

¹²⁴⁶ *Ibid*, 109.

Moreover, Chamoun appointed as PMs lesser Sunni zu‘amā’ who lacked the political leverage to check his prerogatives¹²⁴⁷. This negated the modus vivendi built upon the strong, balanced partnership of President al-Khoury and PM al-Suhl, reigniting the security dilemma as Sunni political representation was revealed to exist solely at the pleasure of the Maronite establishment. Worse still, when confronted by Chamoun’s transgressions – both against the *cause de jour* and against the Sunni elites themselves – the Sunni zu‘amā’ found they had no other recourse than to resign in protest¹²⁴⁸. Lebanon’s power-sharing compromise was thus revealed to be a chimera, with Sunni influence existing only as far as it happened to agree with the Maronite President.

6.2.2.2. VSC breakdown:

The apparent impotence of the Sunni zu‘amā’ – so easily disempowered by the Maronite President’s gerrymandering, and so incapable of reversing it – strained the VSC, as the zu‘amā’ defaulted on their duty to represent the interests/sentiments of their constituents. To the menu people, it now appeared that they stood completely at the mercy of the Maronite establishment. Accordingly, they turned to extra-constitutional means for protection and began stockpiling arms¹²⁴⁹.

Worse still, the mass ejection of leading Sunni zu‘amā’ from political office deprived them of the largesse needed to sustain their patronage networks (vital to the VSC). Under such circumstances, the destitution of many Sunni neighbourhoods – coupled with the lack of state social security provisions – would quickly be keenly felt if decisive action were not taken.

This continued eroding and humiliation of Sunni political power catalysed a broader ‘arms race’ between a Sunni community that increasingly saw violence as its only means of protection and influence, and a Maronite community rendered increasingly paranoid of Sunni subversion/revanchism by Sunni mass

¹²⁴⁷ As we will see below, he cycled through several PMs during this period due to resignations. See: Traboulsi, *A History of Modern Lebanon*, 130.

¹²⁴⁸ Both Chamoun’s refusal to sever diplomatic ties with France and Britain during the 1956 *Suez Crisis*, and his acceptance of the *Eisenhower Doctrine* the following year, prompted waves of resignations from Sunni PMs, Ministers and MPs who found themselves powerless to challenge his decision-making. See: Attié, *Struggle*, 105 and 129; Khalaf, *Civil and Uncivil*, 108; Sorby, “Lebanon,” 81; Traboulsi, *A History of Modern Lebanon*, 132; and El-Solh, *Lebanon and Arabism*, 315.

¹²⁴⁹ Khalaf, *Civil and Uncivil*, 111.

protests and inflammatory Syrian and Egyptian propaganda. As Chamoun became increasingly vilified by these external provocateurs, and faced mounting Sunni unrest internally, the Maronite community coalesced in solidarity around him¹²⁵⁰. Meanwhile, as the Lebanese security services began intercepting Syrian arms shipments destined for the Sunni community¹²⁵¹, the Maronite *Kataeb* paramilitary movement began expanding their own military activity and presence in anticipation of an existential showdown¹²⁵².

6.2.3. Ideological competition:

As Maronite transgressions and Sunni zu‘amā’ impotence were *pushing* the Sunni menu people towards revolt, the ascendancy of a rejuvenated Pan-Arab Nationalist ideology - under Nasser’s tutelage – was *pulling* them. Not only did Nasser offer leadership to a community whose own leadership had lost much of its credibility, but the very phenomenon of Nasserite Pan-Arab Nationalism enflamed the degree to which Lebanese Sunnis experienced their own crisis by raising the bar of expectations against which they evaluated their circumstances. Moreover, just as Chamoun *pushed* Lebanon’s Sunnis towards Nasser, Nasser simultaneously took efforts to *pull* them under his wing – both directly (by addressing the Sunni menu people directly as “fellow countrymen”¹²⁵³ and ambiguously encouraging their incorporation into the UAR¹²⁵⁴) and indirectly (by example of his accomplishments in Egypt¹²⁵⁵). While Nasser could not

¹²⁵⁰ According to Mackey, Chamoun became during this time “an object of virtual idolatry among the Maronite masses because of his staunch defence of the Christian Lebanon ideal. During the crisis of 1958, Maronite villages were papered with pictures showing Christ pointing an approving finger towards the image of Chamoun framed with a heart on the saviour’s bosom. Not even Chamoun’s forced withdrawal from the presidency in 1958 failed to dampen the aura. In 1963, the visit of Chamoun was still plastered across the mountain, often depicted next to the Madonna, her arm draped protectively over his shoulder.” See: Mackey, *Lebanon*, 49.

¹²⁵¹ Khalaf details such cases, beginning as early as 1956, in detail - Khalaf, *Civil and Uncivil*, 111).

¹²⁵² Frank Stoakes, “The Supervigilantes: The Lebanese Kataeb Party as a Builder, Surrogate and Defender of the State,” *Middle Eastern Studies* 11(3) (Oct., 1975), 227.

¹²⁵³ Kanaan, *Lebanon*, 227.

¹²⁵⁴ *Ibid*; Attié, *Struggle*, 156.

¹²⁵⁵ In his own country, he had stunned the world by deposing of the British-backed Egyptian Monarchy and establishing in its place the socialistic state. Simultaneously, he established himself as a strong and assertive paladin of Arab anti-colonialism and non-alignment, shunning British and US overtures to recruit him into the anti-Soviet Camp; effecting an agreement for the withdrawal of all remaining British troops in Egypt (present there since 1881); circumventing British and US attempts to economically coerce his compliance (by withdrawing funding for the Aswan Dam project) by nationalising the lucrative Suez Canal; and snatching political victory from military defeat in the 1956 Suez Crisis. Then, crucially, his unification of Egypt and Syria under the UAR in February 1958 demonstrated his willingness and ability to export these positive changes beyond Egypt’s borders, and begin the dismantling of the hated, colonialist-imposed,

immediately fill the threatened vacuum resulting from the weakening of Sunni zu‘amā’ patronage networks, his socialistic reforms in Egypt promised to make such networks redundant should Lebanon join his UAR, an eventuality which Nasser strongly hinted towards¹²⁵⁶.

More generally, Nasser offered the Sunni-Lebanese menu people several ideological tools in their moment of crisis:

- 1) A diagnostic framing attributing the Sunni menu people’s woes to a Maronite-embraced, imperialist-imposed state order¹²⁵⁷ (a diagnosis that the Sunni zu‘amā’ were happy to perpetuate to disguise vertical inequalities)¹²⁵⁸.
- 2) A compelling prognostic framing offering easy and straightforward solutions to such problems (i.e., the erasing of colonially-inspired borders and unification of a strong, anti-imperialist Arab world)¹²⁵⁹, coupled with a realisable advanced prognosis (Lebanon’s joining of the UAR).
- 3) An empowering strategic framing – Nasser having proven himself personally capable of affecting the change his supporters sought; both in his revolutionary exploits in Egypt¹²⁶⁰ and establishment of the UAR. By backing Nasser, inviting him to forcefully annex Lebanon into the UAR, and demonstrating their own determination to aid in and legitimise that annexation (through violent revolt), Lebanon’s Sunni menu people could finally perceive a realistic alternative to Lebanon and its volatile, dysfunctional HSC-VSC nexus.
- 4) Highly-prototypical leadership (discussed in Chapter 7).
- 5) An opportunity to burnish Sunni-Lebanese group ‘pride’ and ‘respect’, offering them both the dignity of winning their deliverance and the chance to exchange their low ‘pride’ and ‘respect’ status as a

artificial Arab state system that had placed Lebanon’s Sunnis under Maronite domination and socioeconomic deprivation. See: Attié, *Struggle*, 75; George Lenczowski, “The Objects and Methods of Nasserism,” *Journal of International Affairs* 19(1) (1965), 64; Michael C. Shupe *et al*, “Nationalization of the Suez Canal: A hypergame analysis,” *Journal of Conflict Resolution* 24(3) (Sep. 1980), 481; Labelle Jr., “A New Age of Empire?” 46.

¹²⁵⁶ Kanaan, *Lebanon*, 227; Attié, *Struggle*, 156.

¹²⁵⁷ See Appendix B.

¹²⁵⁸ Ibid.

¹²⁵⁹ Ibid.

¹²⁶⁰ See footnote 1383 above.

secondary confessional community in Lebanon for one as a dominant community in a strong global Pan-Arab power.

Thus, Nasser provided the Sunni menu people with a vision transcending their usual demands for change within the framework of the establishment ideology, offering instead systemic change that would circumvent it – its flaws, compromises, and tensions – entirely. Absent VSC breakdown, however, it is questionable how influential Pan-Arab Nationalism would have been among Lebanon’s Sunni menu people. While Nasserite pan-Arab Nationalism and the UAR certainly held an emotional draw for the Sunni-Lebanese menu people, it is likely that, had the Sunni zu‘amā’ remained credible, they would have been able to continue walking their fine line between rhetorical Pan-Arab sentiment and pragmatic Lebanese sovereignty, portraying themselves as capable local viceroys of Pan-Arabism within a sovereign but ‘Arab facing’ Lebanon. They would have retained their monopoly on Sunni loyalty, information, and political narratives, and would have used that to channel the Nasserist impulse towards their own interests. Certainly, the Sunni zu‘amā’ did not share their constituents’ desire to entire into the UAR, their being both accustomed to the financial benefits of an independent Lebanon and their place as big fish within its small pond; and fearing the kind of socialising reforms seen in Egypt, which would both compromise their financial interests and annul their clientelist leverage over their constituents¹²⁶¹. In the event, the zu‘amā’s interests were so threatened by Chamoun’s campaign of disempowerment that they found themselves compelled to reluctantly pay lip-service to Nasser and the UAR, if only to use him as a bogeyman with which to leverage within-establishment concessions from Chamoun¹²⁶² and avoid completely losing the respect and fealty of their constituents. Thus, when war broke out in May 1958, the Sunni zu‘amā’ assumed leadership of the anti-establishment movement and paid ambiguous lip-service to the Pan-Arab Nationalist demands of their constituents in order to salvage what remained of the VSC, while attempting to force a compromise resolution to the conflict which would restore the old HSC-VSC nexus instead of allowing Nasserism to abolish it. This decision to lead the Nasserite movement prevented the VSC from completely collapsing by placing the zu‘amā’ as vital intermediaries

¹²⁶¹ Attié, *Struggle*, 102, 157, 230; Kanaan, *Lebanon*, 17, 221.

¹²⁶² Petran, *Struggle over Lebanon*, 52; Sorby, “Lebanon,” 106; and Peretz, *The Middle East*, 362.

between the menu people and the *de facto* 'head za'īm', Nasser (thus reclaiming their duty as capable communal leaders and filling a vacuum other movement cadres might otherwise have exploited¹²⁶³). However, it would be luck/exogenous forces that rescued the VSC from being abolished altogether by a Pan-Arab Nationalist movement triumph – see below.

As the Sunni menu people clamoured for incorporation into the UAR, the Maronite community further escalated their own arms race, determined to defend independent, Maronite-dominated Lebanon from what they considered a trojan horse for Sunni revanchism¹²⁶⁴. Under such heightened communal tensions, open conflict was only a spark away:

6.2.4. *Escalation into violence:*

Two developments sparked the outbreak of hostilities:

The first was the results and aftermath of the June 1957 parliamentary elections. As noted, almost every traditional Sunni za'īm was unseated by lesser zu'amā' beholden to Chamoun, prompting accusations of fraud and CIA-funded vote buying by Chamoun¹²⁶⁵. Attié asserts that the election results "crystallised the opposition to Chamoun and marked a point of no return for the leading members of the opposition"¹²⁶⁶. This was exacerbated by Chamoun's refusal to deny rumours that – with parliament stacked in his favour – he intended to amend the constitution to allow him a second term in office¹²⁶⁷. This threatened both the Sunni zu'amā' (who faced another six years of marginalisation), and the menu people (who faced another six years of transgressions against the *cause de jour* and potential destitution due to the disenfranchisement of their representatives and consequent gutting of their patronage networks)¹²⁶⁸.

Worse still, the following September the state indicted four-hundred individuals (including leading Sunni zu'amā') on charges of inciting confessional violence and attempting a coup in pre-election protests the previous May¹²⁶⁹. With

¹²⁶³ This is discussed further in Chapter 7 and detailed in Appendix B.

¹²⁶⁴ Kanaan, *Lebanon*, 244, 257-260; Charles Winslow, *Lebanon: War & politics in a fragmented society* (London and New York: Routledge, 1996), 111; Khalaf, *Civil and uncivil*, 115.

¹²⁶⁵ Rogan, *The Arabs*, 392.

¹²⁶⁶ Attié, *Struggle*, 121.

¹²⁶⁷ *Ibid*, 161.

¹²⁶⁸ Romero, "Discourse and Mediation," 568.

¹²⁶⁹ Khalaf, *Civil and Uncivil*, 111.

leading Sunni political representatives now not only disempowered but actively hunted by the state, war became almost inevitable. Panicked by developments, Chamoun resorted to repression and censorship¹²⁷⁰, while the Kataeb increasingly asserted itself militarily. All the while, Nasser's establishment of the UAR broke *status quo* realism and gave the Sunni menu people a concrete end to aspire towards (Lebanon's integration into the UAR). When, on 8th May, a known anti-Chamoun journalist – Nasib al-Matni – was murdered, the Sunni zu'ama' immediately accused Chamoun of complicity, and called a general strike to demand his resignation¹²⁷¹. The strikes quickly turned violent¹²⁷². Nasser exhorted the Sunni menu people to depose the President¹²⁷³. The war had begun.

6.2.5. 'Conflict resolution' and restoration of *status quo* interbellum:

The rebels quickly gained the upper hand, with most non-Maronite population centres immediately falling under their control¹²⁷⁴. Early battlefield successes, numerical superiority and, allegedly, substantial UAR support in weaponry¹²⁷⁵, money¹²⁷⁶ and even fighters¹²⁷⁷, encouraged intransigence among the front's commanders throughout the first half of the conflict. As noted, unlike the latter two IV episodes, the Sunni zu'ama' assumed leadership and were indispensable in facilitating, shaping (and then reigning in) the IV. They scorned any peace initiatives that fell short of Chamoun's immediate resignation in favour of a consensus candidate successor¹²⁷⁸ (while the Sunni menu people still gunned for incorporation into the UAR). Chamoun was equally intransigent, however, and seems to have hoped to invoke external intervention to buttress his regime, appealing in turn to the Arab League, the UN, Britain, France, and the US. Each of these external actors were non-committal¹²⁷⁹ however.

¹²⁷⁰ Ibid. 112-113.

¹²⁷¹ Attié, *Struggle*, 115.

¹²⁷² Ibid, 173.

¹²⁷³ Kalawoun, *The Struggle*, 50; Sorby, "Lebanon," 99; Attié, *Struggle*, 103.

¹²⁷⁴ Within two weeks, the rebels were in possession of two thirds of Lebanon's territory: Attié, *Struggle*, 115.

¹²⁷⁵ Traboulsi, *A History of Modern Lebanon*, 136.

¹²⁷⁶ The UAR spent an estimated 70 million Syrian pounds on the rebel war effort in June alone: Attié, *Struggle*, 186.

¹²⁷⁷ A UN observation team estimated that approx. 25% of the rebel fighters were actually undercover soldiers from the UAR: Ibid, 190.

¹²⁷⁸ Ibid, 176.

¹²⁷⁹ The UN agreed only to set up a UN observer mission to monitor UAR interference (Attié, *Struggle*, 127.); Britain, France and the US all considered it diplomatically too risky to intervene personally without a UN mandate (Labelle Jr., "A New Age of Empire?" 50).

Nevertheless, external intervention did eventually force a ceasefire. Nasser appears to have re-evaluated the wisdom of incorporating so volatile and divided a state into the UAR and, fearing US intervention, negotiated pragmatically¹²⁸⁰; halting material support to the rebel front¹²⁸¹, assuring the US he held no ambitions to annex Lebanon, and pledging to use his influence to help resolve the conflict¹²⁸². By mid-July, with ammunition low, the rebel leaders also became pragmatic, agreeing to elections that would see Chamoun complete his term, as scheduled, in September, in return for the election of a consensus candidate, LAF commander Fu'ad Shihab, whose active neutrality made him one of few available consensus candidates¹²⁸³. Attié argues that the conflict was essentially resolved by this stage¹²⁸⁴. However, on 14th July, the rebel war effort – at least for the moment – was rejuvenated by a pro-Nasser revolution in Iraq, which overthrew the pro-British Monarchy; leading to a further escalation in fighting as it appeared the entire *Fertile Crescent* might fold into the UAR¹²⁸⁵. The revolution panicked the Western powers however, and British and US troops deployed to Jordan and Lebanon, respectively, to buttress the remaining pro-Western regimes¹²⁸⁶. Despite initial resistance from the Sunni *zu'amā'*, who decried the intervention as an imperialist invasion¹²⁸⁷, they were quickly pacified by the threat of bombardment by the US fleet¹²⁸⁸.

On 31st July, Shihab was elected with a clear majority¹²⁸⁹. He appointed as PM popular rebel leader and prominent Sunni *za'im* Rashid Karami, who assembled a divisive cabinet excluding pro-Chamoun ministers. The Kataeb, whose militiamen formed the bulk of the loyalist forces' foot soldiers, protested that Shihab was rewarding the rebels, and initiated a three week "counter rebellion"¹²⁹⁰. The guns finally fell silent when Karami presented a new "Salvation Cabinet" equally representing Muslims and Christians, rebels and loyalists¹²⁹¹.

¹²⁸⁰ Ibid, 213.

¹²⁸¹ Ibid, 190.

¹²⁸² Ibid, 213.

¹²⁸³ Shihab adopted a policy of 'active neutrality' for the LAF, protecting life and property as much as possible, preventing any side from effecting a decisive military victory to facilitate negotiations (Ibid, 194).

¹²⁸⁴ Ibid, 229.

¹²⁸⁵ Rogan, *The Arabs*, 397.

¹²⁸⁶ Traboulsi, *A History of Modern Lebanon*, 137.

¹²⁸⁷ Khalaf, *Civil and Uncivil*, 118.

¹²⁸⁸ Traboulsi, *A History of Modern Lebanon*, 138.

¹²⁸⁹ Ibid, 138.

¹²⁹⁰ Attié, *Struggle*, 224.

¹²⁹¹ Sorby, "Lebanon," 109.

Chamoun stepped down at the end of his term, as agreed, on 23rd September and, by the end of October, US troops withdrew¹²⁹². Peace was restored under the slogan of “No Victor, no Vanquished”¹²⁹³, while making only the minutest amendments to the now clearly volatile HSC-VSC nexus¹²⁹⁴. As the next episode details, it would not last.

6.3. The 1975-6 *Two-Year War*:

The *Two-Year War* refers to twenty months of countrywide violence occurring between March 1975-November 1976. It was fought over two main issues, the first being disagreement (largely between Lebanon’s dominant Maronite community and everyone else) over the rights of the *Palestinian Resistance Movement* [PRM] to operate from Lebanese soil, and the second being a campaign, led by a Marxist-leaning alliance (the *Lebanese National Movement* [LNM]) to impose secularising reforms intended to uproot the country’s entrenched confessional feudal and capitalist interests. While on the surface the immediate objectives, rhetoric, and leadership of the warring factions differed from that of the 1958 *Lebanese Crisis*, it in fact constituted another cycle in the restoration and breakdown of the HSC-VSC nexus, and the attendant enflaming of the essentially Sunni-Maronite security dilemma. Much as in 1958, the main Sunni population centres of Tripoli, West Beirut, and Sidon became the main epicentres of violence. Moreover, the conflict soon showed its confessional colours, manifesting in confessionally-motivated massacres and displacement operations by both sides. By the time a shaky ceasefire was imposed – once again at gun point – by Syrian ‘peacekeeping’ troops, an estimated 50,000 Lebanese had died, at least 100,000 wounded, and a further 600,000 internally displaced¹²⁹⁵. Moreover, the following peace would prove hollow and fleeting and, by the following year, would reignite into a conflagration that would last until 1990, draw in multiple foreign interventions, and inflict some 150,000 fatalities, 200,000

¹²⁹² Traboulsi, *A History of Modern Lebanon*, 138.

¹²⁹³ Ibid, 138.

¹²⁹⁴ See below.

¹²⁹⁵ Gilmour, *Lebanon*, 142.

casualties¹²⁹⁶, and displace almost one third of the population¹²⁹⁷ (out of a population of 3.5 million¹²⁹⁸).

6.3.1. Status quo interbellum:

The modus vivendi was restored following the 1958 *Lebanese Crisis* largely due to President Shihab's pragmatism. Shihab seems to have keenly understood the security dilemma and HSC-VSC nexus, and took concrete steps to restore and solidify them:

6.3.1.1. *Lowest-common-denominator modus vivendi:*

The post-1958 order reset the National Pact and the HSC-VSC nexus it embodied, both sides backing down from their transgressions, the anti-establishment movement relinquishing its extra-establishment demands, and all resolving to restore the communal balance. Once again, relative peace and stability was maintained by balancing several horizontal equilibriums:

Firstly, Shihab, like al-Khoury, balanced Sunni and Maronite sentiments by servicing Lebanon's 'Arab face' obligations of pan-Arab solidarity within a strict framework of Lebanese sovereignty. He maintained cordial relations with Nasser, enshrined in a 1959 joint communique in which both Presidents underlined their commitment to cooperation. Notably, Shihab pledged that Lebanon would not allow its territory to be used against the UAR while, in return, Nasser pledged to deal with Lebanon only through official channels¹²⁹⁹. These efforts were aided by stabilisation of the Arab Cold War, meaning Lebanon no longer had to choose sides and risk upsetting the communal equilibrium¹³⁰⁰.

Additionally, Shihab resurrected the old working relationship between al-Khoury and al-Suhl by maintaining as PM¹³⁰¹ Sunni za'im Rashid Karami¹³⁰². Contrasting Chamoun's appointing of lower-ranking Sunni zu'amā' as PMs, Karami was Lebanon's second most powerful Sunni za'im (after Beirut's Saeb Salam). He virtually monopolised Sunni men's loyalty in Tripoli¹³⁰³,

¹²⁹⁶ Micheal Clodfelter, *Warfare and Armed Conflicts: A Statistical Encyclopedia of Casualty and other figures, 1492-2015* (Jefferson, NC: McFarland & Company, Inc., Publishers, 2017), 585.

¹²⁹⁷ Janie Hampton, *Internally Displaced People: A Global Survey*, 2nd ed, (New York: Taylor & Francis, 2002), 182.

¹²⁹⁸ Khalaf, *Civil and Uncivil*, 232.

¹²⁹⁹ el-Solh, *Lebanon and Arabism*, 319; and Salibi, "Lebanon under Fuad Chehab," 224.

¹³⁰⁰ See below.

¹³⁰¹ For all but two years of his presidential tenure.

¹³⁰² Petran, *The Struggle over Lebanon*, 55.

¹³⁰³ For an overview of Rashid Karami, his power-base and credentials, see: Mackey, *Lebanon*, 73-74.

granting him electoral and extra-constitutional leverage comparable to that of al-Suhl during the 1940s, and was the Sunni za‘īm most representative of the Sunni menu people’s pro-Nasser sympathies¹³⁰⁴.

Further, Shihab tweaked the HSC by enhancing the powers of the PM¹³⁰⁵ and amending quotas on state appointments to 5:5 Muslims to Christians (from the prior of 5:6), although Parliament retained its 5:6 Muslims to Christians balance¹³⁰⁶. These tweaks facilitated the restoration and sustaining of the Sunni VSC by increasing and upgrading Sunni political representation and, by extension, the Sunni zu‘amā’s access to distributable largesse (while evading any need for those elites to test those powers against the Maronite Presidency).

Finally, the HSC and VSC were strengthened by Shihab’s concerted, highly-visible development campaign to bring the neglected Muslim hinterlands up to standard with the Maronite heartlands¹³⁰⁷. This lessened both horizontal resentments and the Sunni menu people’s material dependence on their zu‘amā’, a development which – though challenging the zu‘amā’s influence over their constituents – did ease the scrutiny they faced from those constituents. Notably, these programmes and reforms were implemented by a largely technocratic government with only grudging zu‘amā’ support.

6.3.1.2. *Status quo realism:*

As in the 1930s, prospects for Pan-Arab political unity (and, with it, Nasser’s methodology for achieving sweeping socio-political and socioeconomic change) were blunted in the 1960s. The *Lebanese Crisis*’ resolution ended Sunni aspirations for Lebanon’s integration into the UAR; by Nasser’s hand no less¹³⁰⁸.

¹³⁰⁴ While the more powerful Salam had led the revolt in Beirut, and paid lip service to Nasser, his vacillating rhetoric between Nasserism and Lebanese sovereignty during the 1958 conflict had called into question his sincerity (Ibid). Karami, in contrast, had been far more stalwart in his Nasserist rhetoric, and retained strong relations with Nasser throughout Shihab’s administration (Petran, *The Struggle over Lebanon*, 55); in contrast to Salam who, alarmed by Nasser’s socialist reforms in the UAR, began increasingly to consort with the anti-Nasserist Maronite commercial elite, including Chamoun (see below) (Traboulsi, *A History of Modern Lebanon*, 143).

¹³⁰⁵ Petran, *The Struggle over Lebanon*, 141.

¹³⁰⁶ Ibid, 57.

¹³⁰⁷ This included the construction of roads and water and electrical infrastructure, in addition to the opening of rural schools, pharmacies and hospitals (Traboulsi, *A History of Modern Lebanon*, 142). Shihab also developed the Lebanese University; Lebanon’s only public, free university (Ibid). These policies demonstrated some signs of narrowing wealth disparities in the country, with a 1970 study finding a 32% increase in Quality-of-Life Index across the country since 1960; with percentages particularly high in the poor Sunni North and Shi’ite South (Hanf, *Coexistence*, 102). Meanwhile, Muslim illiteracy fell (Ibid, 69) and university enrolment rose to equal that of the Christian communities (Ibid, 96).

¹³⁰⁸ Attié, *Struggle*, 202.

Moreover, Arab political unity betrayed itself to be a chimera. Iraq declined to join the UAR following its 1958 revolution¹³⁰⁹ and, in 1961, Syria seceded¹³¹⁰. This prompted Nasser's rhetoric to shift from Arab political unity to vague unity of purpose between independent Arab states¹³¹¹. For the Sunni menu people, then, their champions – Nasser, Syrian and Iraqi revolutionaries, and their own zu 'amā' - had agreed to acquiesce to the *status quo*, leaving them with no option but to follow suit.

6.3.1.3. *Underlying environment permissive for IV:*

While Shihab made some strides towards narrowing wealth disparities, conditions deteriorated quickly under his successors (President Charles Helou, r. 1964-1970; and Suleiman Frangieh, r. 1970-1976). Helou, despite token efforts to continue Shihab's policies¹³¹², reoriented economic policy back in favour of the financial/commercial elite¹³¹³; as had been customary under al-Khoury and Chamoun. *Laissez faire* capitalism returned, with commercial monopolies – most notably (and gratingly), the Chamoun-affiliated *Consortium* – encroaching on all sectors of economic life; particularly industry, agriculture, and fishing¹³¹⁴. Irresponsible, unscrupulous, exploitative, and unregulated practices devastated the menu people's traditional livelihoods – especially agriculture¹³¹⁵ – driving mass urbanisation and slum growth¹³¹⁶. Speculation, hoarding of resources, and control over imports and exports meanwhile enriched commercialists while doubling living costs (between 1967 and 1975) for the masses¹³¹⁷. Furthermore,

¹³⁰⁹ Roby C. Barrett, *The Greater Middle East and the Cold War: US Foreign Policy Under Eisenhower and Kennedy* (London: I.B. Tauris, 2007), 73.

¹³¹⁰ John McHugo, *Syria: A Recent History* (London: Saqi Books, 2014), 143.

¹³¹¹ Goldschmidt Jr., *A Concise History*, 309.

¹³¹² For example, in 1965 he secured parliamentary approval for an expensive development plan aimed at providing social housing, clinics, laboratories, technical schools, and a university campus for the Lebanese University. See: Traboulsi, *A History of Modern Lebanon*, 146.

¹³¹³ *Ibid*, 146.

¹³¹⁴ Traboulsi and Khalaf both provided detailed overviews of the monopoly issue; see: Traboulsi, *A History of Modern Lebanon*, 158-159; and Khalaf, *Civil and Uncivil*, 163-164.

¹³¹⁵ The main issue was the buying up of land by monopolies for high-yield crops bound for overseas export. This raised the cost of living and destroyed the tradition share-cropping system of agriculture. Many landlords deliberately tried to drive tenants to the cities to enable them to sell or rent off their lands to developers. Between 1959 and 1970, the perception of the population employed on agriculture fell from 50% to 20%. See Petran for a detailed over: Petran, *The Struggle over Lebanon*, 61 and 135. See also: Traboulsi, *A History of Modern Lebanon*, 166; and Khalaf, *Civil and Uncivil*, 165.

¹³¹⁶ By the outbreak of the two-year war, approximately 400,000 of Beirut's one million residents were recent migrants living in shanty towns that became known as the "Belts of Misery". Traboulsi, *A History of Modern Lebanon*, 162.

¹³¹⁷ *Ibid*, 161.

Lebanon's inefficient, regressive taxation system persisted¹³¹⁸. The 1970 election of President Frangieh saw Shihab's development policies stagnate for good¹³¹⁹, while the vices of al-Khouryism-Chamounism - nepotism, corruption, and exploitation - returned with a vengeance¹³²⁰. These injustices were extra inflammatory because they came off the back of tangible improvements in the menu people's circumstances, recalling *J-Curve Theory* whereby "Revolutions are most likely to occur when a prolonged period of objective economic and social development is followed by a short period of sharp reversal"¹³²¹. That social agitation not only returned to pre-1958 levels but significantly superseded it (see below) is testament to this.

Wealth disparities also retained their horizontal, confessional dimension. A 1973 study found that, despite some progress by Shihab's reforms, confessional inequalities remained pervasive: large businesses remaining predominantly in Maronite hands¹³²², non-Maronites continuing to constitute most of the working class¹³²³. Unlike previously however, Sunni zu'amā' were less successful in deflecting class tensions into confessional tensions, and they increasingly faced criticism for putting their own capitalist interests before the basic needs of their constituents¹³²⁴ (with significant consequences for the conflict to come).

6.3.1.4. *Marginal presence of ideologies/movements:*

By the *status quo* interbellum preceding the *Two-Year War*, numerous movements had found a footing in Lebanon. The pre-established CPL, SSNP, and *Ba'ath Party* (splintering into the pro-Syrian *Ba'ath Party* and pro-Iraqi *Arab Socialist Ba'ath Party* [ASBP] in 1966) refashioned their ideological platforms towards more populist ends¹³²⁵, while the Islamist current became increasingly political with the establishment of the *Muslim Brotherhood-leaning Islamic Association* [IA]¹³²⁶. Meanwhile, the period following the combined Arab defeat in

¹³¹⁸ Ibid, 161.

¹³¹⁹ Hanf, *Coexistence*, 125.

¹³²⁰ Ibid, 126.

¹³²¹ James C. Davies, "Toward a Theory of Revolution," *American Sociological Review* 27(1) (Feb. 1962), 5.

¹³²² In 1973, Muslims comprised a mere 24.5% of Lebanese in commercial firms, 32.4% in industrial firms, and 29% in banking: See: Traboulsi, *A History of Modern Lebanon*, 163.

¹³²³ In 1973, Muslims constituted 75% of industrial workers. Ibid, 163.

¹³²⁴ Khalaf and Denooux, "Urban Networks," 187.

¹³²⁵ See below and chapter 7.

¹³²⁶ See chapter 7.

the 1967 *Arab-Israeli War* saw the ANM splinter into multiple Marxist-leaning movements¹³²⁷. Again, however, none garnered popular legitimacy prior to the HSC-VSC collapse of the late-1960s/early-1970s (see below and chapter 7).

6.3.2. Consensus breakdown:

The *Two-Year War* was propelled by two increasingly-intertwined consensus crises that strained both the HSC and VSC: 1) communally-aligned disagreement over allowing the PRM to operate against Israel from Lebanese territory; and 2) a domestic socioeconomic protest movement against the aforementioned socioeconomic injustices:

The PRM issue developed following the defeat by Israel of the Arab conventional armies in 1967, which prompted the PRM to take liberation into its own hands¹³²⁸ – encouraged by the potentials of irregular warfare demonstrated by the *Viet Cong*, *FLN*¹³²⁹, Cuban revolutionaries, etc¹³³⁰. After initial attempts to operate within the *Occupied Palestinian Territories* proved unfeasible¹³³¹ the PRM resolved to operate from Arab states neighbouring Israel – chiefly Jordan and Lebanon – exhorting those states to be ‘Hanoi’ to Palestine’s ‘Seoul’¹³³².

The domestic protest movement began in 1964 following President Helou’s formation of a ‘Millionaires’ Cabinet’ of wealthy zu‘amā’ advocating neoliberal economic reforms that would reverse the reforms of Shihab’s largely technocratic cabinet¹³³³. Original protestor demands focused on wage increases, improved working conditions, and improved social protection¹³³⁴. However, by the early 1970s – driven by a unifying ideological narrative¹³³⁵ - these demands had diversified to include support for the PRM; use of Arabic as a language of

¹³²⁷ See below and chapter 7.

¹³²⁸ Kail C. Ellis, “Lebanon: The struggle of a small country in a regional context,” *Arab Studies Quarterly* 21(1) (Winter 1999), 8.

¹³²⁹ Aka the *Front de Libération Nationale*, the leftist-nationalist movement that led the successful Algerian independence struggle against France between 1954 and 1962.

¹³³⁰ See below and chapter 7.

¹³³¹ Paul Thomas Chamberlin, *The Global Offensive: The United States, the Palestine Liberation Organization, and the Making of the Post-Cold War Order* (Oxford: Oxford University Press, 2012), 26.

¹³³² Ibid.

¹³³³ Traboulsi, *A History of Modern Lebanon*, 147.

¹³³⁴ Ibid.

¹³³⁵ See below.

instruction in Lebanese Universities¹³³⁶, and various radical socioeconomic and socio-political demands¹³³⁷.

As the following analysis demonstrate, these two issues grew intertwined, resulting both from increasing cooperation and overlap between the domestic movement and the PRM and its Lebanese allies (facilitated by, and facilitating, mutual identification as being marginalised, neglected, and exploited by the political-cum-commercial elites), and from a shared ideological narrative provided by newly popularised Marxist-leaning ideologies/movements. From here, both *causes de jour* became polarised along confessional and class lines:

6.3.2.1. *HSC breakdown:*

The most direct challenge to the HSC was the PRM issue, which became a litmus test for National Pact adherence equivalent to the ‘Arab Cold War’ of the 1950s¹³³⁸. With the Arab Nationalist regimes discredited by the 1967 war¹³³⁹, the PRM became the new face of Arab anti-imperialism, dignity, vitality, and moral uprightness¹³⁴⁰. Failure by the Maronite President to support the PRM would, therefore, be an affront to Lebanon’s ‘Arab face’, constituting a transgression against the HSC, and reviving Sunni feelings of impotence and subjugation.

Problematically, the Maronite community – Presidents and Kataeb alike – did transgress the PRM *cause de jour* repeatedly. Helou initially offered some support to the PRM¹³⁴¹, but the Maronite community was alarmed by the presence of a large, armed, autonomous, Sunni-majority faction pursuing its own foreign policy (thus undermining Lebanese sovereignty, emboldening potential Sunni revanchist aspirations, and liable to embroil Lebanon in a war with Israeli)¹³⁴². These anxieties pushed the President to repeatedly deploy the LAF

¹³³⁶ Rather than the dominant French and English, which was seen to favour multi-lingual Francophone Maronites and considered a last vestige of imperialism. See Petran, *The Struggle over Lebanon*, 139-141.

¹³³⁷ Ibid.

¹³³⁸ Rabinovich, *The War for Lebanon*, 142.

¹³³⁹ See Chapter 7.

¹³⁴⁰ Indeed, el-Khazen speaks of this period as a “transition period symbolising the crossing from Nasserism to the Palestinian revolution” (Farid el-Khazen, *The Breakdown of the State in Lebanon 1967-1976* (London: I.B. Tauris Publishers, 2000), 145)).

¹³⁴¹ El Khazen, *The Breakdown of the State*, 136.

¹³⁴² This polarisation occurred for a number of reasons: 1) firstly, the Maronite community had viewed the defeat of the Arab conventional armies in 1967 as a demonstration of the futility of Lebanon’s participation in the Arab-Israeli conflict, and began to press for Lebanese isolationism (Petran, *The Struggle over Lebanon*, 96). This both naturally made them wary of allowing the

to curtail the PRM's freedom of operation¹³⁴³. Increasingly, these polarising operations drew in the active participation of Lebanese *non-state actors* [NSAs]: both Maronite militias launching paramilitary operations against the PRM¹³⁴⁴, and various Marxist-leaning movements, who rallied to defend the PRM against such attacks¹³⁴⁵. Maronite actions – both that of the militias and the LAF (under Presidential orders) were considered breaches of the National Pact¹³⁴⁶, while the mutual arms raise it provoked – aligning an alliance of predominantly non-Maronite Marxist-leaning Lebanese and PRM factions (see below) against the Maronite militias¹³⁴⁷ – enflamed the security dilemma and, resultantly, raised confessional tensions. Particularly troubling for the Sunni community was the President's usage of the LAF against the PRM (and the domestic protest movement – see below). The LAF's conduct towards the domestic and PRM *causes de jour*¹³⁴⁸ provoked a crisis in civil-military affairs which destroyed the

PRM to drag Lebanon into conflict with Israel, while making the non-Maronite communities support the PRM even more unreservedly in the face of what would be perceived as a Maronite attempt to shirk the National Pact's "Arab Face" stipulations. 2) the presence of a large, armed and mostly Sunni Palestinian population in Lebanon threatened to upset Lebanon's delicate communal balance (El Khazen, *The Breakdown of the State*, 363), and thus enflamed the Maronite siege mentality and ethnic conflict security dilemma. 3) Israel's deliberate targeting of Lebanon in reprisals to PRM raids launched from Lebanese territory convinced the Maronite community that the PRM was a threat – if not a direct affront – to Lebanese sovereignty, in that it's operations compromised Lebanon's ability to dictate its own foreign policy and foreign relations (Gilmour, *Lebanon*, 98). This perception was increased by the fact that the PRM began to receive large quantities of arms and other support from multiple and diverse foreign backers (e.g. Syria, Egypt, Libya, Iraq, Saudi Arabia, and even China); raising fears that the PRM would become tools for the agendas of hostile governments (William B. Quandt, "Palestinian Nationalism: Its Political and Military Dimensions," *RAND Corporation*, A Report prepared for the Assistant Secretary of Defense/International Security Affairs (Nov., 1971), 13 & 26).

¹³⁴³ Major LAF offensives against the PRM took place in November 1968, April 1969, March 1970, September 1972, May 1973, and July 1973. For good overviews of this period, see: Traboulsi, *A History of Modern Lebanon*; Naor, "The Quest"; Petran, *The Struggle over Lebanon*; Hanf, *Coexistence*; Karol R. Sorby, "Lebanon during the Shāril Ḥulw Presidency, 1964-1970", *Asian and African Studies* 21(1) (2012): pp. 86-105; and El Khazen, *The Breakdown of the State*.

¹³⁴⁴ Petran, *The Struggle over Lebanon*, 146.

¹³⁴⁵ Ibid.

¹³⁴⁶ Rabinovich, *The War for Lebanon*, 42.

¹³⁴⁷ Hanf, *Coexistence*, 167 and 187, for Maronite and LNM/PRM arms races, respectively.

¹³⁴⁸ This crisis in legitimacy resulted from several developments and episode: 1) On at least two occasions the LAF deliberately refused the orders of the PM in order to follow a distinctly Maronite agenda (in the June 1967 war the LAF refused Prime Ministerial orders to deploy against Israel (Gilmour, *Lebanon*, 71) and in April 1969 the LAF commenced offensive operations against the PRM without consulting the PM (Petran, *The Struggle over Lebanon*, 101)); 2) the LAF was accused of excessive brutality against domestic protestors; even employing artillery against civilian targets in Sidon in February 1975 (Gilmour, *Lebanon*, 111); 3) the LAF was accused of neglecting the defence of the country against external threats (i.e. Israel) while always being on hand to repress internal elements (the domestic protest movement and the PRM) (Traboulsi, *A History of Modern Lebanon*, 176); and 4) finally, in its conduct towards the domestic protest movement and the PRM, the LAF was accused of having become a tool for enforcing a hegemonic Maronite political agenda; and of colluding directly with Maronite militias (Gilmour, *Lebanon*, 111).

LAF's reputation – forged under Shihab during the *Lebanese Crisis* – as a neutral arbiter in Lebanese affairs, coming to instead be seen as a tool for enforcing Maronite hegemony¹³⁴⁹. This perception of the Maronite community having captured the state armed forces enflamed the security dilemma to unprecedented levels; resulting in an ever-greater reliance – on the part of the non-Maronite menu people – on armed NSAs (see below). This, in turn, heightened the Maronite security dilemma/siege mentality, prompting greater assertiveness on the part of the Presidents and Kataeb.

It was not inevitable that the domestic protest movement would strain the HSC. Initially, the movement seemed poised to erase horizontal tensions and unite the menu people against the political-commercial elites. The diagnostic narratives escalating and sustaining the protest movement understood the issue in explicitly classist, non-confessional terms, and proposed that, rather than the VSCs regulating the HSC (empowering the elites of each confessional community to prevent any one community from dominating the others), the HSC was actually an artificial divide-and-rule tool perpetuated to sustain the VSCs (using the artificial threat of a confessional security dilemma to keep the menu people uncritically dependent on their respective zu'amā' who, in reality, shared the same interests and objectives across communities)¹³⁵⁰. However, while the zu'amā' of all confessions were visibly complicit in transgressing this *cause de jour*¹³⁵¹, Maronite complicity was emphasised because:

- 1) Most monopolies (a major symbol of grievance) were headed by Maronite zu'amā'¹³⁵²;
- 2) The Maronite zu'amā' rallied particularly intransigently against reformist demands¹³⁵³;
- 3) The Kataeb coordinated mass counter-demonstrations (the Maronite zu'amā' again depicting calls for reform as a trojan horse for Sunni revanchism/existential anti-Maronite hostility),¹³⁵⁴ lending a popular confessional hue to the conflict by making the Maronite menu people

¹³⁴⁹ Ibid, 111.

¹³⁵⁰ This ideological narrative is explored below and in chapter 7.

¹³⁵¹ See below.

¹³⁵² Traboulsi, *A History of Modern Lebanon*, 158.

¹³⁵³ Ibid, 148.

¹³⁵⁴ Ibid.

appear complicit in the repression of the protest movement and in defence of socioeconomic privileges acquired at the expense of non-Maronites;

4) The conflation of the domestic protest movement and PRM *causes de jour* meant that overt confessional polarisation over the PRM issue became conflated with confessional polarisation over domestic socioeconomic issues. As noted, this conflation fostered the perception that Maronite menu people aggressions against the PRM equated to Maronite menu people complicity in the broader repression, neglect, and exploitation of the non-Maronite menu people, an equation reified by the continuing horizontal wealth disparities.

6.3.2.2. VSC breakdown:

While this Marxist-leaning ideological narrative questioned the validity and benevolence of the VSC, the Sunni *zu'amā'* lent it credence by repeatedly and visibly transgressing against the domestic movement. Not only were the *zu'amā'* held responsible for socioeconomic grievances in the first place, but they also responded to the movement's demands with demonization¹³⁵⁵ and repression¹³⁵⁶; violently so in the Sunni-majority North¹³⁵⁷. Meanwhile, attempts to address socioeconomic grievances were derailed by the *zu'amā'*¹³⁵⁸. This, more than ever before, highlighted the *zu'amā'*'s direct complicity in the suffering of the menu people, leading, Khalaf and Denoeux assert, to an increasing belief among the menu people that their *zu'amā'* were paying only lip service to their interests, while in reality sharing the interests of the Maronite establishment (and the

¹³⁵⁵ Condemnation of the protest movement was often transparently capitalist. Pierre Gemayel blasted the farmers' strike as being the work of foreign agents wishing to "destroy the economic system in Lebanon" (Petran, *The Struggle over Lebanon*, 83); while Sa'ib Salam responded in a similar way to teachers' strikes in 1973 (Traboulsi, *A History of Modern Lebanon*, 171).

¹³⁵⁶ Petran, *The Struggle over Lebanon*, 85, 90, 97 & 130.

¹³⁵⁷ Between 1968 and the outbreak of the *Two Year War*, farm workers in Akkar launched a violent insurgency against the exploitation of their landlords, prompting harsh repression from the LAF, police and even some *zu'amā'* militias (Ibid. 135).

¹³⁵⁸ Notably, in 1970, PM Salam realised that, in the face of the domestic movement, there was a need to carry out "a revolution from above, to prevent a revolution from below" (Traboulsi, *A History of Modern Lebanon*, 173). To this end he recruited a cabinet of technocrats (the so-called *Youth Cabinet*) with an explicit mandate to reform the political system, economy and education system. However, the cabinet's ministers were forced to resign one by one as a result of intransigence, lobbying and pressure from the *zu'amā'*, who were determined to defend their financial interests (Dan Naor, "The Quest for a balance of power in Lebanon during Suleiman Frangieh's Presidency, 1970-76", *Middle Eastern Studies*, 49(6) (2013), 992).

capitalist, exploitative class more generally)¹³⁵⁹. This rendered the VSC increasingly bankrupt and chimerical.

More directly prompting the *Two-Year War* was the PRM issue, which strained the Sunni VSC in much the same way as the previous Arab Cold War had. Encountering the Presidents' divisive policy towards the PRM, the Sunni *zu'amā'* suffered a repeat of their predicament under Chamoun, once again finding their only recourse against arbitrary Presidential rule was to resign in protest¹³⁶⁰. Additionally, after the resignation of PM Salam in 1973, Frangieh returned to Chamoun's strategy of appointing low ranking, politically beholden, Sunni *zu'amā'* as PM¹³⁶¹. Worse still, in contrast to 1958, the Sunni *zu'amā'* did not mobilise and arm the Sunni menu people – or assume leadership over the popularising ideological trend (it directly threatening their class interests) - as a counter measure against the growth of predatory Maronite militias and a compromised LAF, meaning that, in this state of enflamed security dilemma, the Sunni menu people had to look elsewhere for empowerment and protection.

6.3.3. Ideological competition:

As in 1958, while transgressions against the *causes de jour* pushed the Sunni menu people towards revolt, they were *pulled* towards it by an emergent ideological movement offering new, *status quo* realism-busting diagnostic and prognostic frames through which to understand and attribute unified causation to their various woes and propose radical solutions to them based on more than mere tweaks to the *status quo*. Moreover, even more so than Nasserism had, this

¹³⁵⁹ Khalaf and Denoeux, "Urban Networks," 187.

¹³⁶⁰This occurred on five separate occasions between 1969 and the start of the Two-Year War: 1) January 1969: PM al-Yafi resigned in the wake of massive protests following the December 1968 Israeli raid on Beirut International Airport (Sorby, *Lebanon during the Shāril Ḥulw Presidency*, 101); 2) March 1969: PM Karami resigned after the LAF opened fire on demonstrators protesting military operations being conducted to restrain the PRM following the December 1968 airport raid (Traboulsi, *A History of Modern Lebanon*, 155); 3) April 1973: PM Salam resigned in the face of massive anti-LAF demonstrations after its failure to interdict Israeli commandos who had assassinated PLO leaders in Beirut (Petran, *The Struggle over Lebanon*, 145); 4) September 1974: PM Taqi al-Din al-Suhl resigned following further LAF-Maronite Militia clashes with the PRM; and allegations of LAF complicity in facilitating arms shipments to the Maronite militias (Traboulsi, *A History of Modern Lebanon*, 188); and 5) May 1975: PM Rashid al-Suhl resigned in protest of an attack by Kataeb gunmen on a bus carrying Palestinian refugees (Ibid, 194).

¹³⁶¹ Hanf, *Coexistence*, 129.

new ideological trend provided seemingly firm strategic frames guiding how the menu people could take the realisation of those solutions into their own hands¹³⁶².

This took the form of a growing, increasingly unified conglomeration of Marxist-Leninist-Maoist-leaning movements¹³⁶³, including both Lebanese factions (notably the CPL¹³⁶⁴, ANM and its post-1967 splinter factions¹³⁶⁵, the SSNP, Syrian and Iraqi Ba'ath Parties, and the *Progressive Socialist Party* [PSP]¹³⁶⁶ headed by Druze za'īm Kamal Jumblatt, which were united in 1965 under the *Front of Progressive Parties, Organisations and Personalities* [FPPOP]¹³⁶⁷ and later (in 1969) expanded to form the LNM¹³⁶⁸) and PRM factions (notably the *Fatah-led Palestinian Liberation Organisation* [PLO]¹³⁶⁹, alongside factions of the *Palestinian Rejectionist Front* [PRF]¹³⁷⁰ such as the *Popular Front*

¹³⁶² See below.

¹³⁶³ Explored in more detail in chapter 7.

¹³⁶⁴ The CPL revised its ideological stance following its marginal role in the 1958 crisis, adopting a pro-Palestinian, Arabist platform with rhetoric focussed upon criticism of the commercial elite, the National Pact and the Arab regimes (post-1967 war). The group saw the conflict through a classist analysis, fought between the “political confessional capitalistic feudalistic class” on one hand, and the “secular poor working class” on the other. See: Deeb, *The Lebanese Civil War*, 66; Picard, *Lebanon*, 100 & 306.

¹³⁶⁵ The ANM splintered following the Arab defeat in the 1967, reorienting from a primarily pan-Arab Nationalist to Marxist-Leninist ideological bent. In particular, former-ANM leader George Habash formed the *Arab Socialist Action Party* [ASAP] which advocated violent revolution against the capitalist elites as the only feasible means of ending “feudalism and bourgeois rule” (Ismael, *The Arab Left*, 99; Karma Khayat, “The Left: Can it be right for Lebanon? The path and prospects of the Leftist Movement in Lebanon”, Masters Diss., *Lebanese American University*, 2012, 20). The *Organisation of Communist Action in Lebanon* [OCAL], another ANM splinter, adopted a more Maoist-leaning ideological lens, and similarly demonised Lebanon’s zu’amā’ as responsible for colluding with imperialists to exploit the menu people (Hitti, “The Republic of Lebanon,” 223; Khayat, *The Left*, 13-17).

¹³⁶⁶ The PSP conceived itself as a cross-confessional, socialist and modernist party opposing what it considered to be Lebanon’s feudal confessional consociationist system. It called for secularisation and the abolition of confessionalism, viewing such institutions as tools for perpetuating entrenched zu’amā’ privileges and exploited of the menu people. See: Yusri Hazran, “Lebanon’s Revolutionary Era: Kamal Junblat, the Druze Community and the Lebanon State, 1949 to 1977,” *The Muslim World* 100 (Jan., 2010), 161.

¹³⁶⁷ Deeb, *The Lebanese Civil War*, 62.

¹³⁶⁸ Quandt, *Palestinian Nationalism*, 26.

¹³⁶⁹ Under Fatah, the PLO maintained a deliberately vague ideological platform so as to avoid alienating potential foreign backers. However, it betrayed its leftist leanings through its identification of ‘imperialism’ (alongside Zionism) as its primary enemy – a discursive theme consonant with the more overtly leftist factions of the LNM-PRM alongside leftist movements internationally. Moreover, it identified itself as being in common cause with all Third World anti-imperialist movements and advocated for a people’s liberation war in the style of Mao Tse-Tung, the Viet Cong, Che Guevara, and the Algerian FLN. See: S. Shamir Hassan, “Al-Fatah – a study of Ideological Evolution,” *Proceedings of the Indian History Congress* 61, Part Two: Millenium (2000-2001), 1136-38; Quandt, *Palestinian Nationalism*, 13 & 26; Manfred Sing, “Brothers in Arms: How Palestinian Maoists turned Jihadists,” *Die Welt des Islams* 51(1) (2011), 12; and Mordechai Nisan, “The PLO and Vietnam: National Liberation Models for Palestinian Struggle,” *Small Wars & Insurgencies* 4(2) (1993), 182 & 193-195.

¹³⁷⁰ The PRF splintered from the PLO in June 1974 following its rejection of the PLO’s acquiescence to negotiations based on a two-state solution for Israel-Palestine. See: Hanf, *Coexistence*, 185.

for the Liberation of Palestine [PFLP]¹³⁷¹ and the Democratic Popular Front for the Liberation of Palestine [DPFLP]¹³⁷², etc.¹³⁷³) who succeeded in recruiting large numbers of Lebanese.

While it is important to recognise the ideological distinctions dividing these various groups¹³⁷⁴, the menu people generally joined whichever group was dominant in their neighbourhood (or was supported by the neighbourhood *Qabaday*)¹³⁷⁵. Their appeal lay less in doctrinal nuances (e.g., between Marxism-Leninism and Maoism, or between proletarian revolution and agrarian ‘people’s war’) as in the vague attributions of causation, blame, and solidarity, on one hand, and blueprints, justifications, organisation, resources, and mechanisms for affecting change on the other (which were broadly shared across factions)¹³⁷⁶. Moreover, these Lebanese and Palestinian factions intertwined both organisationally¹³⁷⁷ and ideologically¹³⁷⁸. Specifically, they pulled the Sunni menu people towards sustained and radical anti-establishment revolt by providing:

¹³⁷¹ The PFLP advocated Marxist-Leninist revolution to depose the corrupt Arab regimes, which it held responsible for betraying the Arab/Palestinian cause by selling themselves to international capitalist imperialism. See: Quandt, *Palestinian Nationalism*, 62; Mehmood Hussain, “The Palestine Liberation Movement and Arab Regimes: The Great Betrayal,” *Economic and Political Weekly* 8(45) (Nov., 1973), 2023.

¹³⁷² The DPFLP espoused the same ideology as the PFLP. Its splintering from the PFLP was rooted in its belief that the PFLP was too superficial in its espousal of that ideology. See: Quandt, *Palestinian Nationalism*, 46; Faris Giacaman, “Political Representation and Armed Struggle,” *Journal of Palestine Studies* 43(1) (Autumn 2013), 29.

¹³⁷³ The PRF additionally included the *The Popular Front for the Liberation of Palestine – General Command* [PFLP-GC] (which, like the DPFLP, splintered from the PFLP for pedantic ideological reasons (Quandt, *Palestinian Nationalism*, 21 & 26); the *Sa’iqa Brigade* (whose ideological stance was similar to Fatah – rejecting the anti-Arab regime stance of the PRF’s other factions on account of its close supervision by the Syrian regime (Ibid, 24)); and the *Arab Liberation Front* [ALF] which basically functioned as an Iraq-supervised equivalent – and closeted rival - to Sa’iqa (Ibid, 24-26).

¹³⁷⁴ As noted in the above footnotes.

¹³⁷⁵ This is particularly well illustrated in Johnson, *Class and Client*.

¹³⁷⁶ As further discussed in chapter 7.

¹³⁷⁷ Organisationally, the factions of the FPPOP/LNM forged cooperative partnerships with the factions of the PRM, most notably through the 1972 formation of the *Arab Front for the Support of the Palestinian Revolution* under the leadership of LNM leader Kamal Jumblatt. Several LNM factions (notably the CPL, ANM, *pro-Iraqi* and *pro-Syrian Ba’ath Parties*, and the OCAL), formed armed wings that directly operated under the PRM, and individual factions from the LNM established direct partnerships with their PRM equivalents (*pro-Syrian Ba’ath* with *Sa’iqa*, the *pro-Iraqi Ba’ath* with the ALF, the CPL with the DPFLP, and the OCAL with the PFLP, etc.) through which they acquired financial, material and training support, both from the PRM itself, and the PRM’s Arab backers (notably Libya and Iraq). See: Farid al-Khazen, “Kamal Jumblatt, the Uncrowned Druze Prince of the Left,” *Middle Eastern Studies* 24(2) (Apr., 1988), 181; Ismael, *The Arab Left*, 94; El Khazen, *The Breakdown of the State*, 74; Deeb, *The Lebanese Civil War*, 66; and Hanf, *Coexistence*, 169.

¹³⁷⁸ Ideologically, the two movements fused over a shared anti-capitalist/anti-imperialist narrative and Third Worldist identity (see below), with both movements invoking recent global examples of anti-imperialist/anti-capitalist mobilisations as both natural comrades and exemplars (notably the Algerian FLN, Viet Cong and Cuban revolutionaries). This, alongside the heroism of the PRM, led in turn to the PRM becoming increasingly identified by the Sunni-Lebanese menu people (and

- 1) Diagnostic frames interpreting both the failures of the Arab regimes to militarily defeat Israel and/or support the PRM, and the predatory capitalist adventurism dominating daily life for the Lebanese menu people, as symptoms of an Arab (and particularly Lebanese) elite rendered subservient to imperialism and unscrupulously exploitative of their own constituents by their capitalist interests¹³⁷⁹. The movement's 'enemies' were defined variously as "imperialism,"¹³⁸⁰ the forces of "Arab reaction"¹³⁸¹, "corrupt Arab regimes,"¹³⁸² the "political confessional capitalistic feudalistic class"¹³⁸³, the Maronite establishment and the traditional Sunni zu'ama'¹³⁸⁴, etc. One aspect of this was the above-noted reinterpretation of the VSC from being a mechanism for regulating the HSC towards being a tool for maintaining the menu people's dependence on their confessional zu'ama', giving the latter *carte blanche* to exploit them¹³⁸⁵.
- 2) A compelling *status quo* realism-busting basic prognosis offering simple and far-reaching resolutions to that problem (by violently extirpating the corrupt HSC-VSC nexus that protected entrenched interests, and replacing it with some form of secular, non-confessional, socialist state), translated into a clear, attainable advanced prognosis (expressed in the LNM-PRM's 1975 manifesto/war demands, entitled

LNM more broadly) as a vanguard for – and harbingers of – the revolutionary change sought by the domestic movement. See: Petran, *The Struggle over Lebanon*, 97; El Khazen, *The Breakdown of the State*, 137; Hussain, *The Palestine Liberation Movement*, 2206; and Abbas Shibliak, "Palestinians in Lebanon and the PLO," *Journal of Refugee Studies* 10(3) (1997), 264.

¹³⁷⁹ In part this was initiated by Nasser's post-UAR collapse (1961) ideologically shift towards revolutionary socialism against reactionary feudal, capitalist Arab elites and their imperialist allies (Ismael and Ismael, *The Arab Left*, 79) but was seized upon and radicalised by the likes of the PRF (Hussain, "The Palestine Liberation Movement, 2023); the CPL (Picard, *Lebanon*, 100 & 306); the OCAL (Khayat, *The Left*, 13-17); etc. More generally, see: Shibliak, "Palestinians," 264.

¹³⁸⁰ Notably the PRF (Mehmood Hussain, "The Palestine Liberation Movement and Arab Regimes: The Great Betrayal," *Economic and Political Weekly* 8(45) (Nov., 1973), 2023) and Fatah (Hassan, *Al-Fatah*, 1138).

¹³⁸¹ Notably the PRF (Hussain, "The Palestine Liberation Movement, 2023).

¹³⁸² Notably the PFLP (Quandt, *Palestinian Nationalism*, 62).

¹³⁸³ Notably the CPL (Picard, *Lebanon*, 306); the ASAP (Khayat, *The Left*, 20); the *Independent Nasserite Movement* [INM] (Ismael, *The Arab Left*, 79); and the PSP (Hazran, "Lebanon's Revolutionary Era," 161).

¹³⁸⁴ Notably the three indigenous Sunni-Lebanese factions during the civil war: the INM, the *Popular Nasserite Organisation* (PNO), and the *October 24th Movement*. See: Ismael, *The Arab Left*, 79; Daniel Baracskey, *The Palestine Liberation Organization: Terrorism and Prospects for Peace in the Holy Land* (Santa Barbara: Praeger, 2011), 114, respectively.

¹³⁸⁵ Hazran, "Lebanon's Revolutionary Era," 161; Picard, *Lebanon*, 306; Meir Zamir, "The Lebanese Presidential elections of 1970 and their impact on the civil war of 1975-1976", *Middle Eastern Studies* 16(1) (1980), 63.

the *Transitional Programme for the Democratic Reform of the Lebanese System*¹³⁸⁶).

- 3) Empowering strategic frames citing genuine, recent precedents for success. Specifically, LNM-PRM factions routinely cited the successful anti-imperialist ‘people’s war’ insurgencies of the Chinese *People’s Liberation Army*, Algerian FLN, *Vietcong*, and Cuban Revolutionaries¹³⁸⁷ – as well as less violent examples of successful ‘people power’ mobilisations such as the 1968 French and US student movements¹³⁸⁸ – as exemplars for feasible action against capitalist regimes and their imperialist backers.
- 4) Prototypical and effective leadership, particularly in the form of LNM leader Kamal Jumblatt who, despite belonging to the zu‘amā’ class, contrasted against the revealed self-serving nature of that class by refusing to put his own commercial interests above the interests of the Lebanese menu people (a stance that simultaneously heightened popular resentment towards the rest of the zu‘amā’)¹³⁸⁹. The LNM-PRM factions boasted similarly prototypical leaders, fighting heroically against the perceived enemies of the menu people, in distinct contrast to their own zu‘amā’; providing for the material welfare of the menu people as the zu‘amā’s patronage networks were faltering¹³⁹⁰; championing the domestic protest movement while the latter were demonising and repressing it, and actively supporting the PRM – through armed militancy – while the latter could only tender their resignations in protest at Maronite/LAF transgressions.
- 5) An opportunity to burnish Sunni menu people ‘pride’ and ‘respect’ by reorienting their identity from powerless victims of their own elites to heroic, capable agents of revolutionary change embarking on a

¹³⁸⁶ This manifesto sought to abolish the system of HSCs and VSCs which the anti-*status quo* forces now considered a tool not for enshrining the rights of each confessional community, but rather for rendering the menu people dependent on their elites in such a way that enabled the elites to exploit them at will. Specifically, the programme demanded: 1) The abolition of the system of political and administrative sectarian quotas; 2) A voluntary civil code for personal status; 3) A new electoral law based on proportional representation; 4) Extensive administrative decentralisation and the convocation of a constituent assembly on a non-sectarian basis. See: Traboulsi, *A History of Modern Lebanon*, 195.

¹³⁸⁷ Adeed Dawisha, *Arab Nationalism in the Twentieth Century: From Triumph to Despair* (Princeton: Princeton University Press, 2003), 258; Nisan, “The PLO,” 193-195.

¹³⁸⁸ Petran, *The Struggle over Lebanon*, 123.

¹³⁸⁹ Quandt, *Palestinian Nationalism*, 26; El Khazen, *The Breakdown of the State*, 182.

¹³⁹⁰ See chapter 7.

teleological, global 'Third Worldist' revolution against imperialist world capitalism¹³⁹¹.

The impact of these movements was substantial. Prior to their popularisation, the domestic protest movement exhibited what Lenin called "trade union consciousness" in which the aggrieved agitate sporadically and reactively against specific provocations (rather than proactively against systemic injustices), while demanding redress within the framework of the establishment ideology, rather than revolutionary consciousness in which the aggrieved reject the *status quo* in its entirety and agitate for its radical restructuring¹³⁹². When these movements began assuming leadership over the movement, however, demands became more radical and comprehensive, finding their direction in a broad, unifying ideological worldview that linked their specific localised grievances to a broader global grievance narrative targeting imperialism and international capitalism¹³⁹³. Similarly, outrage over transgressions against the PRM initially provoked only 'non-modular' protests (i.e., sporadic and reactive expressions of outrage - e.g., riots - aimed at demanding resolutions within the framework of the establishment ideology - particularly urging action from the Sunni zu'amā') as contrasted to proactive, sustained 'modular' activism demanding radical systemic change informed by a comprehensive ideological worldview, as it would evolve into under tutelage of these increasingly collaborative movements¹³⁹⁴.

Conversely, the ability of these movements to popularise and assume leadership was made possible by the VSC's collapse. Traditionally, such class-oriented movements had been proscribed¹³⁹⁵ and demonised¹³⁹⁶ by the zu'amā', who used their patronage (and the threat of withdrawing it) to keep their constituents in line¹³⁹⁷, and established parallel 'leftist' institutions (particularly trade unions)

¹³⁹¹ Rather than continuing to identify as a weak, subordinate community in Lebanon, represented by corrupt elites, the factions of the LNM-PRM invoked alternative, positive identities as comrades in arms with heroic and morally-pedestalled Third World anti-imperialist movements the world over – from the Viet Cong to the FLN, Mao Tse Tung to 'Che' Guevara (Nisan, "The PLO," 182).

¹³⁹² Lenin, *What is to be done?* 18.

¹³⁹³ See footnotes 1507-1513 above.

¹³⁹⁴ As noted above.

¹³⁹⁵ Deeb, *The Lebanese Civil War*, 65.

¹³⁹⁶ As noted in chapter 5.

¹³⁹⁷ Ibid; Salloukh et al, *The Politics of Sectarianism*, 17.

through which to allow class tensions to vent in a controlled manner¹³⁹⁸ (it is notable that the domestic protest movement witnessed an unprecedented increase in wild-cat strikes in defiance of these zu‘amā’ controlled unions¹³⁹⁹ as the VSC broke down). The VSC crisis enabled these groups to present themselves as purer alternatives to the morally bankrupt zu‘amā’ and, indeed, their appeal was magnified by the observed disparity between the zu‘amā’s inaction and their own stalwart defence of the menu people and the PRM¹⁴⁰⁰. Additionally, the zu‘amā’s inability to reign in the Maronite Presidency, LAF, and Maronite militias – coupled with their failure to mobilise their own paramilitary forces to protect their constituents – handed initiative to the heavily-armed, determined LNM-PRM who, as well as offering protection and agency¹⁴⁰¹, also usurped faltering zu‘amā’ patronage networks (helping to wean the menu people off zu‘amā’ dependence) and co-opted the vital, alienated Qabadays – who became leaders of Sunni-Lebanese PRM client factions¹⁴⁰² - thanks to the distributable largesse provided by their formidable foreign benefactors¹⁴⁰³.

6.3.4. Escalation into violence:

Two incidents are typically considered the “Sarajevo” moments of the *Two-Year of War* and, conveniently, the first stands out as the Sarajevo of the domestic *cause de jour*, and the latter as the Sarajevo of the PRM *cause de jour*. In reality, however, there was little to distinguish these incidents from the many sporadic outbreaks of violence and outrage that had erupted and receded previously, and,

¹³⁹⁸ Nick Chafic Kardahji, “A Deal with the Devil: The Political Economy of Lebanon, 1943-75” PhD diss., *University of California, Berkeley*, 2015, 150-152.

¹³⁹⁹ Traboulsi, *A History of Modern Lebanon*, 170.

¹⁴⁰⁰ El Khazen, *The Breakdown of the State*, 73.

¹⁴⁰¹ The Sunni-Lebanese menu people frequently referred to the PRM as *the ‘Sunni Army’*; see: *Ibid*, 208.

¹⁴⁰² Johnson, *Class and Client*, 179; Hanf, *Coexistence*, 169; El Khazen, *The Breakdown of the State*, 365.

¹⁴⁰³ William Harris, *Lebanon: A History, 600-2011* (Oxford: Oxford University Press, 2012), 196. For example, of the indigenous Lebanese groups, the major Sunni-Lebanese factions operative during the *Two-Year War* (the Beirut-based INM; Sidon-based PNO; and Tripoli-based *October 24th Movement*) all received direct financial, material and training support from the PLO and external sponsorship from Libya (el Khazen, *The Breakdown of the State*, 365; Tony Badran, “Lebanon’s Militia Wars,” in *Conflict and Insurgency in the Contemporary Middle East*, eds. Barry Rubin (New York: Routledge, 2009), 169; and Deeb, *The Lebanese Civil War*, 69); while the Syrian SSNP was also supported by Libya (El Khazen, *The Breakdown of the State*, 74). Of the Palestinian factions, the PLO was supported by Kuwait, Syria, Egypt, Libya, Iraq and China (Quandt, *Palestinian Nationalism*, 13 and 26; Sing, “Brothers in Arms,” 12); the PFLP was supported by Iraq and Libya (Quandt, *Palestinian Nationalism*, 26), the ALF by Iraq (*Ibid*, 26); and the DPFLP, PFLP-GC, and *Sa’iqa Brigade* were all supported by Syria (*Ibid*, 26; and Hussain, “The Palestine Liberation Movement,” 2026).

initially, there was little to suggest that these new flare ups would not dissipate in the same fashion¹⁴⁰⁴. So rather than devoting undue attention to the specifics of these two events – the February 1975 Sidon Fishermen’s protest and the April 1975 Ein al-Rummaneh massacre – both of which are discussed in detail elsewhere¹⁴⁰⁵; suffice it to say that their immediate impact was to prompt spontaneous outbreaks of communal violence essentially similar to those previous, periodical flare ups between Maronite militias and fighters of the LNM-PRM alliance. Both events initially dissipated after just a few days following the imposition of shaky ceasefires¹⁴⁰⁶. What appears to have made these incidents novel was the apparent decision by the Kataeb Party to deliberately escalate the conflict following these ceasefires; allegedly in the hope of provoking the LAF into decisively intervening against LNM-PRM militancy once and for all. The post-Ayn al-Rummaneh ceasefire was immediately broken by Kataeb snipers, which in turn provoked spontaneous clashes between LNM-PRM and Maronite militiamen across Beirut¹⁴⁰⁷. Though few seem to have realised it at the time, the *Two-Year War* had commenced.

6.3.5. ‘Conflict resolution’ and restoration of *status quo* interbellum:

Several detailed narratives exist on the *Two-Year War*, all providing detail far beyond the scope of this overview¹⁴⁰⁸. Essentially, however, as in 1958, the conflict pitted the Maronite community (in the form of President Frangieh and allied Maronite militias – the so-called *Lebanese Front*¹⁴⁰⁹) against everyone else

¹⁴⁰⁴ Gilmour, *Lebanon*, 111.

¹⁴⁰⁵ See: Gilmour, *Lebanon*, 110-113; Traboulsi, *A History of Modern Lebanon*, 189-193; and Hanf, *Coexistence*, 204-205.

¹⁴⁰⁶ Gilmour, *Lebanon*, 113.

¹⁴⁰⁷ Ibid.

¹⁴⁰⁸ The best being: Gilmour, *Lebanon*; Hanf, *Coexistence*; Karol R. Sorby, “Syria and the 1975-76 Civil War in Lebanon,” *Asian and African Studies* 20(2) (2011); Traboulsi, *A History of Modern Lebanon*; and Rabinovich, *The War for Lebanon*.

¹⁴⁰⁹ In contrast to the LNM-PRM, the pro-establishment forces were far more homogenous than they had been in 1958, particularly with the defection of the SSNP to the opposition. The *Lebanese Front* (as they became officially known in 1976) was exclusively Maronite in composition, and its factions defined themselves as such (For a particularly visceral account, see: Philip Mansel, *Levant: Splendour and Catastrophe on the Mediterranean* (London: John Murray (Publishers), 2010), 330). The largest force was, as in 1958, the Kataeb (10,000 fighters under Pierre Gemayel) (Gilmour, *Lebanon*, 123). It was augmented by the “Tigers” militia of Camille Chamoun’s “National Liberal Party” (5,000 men) and the “Zghorta Liberation Army” of President Frangieh (5,000 men) (Ibid). They were augmented by numerous smaller, extremist Maronite groups, most notably the clerically-led “Guardians of the Cedars” and Kataeb splinter, “al-Tanzīm” (Ibid). Though they had their differences (Hanf has dubbed Gemayel as the “Dove” of the LF, and Chamoun as the “Hawk” (Hanf, *Coexistence*, 192)), they were essentially united in their determination to prevent political reforms through force of arms (Traboulsi, *A History of Modern Lebanon*, 193) and the restraining (if not expulsion) of the PRM (Ibid, 199). While the fighters of

(mobilised under the LNM-PRM alliance). In contrast to 1958, however, the LAF declined to adopt a neutral stance and was accused of pro-Maronite bias throughout the conflict¹⁴¹⁰, resulting, in January 1976, in the confessional fragmentation of the LAF - an anti-Maronite *Lebanese Arab Army* mutinying and making common cause with the LNM-PRM alliance to form the *Joint Forces*¹⁴¹¹. This confessional polarisation manifested in confessional massacres and cleansing operations by both sides. So salient was this confessional element that those few Maronites fighting for the *Joint Forces* were often persecuted by non-Maronite fighters¹⁴¹². An additional crucial difference to 1958 was the Sunni zu‘amā’s decision not to assume leadership of their constituents and their cause (even as lip service); their desire being to maintain (hopefully with some beneficial amendments) the HSC-VSC nexus¹⁴¹³, while the LNM-PRM sought explicitly to abolish it.

As in 1958, the anti-establishment forces scored early victories, with most non-Maronite population centres immediately falling under their control, including the main Sunni population centres of Tripoli, West Beirut, and Sidon¹⁴¹⁴. This once again encouraged mutual intransigence, encapsulated in the *Joint Forces* mantra of “No security without reforms”, vs. the *Lebanese Front’s* counter-mantra of “No reforms without security.”¹⁴¹⁵

The final parallel with the *Lebanese Crisis* is that the conflict was ended by external interventionist coercion; this time by Syria’s President Hafez al-Assad, who feared a *Joint Forces* victory would destabilise his regime by 1) creating a pro-Israeli Maronite rump-state¹⁴¹⁶; 2) provoking an Israeli military intervention

the LNM-PRM spanned the confessional divide, and typically did not identify along confessional lines, membership of the LF was almost exclusively Maronite, while Maronites rarely sided with the LNM-PRM.

¹⁴¹⁰ Traboulsi, *A History of Modern Lebanon*, 196.

¹⁴¹¹ Hanf, *Coexistence*, 215.

¹⁴¹² Gilmour, *Lebanon*, 127-128; Traboulsi, *A History of Modern Lebanon*, 199; Rabinovich, *The War for Lebanon*, 150; and Hanf, *Coexistence*, 212.

¹⁴¹³ Notably, the Sunni zu‘amā favoured the ‘Constitutional Charter’ proposed to end the conflict in January 1976 which, like Shihab’s post-1958 conflict redistributive tweaks, proposed small redistributive tweaks to the HSC (e.g., amending confessional representation in parliament from 6:5 Christians to Muslims to an equal 5:5; shifting the prerogative for choosing the Sunni PM from the Maronite Presidency to the Parliament, etc). In contrast, the LNM-PRM – represented in talks by Druze za‘im Kamal Jumblatt – was intransigent against it, condemning it as benefiting only the aloof Sunni zu‘amā and not the people. He was instead committed to “total revolutionary victory” according to the LNM-PRM’s *Transitional Programme for the Democratic Reform of the Lebanese System* outlined above. See: Petran, *The Struggle over Lebanon*, 189-190.

¹⁴¹⁴ By March 1976, the Joint Forces were in possession of 80% of Lebanese territory: Traboulsi, *A History of Modern Lebanon*, 200.

¹⁴¹⁵ Sorby, *Syria*, 201.

¹⁴¹⁶ Hanf, *Coexistence*, 208.

that Syria would be compelled (to maintain its Arabist credentials) to confront¹⁴¹⁷; and 3) installing a radical, revolutionary regime that might promote/inspire revolution against his own¹⁴¹⁸. After seven months of fighting, Syrian forces brought the *Joint Forces* to the brink of defeat in September 1976¹⁴¹⁹, and Saudi Arabia convened the *Riyadh Summit* to end the fighting. The *Riyadh Summit*, and the subsequent *Arab League Cairo Conference*, reached a resolution that all but two of the Arab League's twenty-one member states (Iraq and Libya) agreed to¹⁴²⁰. However, it was less a peace agreement than a legitimization of Syria's military occupation¹⁴²¹. It addressed none of the *Joint Forces'* demands, merely rebranding its subjugation as a 'Peace Agreement'¹⁴²². Unsurprisingly, this phantom peace did not last. Within a year, conflict reignited, degenerating into a much larger civil war that would last until 1990 and become so convoluted that the Sunni men people would forget what they were fighting for¹⁴²³.

6.4. The 2012-2014 Sunni Insurrections:

The *Sunni Insurrections* heuristically groups a series of violent skirmishes taking place during this period; pitting Sunni-Lebanese gunmen – espousing a loose, variable sectarian Islamist ideology¹⁴²⁴ - against the LAF, Hezbollah, and Lebanese allies of the Syrian regime; notably the Alawite community of Tripoli, pro-Hezbollah Sunni Islamist groups, and the militias of pro-Assad Sunni *zu'ama'*¹⁴²⁵. These clashes coincided with the participation of many Lebanese

¹⁴¹⁷ Rabinovich, *The War for Lebanon*, 48.

¹⁴¹⁸ Hirst, *Beware of Small States*, 113.

¹⁴¹⁹ Rabinovich, *The War for Lebanon*, 55.

¹⁴²⁰ Gilmour, *Lebanon*, 141-142.

¹⁴²¹ The agreement stipulated 1) the deployment of a 30,000-man peace keeping force: the *Arab Deterrent Force* [ADF] (In reality a simple expansion and rebranding of the Syrian troops already occupying Lebanon, augmented by token contingents from the UAE, Saudi Arabia, North Yemen and Sudan). The force would be under the nominal command of new Lebanese President Sarkis, and would be financed by the oil-producing Gulf States; 2) the 1969 *Cairo Agreement* (which permitted the PRM autonomy within Lebanese-based Palestinian refugee camps) would be implemented; 3) all militant groups would return to the locations they held prior to the commencement of the Two-Year War; and 3) all heavy weapons would be submitted to the ADF (Ibid).

¹⁴²² Hanf, *Coexistence*, 225.

¹⁴²³ The convoluting and atomisation of the Sunni experience of the Lebanese Civil War is perhaps best expressed by Johnson, *Class and Client*. The community's war effort essentially became atomised, enclavist, reactionary and defensive, compromised of myriad atomised factions – often little more than local community defence forces – fighting under a host of ideological banners (see Chapter 7) against anyone who attacked them, including former allies such as the Shi'a *Amal* movement, the PRM and even politically and/or ideologically-opposed rival Sunni-Lebanese factions.

¹⁴²⁴ See chapter 7.

¹⁴²⁵ See below.

Sunnis in the anti-Assad uprising in Syria¹⁴²⁶, and the establishment and terroristic operations of numerous Sunni-Lebanese groups espousing sectarian Islamist ideological narratives¹⁴²⁷. While sporadic and organisationally isolated – and dwarfed in scale by the previous episodes – the insurrections share a causal and ideological consistency; born once again out of HSC-VSC breakdown, sparked by perceived transgressions against two common, interlinked *causes de jour* against a backdrop of socioeconomic malaise. Much like the 1958 and 1975-6 conflicts, the 2012-14 *Sunni Insurrections* were subdued not by comprehensive resolution of grievances, but by armed repression. Though violence has since receded in the face of a pervasive military ‘security program’, it remains to be seen if this wave of contention has truly run its course; or if it instead represents the mere opening rounds of greater violence to come.

6.4.1. *Status quo* interbellum:

The fifteen-year civil war that followed the *Two-Year War’s* non-resolution was eventually resolved by the 1989¹⁴²⁸ *Ta’if Accords*; a comprehensive overhauling - though ultimately retaining – of the HSC-VSC nexus¹⁴²⁹. While more dramatic than the post-1958 reforms, the *Ta’if Accords* restored Lebanon’s fragile *modus vivendi* through internal tweaks to the volatile HSC-VSC nexus, rather than by abolishing it:

6.4.1.1. *Lowest-common-denominator modus vivendi*:

As previously, the *modus vivendi* was restored primarily by resetting the HSC – this time through substantial adjustments to the confessional balance of power

¹⁴²⁶ An estimated 1,000-6,000 Lebanese-Sunnis are thought to have joined Syrian rebel groups; chiefly JAN, IS, and AaS. See: Gade, “Limiting violent spillover,” 10-11 (for the lower estimate); and, for the higher estimate, Lefèvre, *The sociopolitical undercurrent*, 8.

¹⁴²⁷ Notably shadowy salafi-jihadist groups like the *Brigade of Aisha*, the *Free Sunnis of Balbek*, and the *Ziyad al-Jarrah Battalion* (the Lebanese branch of the al-Qaeda-affiliated *Abdullah Azzam Brigades*) have all emerged to launch terroristic attacks against Shi’ite civilians and/or Hezbollah. See, respectively: Rabil, *Salafism in Lebanon*, 227; Cafarella, “Syrian jihadists,” 5; and Lister, *The Syrian Jihad*, 201.

¹⁴²⁸ Although hostilities did not actually end until a year later in October 1990: Maronite General Michel Aoun, who assumed the Prime Ministership in 1988 despite not being a Sunni, was alone in rejecting the accords and had to be militarily ejected from office by the *Syrian Arab Army* in cooperation with anti-Aoun Maronite militias. See: Tom Najem, *Lebanon: The Politics of a Penetrated Society* (Oxon: Routledge, 2012), 42-43.

¹⁴²⁹ Technically, the accords aspired to the gradual abolishing of confessional consociationalism (envisioning a brief transitional ‘Second Republic’ based on confessional consociationalism that would promptly reform into a non-confessional ‘Third Republic’). However, no timetable was established for this process and, at the time of writing, it has yet to be initiated and seems unlikely to be so in the foreseeable future. See: Traboulsi, *A History of Modern Lebanon*, 250.

(effectively abolishing Maronite hegemony; the chief cause of consensus breakdown during previous episodes). Specifically, executive powers were redistributed at the expense of the Maronite Presidency. Of greatest importance to the Sunni community was the transfer of most executive powers – including control of the LAF - from the President to the *Council of Ministers*¹⁴³⁰, which possessed an equal ratio of Muslim to Christian ministers and was chaired by the Sunni PM¹⁴³¹. Under this new system, the political agenda would be drafted by the PM rather than the President¹⁴³², while a two-thirds majority would be required to pass any legislation¹⁴³³. Moreover, the PM would no longer be appointed by the Maronite President, but through binding consultation with the *Chamber of Deputies*¹⁴³⁴ (also split equally between Muslims and Christians¹⁴³⁵). Additionally, the Maronite President, Sunni PM, and Shi'a Speaker of Parliament were each awarded *de facto* veto over each other (the *Troika* system), meaning no major decisions could be made without all three (who remained representatives of the needs, interests, and sentiments of their confessional communities¹⁴³⁶) agreeing¹⁴³⁷. These changes were well received by the Sunni-Lebanese community¹⁴³⁸, as they appeared to enshrine concrete checks against the Maronite community's prior ability and willingness to marginalise them. No longer could the President make unpopular decisions unchecked, nor defang the Sunni community by appointing weak PMs. Simultaneously, Council of Ministers control over the LAF would prevent the armed forces becoming a tool for entrenching Maronite hegemony or executing operations contrary to the will of the Sunni community (as it had against the PRM and domestic movement in the 1960s and 70s). Importantly, the post-war transition period was directly supervised by Syria, who effectively annexed Lebanon between 1990-2005 (the

¹⁴³⁰ Konstantinos Athanasiadis, "Re-Visioning 'Lebanon': Power-sharing during the postwar era (1990-2015)" PhD Diss., *University of Durham* (2016), 162.

¹⁴³¹ Najem, *Lebanon*, 61.

¹⁴³² Athanasiadis, "Re-Visioning 'Lebanon'", 163.

¹⁴³³ Joseph Bahout, "The unravelling of Lebanon's Taif Agreement: Limits of Sect-based Power Sharing," *Carnegie Endowment for International Peace* (2016), 10.

¹⁴³⁴ Rigby, "Lebanon," 176.

¹⁴³⁵ Robert G. Rabil, "Hezbollah, the Islamic Association and Lebanon's Confessional System: al-Infatih and Lebanonization," *The Levantine Review* 1(1) (Spring 2010), 51.

¹⁴³⁶ Salloukh et al, *The Politics of Sectarianism*, 23.

¹⁴³⁷ Bahout, "The unravelling," 10.

¹⁴³⁸ Athanasiadis, "Re-Visioning 'Lebanon'", 175.

so-called *Pax Syriana*) under the guise of the Ta'if Accords' provision that Syria act as "guardian" of Lebanon's post-war transition¹⁴³⁹.

As before, these amendments helped restore the Sunni VSC. This was aided by the presence of strong communal leadership in the person of two-times PM (1992-1998, 2000-2004) Rafiq al-Hariri; whose financial resources, international connections with the West and Gulf States, and good relations with several high-ranking Syrian officials¹⁴⁴⁰, gave him significant leverage in the Troika¹⁴⁴¹ and formidable personal and state largesse for alleviating Sunni socioeconomic deprivation (although this largesse was often inhibited from reaching the Sunni-majority north by Syrian machinations)¹⁴⁴². Hariri was credited with the Ta'if Accords' favourable position towards the Sunni community¹⁴⁴³, and with protecting the Sunni community from Syrian repression¹⁴⁴⁴. He thus became a symbol of Sunni communal 'pride' and 'respect'¹⁴⁴⁵. Indeed, so important was the person of Hariri to the HSC-VSC nexus that its breakdown began with his assassination in 2005 (see below).

The modus vivendi lasted – despite underlying tensions and resentments (see below) – until 2005. On one hand, this resulted from Hariri's strong leadership, who, despite frequent political clashes with the other Troika members, maintained his strength as a Sunni communal representative throughout most of the period¹⁴⁴⁶; as well as being a lucrative patron for alleviating the socioeconomic hardships of the Sunni menu people. Meanwhile, the Troika system promoted political gridlock which, though frustrating, prevented any upsetting of the

¹⁴³⁹ For an overview of the Ta'if Accords legal position on Syria's occupation, see: Joshua Slomich, "The Ta'if Accord: Legalizing the Syrian Occupation of Lebanon," *Suffolk Transnational Law Review* 22(2) (1999). For a good overview on the *Pax Syriana* in practice, see: Rola el-Husseini, *Pax Syriana: Elite Politics in Postwar Lebanon* (New York: Syracuse University Press, 2012).

¹⁴⁴⁰ El-Husseini, *Pax Syriana*, 19.

¹⁴⁴¹ T. Najem, "The Collapse and Reconstruction of Lebanon," *University of Durham, Centre for Middle Eastern and Islamic Studies*, Working Paper (1998), 28.

¹⁴⁴² Hannes Baumann, "Citizen Hariri and neoliberal politics in postwar Lebanon," PhD Diss., SOAS, 2012, 205-206. Further explored in chapter 7.

¹⁴⁴³ The Ta'if Accords were based largely on a white paper drawn up by Hariri, see: Nicholas Blanford, *Killing Mr Lebanon: The Assassination of Rafik Hariri and its impact on the Middle East* (London: I.B. Tauris, 2009), 36.

¹⁴⁴⁴ Rosen, *Aftermath*, 185.

¹⁴⁴⁵ El-Husseini, *Pax Syriana*, 93.

¹⁴⁴⁶ Syria increasingly co-opted President Lahoud and Speaker of Parliament Berri to attempt to restrain Hariri's power in this period (Baumann, "Citizen Hariri," 216), but Hariri's international contacts, financial largesse, and ability to implant his loyalist in important ministries and posts allowed him to retain his strength and influence (Athanasiadis, "Re-Visioning 'Lebanon'," 193-196; El-Husseini, *Pax Syriana*, 114-155; and Salloukh et al, *The Politics of Sectarianism*, 25).

communal equilibrium (particularly as Syria arbitrated all gridlocks¹⁴⁴⁷). This also prevented regional upheavals, such as the increasingly sectarianized 2003 Iraq war, from becoming *causes de jour* as, regardless of any polarisation in communal attitudes, the Troika system prevented any one community from dictating policy responses (and thus transgressing the HSC). Syria further prevented Iraq from becoming a *cause de jour* by opposing the US-led invasion (consonant with Sunni sentiments)¹⁴⁴⁸ and by facilitating the passage of aspiring Sunni-Lebanese jihadists to Iraq¹⁴⁴⁹, thus exporting agitating individuals to be the problem of Iraq and the US-led occupation forces, rather than confining them within Lebanon, where upon they might have agitated among the Sunni-Lebanese community or turned their guns against the Lebanese state and/or Syrian occupation.

Finally, the security dilemma was alleviated by the weakening of the Maronite community who – dethroned institutionally – entered the post-war period in disarray; its leadership decimated by attrition¹⁴⁵⁰, alienation¹⁴⁵¹, exile¹⁴⁵² and imprisonment¹⁴⁵³, and its organisations fragmented and repressed by the Syrian occupation forces¹⁴⁵⁴. Maronite leadership devolved largely to the Maronite Patriarch, who encouraged communal reconciliation and cooperation, in

¹⁴⁴⁷ Raymond Hinnebusch, “Pax-Syriana? The Origins, Causes and Consequences of Syria’s Role in Lebanon,” *Mediterranean Politics* 3(1) (Summer 1998), 151.

¹⁴⁴⁸ Baumann, “Citizen Hariri,” 214.

¹⁴⁴⁹ Lister, *The Syrian Jihad*, 31-51.

¹⁴⁵⁰ Camille Chamoun, Danny Chamoun, Pierre Gemayel, Bashir Gemayel and Suleiman Franjeh all died during the civil war. See: Sami E. Baroudi and Paul Tabar, “Spiritual Authority versus Secular Authority: Relations between the Maronite Church and the State in Postwar Lebanon: 1990–2005,” *Middle East Critique* 18(3) (2009), 198; and Athanasiadis, “Re-Visioning ‘Lebanon’”, 175.

¹⁴⁵¹ A 2001 study by Haddad revealed “striking [Maronite] hostility towards Maronite leaders. Wartime sectarian leaders such as Samir Geagea, Lebanese Forces commander, and General Aoun incur the blame for confounding the interests of their community with their own personal concerns, which led to the intra-Maronite war in 1990, and the decline of Maronite power.” See: Simon Haddad, “A Survey of Maronite Christian socio-political attitudes in postwar Lebanon,” *Islam and Christian-Muslim Relations* 12(4) (2001), 469.

¹⁴⁵² Prominent Maronite leaders Raymond Edde, Michel Aoun and Amine Gemayel all went into exile during or upon the end of the civil war. Athanasiadis, “Re-Visioning ‘Lebanon’”, 175.

¹⁴⁵³ Samir Geagea—the leader of the Lebanese Forces— became the only civil-war era warlord to face prosecution following the war. He was sentenced to life imprisonment for the murder of Danny Chamoun, in a move seen by many Maronites as an arbitrary Syrian move to repress the Maronite community. Baroudi and Taber, “Spiritual Authority,” 198.

¹⁴⁵⁴ The Katā’ib fragmented into pro- and anti-Syrian branches (Athanasiadis, “Re-Visioning ‘Lebanon’”, 173; and Robert G. Rabil, “The Maronites and Syrian withdrawal: From ‘Isolationists’ to ‘Traitors’?” *Middle East Policy* 3(3) (Sep., 2001), 31), while the Lebanese Force Party, National Liberal Party and Independent National Current were all proscribed and repressed (Farid al-Khazen, “Political Parties in Postwar Lebanon: Parties in Search of Partisans,” *Middle East Journal* 57(4) (Autumn 2003), 613).

departure from the traditional Maronite-hegemonic Lebanese Nationalism¹⁴⁵⁵. These developments appeared to present a new level playing field in which the Sunnis would no longer exist as a subjugated little brother to the Maronites.

Thus, between weakened communal rivals and strengthened Sunni executive powers, prospects for Sunni flourishing within the establishment ideology seemed more promising than ever.

6.4.1.2. *Status quo realism:*

Additionally, modus vivendi restoration was facilitated by the physical, moral, and ideological exhaustion of the Sunni community during the civil war. The Marxist ideological tendency had failed to deliver upon its stated goals¹⁴⁵⁶, while actively alienating itself through the arrogant, thuggish, and extravagant behaviour of many of its socialist-posing leaders¹⁴⁵⁷. Moreover, those Marxist movements that survived the war had done so by allowing themselves to be co-opted by the now hated Syrian regime – sacrificing their ideological credibility in the process¹⁴⁵⁸. A similar fate afflicted the various Islamist movements who emerged during the later civil war period (see chapter 7). The PRM alienated itself in a similar fashion¹⁴⁵⁹ and was, moreover, scapegoated by the Sunni zu‘amā’ (who regained some influence following the LNM-PRM’s disintegration¹⁴⁶⁰), who portrayed the PRM as self-serving; using Lebanon for its own political ends with no concern for the suffering it inflicted upon its hosts¹⁴⁶¹. Finally, the civil war proved the final death knell for Arab unity of purpose. Syria’s intervention to rescue the Maronite community from defeat by the *Joint Forces* shattered any veneer of Arab nationalist ideological purity among the al-Assad regime, while the behaviour of the occupying Syrian troops – who were widely accused of anti-Sunnism – destroyed almost all remaining Pan-Syrian sentiment among Lebanon’s Sunnis¹⁴⁶². Simultaneously, various Arab states had visibly used Lebanon as a

¹⁴⁵⁵ Markus Keller, “Between Patriarchs and Politicians: A Comparative Study of the Effects of Separatism on Religious Minority Rebellion Onset” Masters Diss., *University of Oslo* (2012), 72.

¹⁴⁵⁶ Chalcraft, *Popular Politics*, 385.

¹⁴⁵⁷ As’ad Abu Khalil, “Druze, Sunni and Shiite Political Leadership in Present-Day Lebanon,” *Arab Studies Quarterly* 7(4) (Fall 1985), 40. Explored in more detail in chapter 7.

¹⁴⁵⁸ See Chapter 7.

¹⁴⁵⁹ Ibid.

¹⁴⁶⁰ Ibid.

¹⁴⁶¹ Abu Khalil, “Druze, Sunni and Shiite,” 37; and Klot, “The Collapse,” 501.

¹⁴⁶² A telling poll recorded that, following the civil-war, only 3% of Lebanese Sunnis still advocated union with Syria. See: Gary C. Gambil, “Islamist Groups in Lebanon,” *Middle East Review of International Affairs* 11(4) (Dec., 2007), 44.

proxy arena for their own intra-Arab struggles; with different states backing rival opposition groups¹⁴⁶³. This contrasted bitterly with the fact that, when Israel invaded in 1982, no Arab state came to Lebanon's rescue¹⁴⁶⁴. This ideological exhaustion helped engender a Sunni reorientation towards Lebanese Nationalism, and a willingness to strive towards a better future within the confines of the Lebanese state and establishment ideology¹⁴⁶⁵.

6.4.1.3. *Underlying environment permissive for IV:*

The post-war period did not remedy pre-war vertical relative deprivation, and, in fact, wealth disparities increased¹⁴⁶⁶. Moreover, these broadening disparities resulted chiefly from Hariri's neoliberal economic policies. Hariri focussed development on Beirut's city centre, largely neglecting the peripheries¹⁴⁶⁷ (Syria meanwhile prevented him from extending his patronage to North Lebanon as a means of preventing his monopolisation of Sunni loyalties¹⁴⁶⁸). Meanwhile, he focussed development on infrastructure that benefitted the wealthy, while neglecting agriculture, industry, and human development¹⁴⁶⁹. Moreover, tax reforms strengthened the old regressive system that disproportionately affected the poor¹⁴⁷⁰. These disparities did provoke strikes and protests¹⁴⁷¹, but they did not challenge the HSC because the Troika system prevented relative deprivations from appearing to result from any one community monopolising power (or from any community being excluded from power), as had been the case previously. Similarly, the VSC held because daily-needs patronage continued to flow reliably – either from Hariri or, in the north, from rival zu'amā' (who, in

¹⁴⁶³ El-Khazen, *The Breakdown of the State*, 303.

¹⁴⁶⁴ Samir Kassir, *Being Arab* (London and New York: Verso, 2004), 8.

¹⁴⁶⁵ Ibid.

¹⁴⁶⁶ Costs of living rapidly increased while standards of living decreased (Blanford, *Killing Mr Lebanon*, 48; and Baumann, "Citizen Hariri," 154) and social protection decreased (In 1997, 60.4% of Lebanese residents were not covered by health insurance, see: Baumann, "Citizen Hariri," 161).

¹⁴⁶⁷ Nisreen Salti and Jad Chaaban, "The role of sectarianism in the allocation of public expenditure in postwar Lebanon," *International Journal of Middle East Studies* 42(2) (Nov., 2010), 643-644.

¹⁴⁶⁸ Gade, "Sunni Islamists in Tripoli," 53.

¹⁴⁶⁹ Guilain Denoeux and Robert Springborg, "Hariri's Lebanon: Singapore of the Middle East or Sanaa of the Levant", *Middle East Policy* 6(2) (Oct., 1998), 160; Kathrin Höckel, "Beyond Beirut: Why Reconstruction in Lebanon did not contribute to State-Making and Stability," Occasional Paper 4, *London School of Economics and Political Science*, Crisis States Research Centre (July 2007), 5-9; and Michael C. Hudson, "Lebanon after Ta'if: Another Reform Opportunity Lost?" *Arab Studies Quarterly* 21(1) (Winter 1999), 36.

¹⁴⁷⁰ Baumann, "Citizen Hariri," 159.

¹⁴⁷¹ Rigby, "Lebanon," 178.

addition to their personal fortunes, accessed political office – and thus largesse (albeit limited¹⁴⁷²) – through co-optation by Syrian officials¹⁴⁷³) and formidable Islamist charity networks (see chapter 7).

Similarly, despite the war's destruction and Hariri's redevelopment projects, Maronite regions remained significantly wealthier than Muslim ones¹⁴⁷⁴. However, these disparities were not politicised like they had been during the days of Maronite hegemony. Instead, awareness shifted to the post-war distributions of state largesse. While Hariri developed Beirut, Syria largely prevented him from extending his patronage to the Sunni-majority North, which became the sole region whereby no local za'im was endowed with control over a major state patronage institution¹⁴⁷⁵. As such, while the Shi'a-majority south was equally destitute, Hezbollah's substantial largesse (its expansive international business enterprises¹⁴⁷⁶ and lucrative Iranian benefactor¹⁴⁷⁷) and Amal's control over the *Council of the South* state largesse organ¹⁴⁷⁸ meant that the Shi'a heartlands received far greater patronage than the Sunni heartlands¹⁴⁷⁹. It is telling that relative deprivation vis-à-vis the Shi'a community was politicised rather than the starker relative deprivation vis-à-vis the Maronite community. Sunni anxiety during this period was mounting over the Shi'a community's growing political clout, perceived as resulting from preferential treatment by Syria¹⁴⁸⁰. This suggests a conflation between perceived political hegemony and perceived relative deprivation.

Finally, under the Pax Syriaana, Lebanon experienced unprecedented levels of repression, both from the Syrian occupying forces and the Lebanese

¹⁴⁷² See below.

¹⁴⁷³ Gade, "Sunni Islamists," 35.

¹⁴⁷⁴ Nupur Kukrety and Sarah al-Jamal, "Poverty, Inequality and Social Protection in Lebanon," Report by the Issam Fares Institute for Public Policy and International Affairs, *American University of Beirut* (Apr., 2016), 7; Salti and Chaaban, "The role of sectarianism," 643; and Athanasiadis, "Re-Visioning 'Lebanon'," 294.

¹⁴⁷⁵ While those za'im in Syria's good graces could extract largesse from political office, they did not hold control over major largesse institutions as Hariri did in Beirut (controlling the *Council for Development and Reconstruction*) or Shi'a Hezbollah/Amal did in the south (the latter controlling the *Council of the South* reconstruction/development aid institution): Gade, "Sunni Islamists," 53.

¹⁴⁷⁶ Gambill, "Islamist Groups".

¹⁴⁷⁷ Omar Bortolazzi, "Hezbollah: Between Islam and Political Society Popular Mobilization and Social Entrepreneurship in Lebanon," *American University in Cairo* (2011), 31.

¹⁴⁷⁸ Shawn Teresa Flanigan and Mounah Abdel-Samad, "Hezbollah's Social Jihad: Nonprofits as Resistance Organizations," *Middle East Policy Council* 16(2) (Summer 2009).

¹⁴⁷⁹ This resulted, by 2009, in the traditionally destitute but now Hezbollah-administered self-becoming significantly wealthier than the North, constituting just 22% of Lebanon's poverty, as compared to North Lebanon's 53%. See: Alami, "The Impact of the Syria Conflict".

¹⁴⁸⁰ See below.

security forces under President Lahoud (r. 1998-2007)¹⁴⁸¹ and even Hariri¹⁴⁸². While repression produced HSC breakdown in the 1970s, and would again in 2012-2014, during this period it did not as it did not upset the confessional equilibrium. Though many Sunnis did perceive Syrian occupying forces to be pursuing an anti-Sunni policy to the benefit of the Shi'a community (see below), repression did not target a single community (the Maronites being more harshly affected than the Sunnis¹⁴⁸³). Moreover, despite beliefs that the Shi'a community was receiving preferential treatment, repression did not emanate from or explicitly benefit any one confessional group (particularly given Hariri was behind many repressive measures, while simultaneously being applauded for alleviating Syrian repression of the Sunni community¹⁴⁸⁴), nor was repression utilised against a *cause de jour*, as it had been in the 1950s and 1970s.

6.4.1.4. *Marginal presence of ideologies/movements:*

During this period, Lebanon witnessed numerous brief, isolated IV episodes perpetrated by salafi-jihadist movements. However, these groups comprised primarily non-Lebanese members (generally situated in Palestinian refugee camps)¹⁴⁸⁵, while those that did comprise significant numbers of Lebanese were concerned with non-Lebanese issues (aiding Sunni insurgencies in Bosnia, Iraq, Palestine, etc.) and did not intentionally turn their guns against the Lebanese establishment¹⁴⁸⁶. Moreover, they lacked popular support to the extent that, when

¹⁴⁸¹ El-Husseini, *Pax Syriana*, 135.

¹⁴⁸² Baumann, "Citizen Hariri," 172-173.

¹⁴⁸³ Rabil, "The Maronites".

¹⁴⁸⁴ See footnote 1572 above.

¹⁴⁸⁵ For example, *Fatah al-Islam* – which resided in the Nahr al-Bared Palestinian refugee camp, was led by non-Lebanese jihadists, and constituted of 69 Lebanese, 50 Palestinians out of which 43 were from Syria, 43 Saudis, one Tunisian, one Algerian, one Yemeni and one Iraqi (Ana Maria Luca, "Sectarian Conflict and Sunni Islamic radicalization in Tripoli, Lebanon," Masters Diss., *Lebanese American University*, 2015, 50); while *Usbat al-Ansar* – residing in Sidon's Ain al-Hilweh Palestinian refugee camp – comprises an almost entirely Palestinian membership (Pall, *Lebanese Salafis*, 48). For an in-depth account of the development of Salafi-jihadism in Lebanese-Palestinian refugee camps, see: Bernard Rougier, *Everyday Jihad: the rise of militant Islam among Palestinians in Lebanon* (Cambridge, MA: Harvard University Press, 2008).

¹⁴⁸⁶ For example, in 2000 the LAF clashed with *Takfir wa al-Hijra* – a Lebanese salafi-jihadist group using Lebanon as a training ground prior to travelling to fight the Russians in Chechnya (Rougier, *Everyday Jihad*, 242). Similarly, *Fatah al-Islam's* animus was towards the West and Israel (shaped by the Iraq war) and, while denouncing Iraqi Shi'as as 'collaborators' (with the West), it made a point of distinguishing them from Lebanese Shi'as who were 'resisters' (against Israel) (Rougier, *The Sunni Tragedy*, 151). It sought to use Lebanon as a base to fight Israel in Palestine and US-led occupying forces in Iraq (Rabil, *Salafism in Lebanon*, 201) and its clash with the LAF appears to have been unplanned, escalating following an attempted bank robbery that provoked a crack-down by the Lebanese authorities (ibid, 203-204).

one of these groups – *Fatah al-Islam* – became reluctantly embroiled in a battle with the LAF in 2007, most Lebanese Sunnis virulently opposed them, with hundreds volunteering to help the LAF defeat the group¹⁴⁸⁷.

6.4.2. Consensus breakdown:

Much like the *Two-Year War*, the *Sunni Insurrections* were set in motion by two increasingly-intertwined *causes de jour* that strained the HSC-VSC nexus: 1) Hezbollah transgressions against the post-Ta'if HSC; and 2) communal polarisation over the al-Assad regime, both prior to and in light of the Syrian civil war (commencing 2011):

As noted, the Sunni community greeted their empowerment by the Ta'if Accords (and attendant demise of Maronite hegemony), foreseeing for the first time a future in which they would no longer play the role of a subjugated, subordinate community in the country. Thus, any threat to this ascendance would, in J-Curve fashion, make the community bristle, while also creating a new security dilemma to replace the diminished Sunni-Maronite one.

Polarisation over the al-Assad regime began in 2005 and escalated in 2011, but its roots run deep. Though the Syrian occupation was a stabilising force in the post-Ta'if years (in terms of HSC maintenance), it also garnered Sunni resentment. Firstly, many Sunnis – particularly in the north – suffered immensely under Syria's wartime occupation, many accusing the al-Assad regime of persecuting Sunnis while elevating Shi'as and Alawites¹⁴⁸⁸. Meanwhile, during the *Pax Syriana*, Syria inhibited the Sunni community's flourishing, promised by Ta'if, by systematically atomising and co-opting Sunni political representation through divide-and-rule¹⁴⁸⁹. Finally, triggering the consensus crisis, in 2005 Hariri, the one Sunni able to check Syrian machinations, was assassinated, and Syria - with potential Hezbollah collaboration – was assumed complicit. The resulting outrage manifested in a massive protest movement – the *Freedom Intifada* – that successfully forced Syria's ejection from the country. However, the Sunni community's ability to finally enjoy the promises of Ta'if unhindered would now depend on Hezbollah, who became more assertive upon losing the direct support

¹⁴⁸⁷ Rosen, *Aftermath*, 214.

¹⁴⁸⁸ For detailed and vivid accounts, see: Gade, "Sunni Islamists,"; and Rougier, *The Sunni Tragedy*. See also: International Crisis Group, "Lebanon's Politics," 6.

¹⁴⁸⁹ Taku Osoegawa, *Syria and Lebanon: International Relations and Diplomacy in the Middle East* (London and New York: I.B. Tauris, 2015), 109.

of their Syrian ally¹⁴⁹⁰, while continuing support for Syria by Hezbollah would appear, in Sunni eyes, as tantamount to endorsing the oppression of Sunnis – thus signalling ill-will and enflaming the Sunni-Shi‘a security dilemma.

Both issues would become magnified by the 2011 outbreak of civil war in Syria: Because the Sunnis supported the revolutionaries, while the Shi‘as supported the regime, Lebanon was faced with a consensus crisis akin to the Arab Cold War of the 1950s, and would need to tread a careful path to avoid a consensus breakdown:

6.4.2.1. *HSC breakdown:*

As noted, while the Sunni-elevating HSC promised by Ta‘if was not realised under Syria’s tutelage, an acceptable HSC was at least maintained by the Troika system, Syrian mediation, and, above all, by the strength and influence exhibited by Rafiq al-Hariri. However, following Hariri’s death and the end of the *Pax Syriana*, this HSC became threatened as Hezbollah – denied the protection traditionally offered by Syria – began asserting itself in Lebanese politics.

This began immediately following Hariri’s assassination. Not only was Hezbollah implicated in the assassination but, confronting the Freedom Intifada, the group rallied Shi‘a (and some Maronite) popular opinion in defence of the Syrian occupation. These parallel protest movements calcified after the Syrian withdrawal in semi-institutionalised, overtly-antagonistic political blocs: the anti-Syrian, Sunni-led *March 14th Bloc*, and the pro-Syrian, Shi‘a-led *March 8th Bloc* (named after respective days of protest and counter-protest during the Freedom Intifada¹⁴⁹¹). The two blocs commenced what Yahya calls a “vetocracy”: vetoing each other in all government decisions – however trivial – on principle, bringing government to a standstill (afflicting already inadequate service provision and social security for the menu people)¹⁴⁹² and obstructing the Sunni elevation promised by Ta‘if.

Then, in 2006, Hezbollah provoked a destructive war with Israel which, though initially applauded across confessional divides by the menu people¹⁴⁹³,

¹⁴⁹⁰ Najem, *Lebanon*, 75.

¹⁴⁹¹ *Ibid*, xv.

¹⁴⁹² Maha Yahya, “Taking Out the Trash: Lebanon’s Garbage Politics,” *Carnegie Endowment for International Peace*, dated August 25 2015. Accessed August 22 2016. Available at: <https://carnegie-mec.org/diwan/61102>

¹⁴⁹³ Opinion polls taken during the 2006 Israeli-Hezbollah war found that 89% of Sunnis supported Hezbollah’s actions. See: El-Husseini, *Pax Syriana*, 73.

was recast as a transgression against Lebanese sovereignty by the Sunni zu‘amā¹⁴⁹⁴, who adopted a rhetoric very similar to that of the Maronite zu‘amā’ in the 1970s towards the PRM. Tensions further increased as Hezbollah retaliated against efforts by Sunni PM Siniora to establish a Tribunal for bringing to justice the killers of al-Hariri, which Hezbollah claimed was an attempt to promote a US agenda and discredit Hezbollah¹⁴⁹⁵.

Like the Maronites in previous episodes, Hezbollah worked through the system to obstruct and weaken Sunni political representation through constitutional means; repeatedly collapsing governments by resigning its ministers and that of its allies in 2006¹⁴⁹⁶ and 2011¹⁴⁹⁷ respectively. When constitutional means proved ineffective, Hezbollah proved willing and able to resort to extra-constitutional means to impose its will (a move reminiscent of, though dwarfing in scale, the Maronite Kataeb in the 1970s). In 2007, it launched an occupation movement outside the Prime Ministerial Palace which ended only when civil-war threatened¹⁴⁹⁸. In May 2008, Hezbollah transgressed all bounds by deploying its armed forces against another Lebanese community, occupying Sunni West Beirut after sweeping aside the feeble “security companies” raised by *al-Mustaqbal* (the political party established to politically unite and coordinate the Sunni community following Hariri’s assassination)¹⁴⁹⁹, which was followed by the *Doha Agreement* which appeared to reward Hezbollah’s transgressions: awarding them *de facto* veto in government¹⁵⁰⁰. These extra-constitutional actions enflamed the Sunni-Shi‘a security dilemma (Lebanese Sunnis began demanding weapons from al-Mustaqbal in 2007¹⁵⁰¹), as well as demonstrating the Sunni community’s continued vulnerability and subjugation despite the promises of Ta‘if – provoking a J-Curve response.

¹⁴⁹⁴ International Crisis Group, “Lebanon’s Politics,” 10.

¹⁴⁹⁵ Athanasiadis, “Re-Visioning ‘Lebanon’,” 250.

¹⁴⁹⁶ For a detailed overview of this political crisis, see: Karim Knio, “Is Political Stability Sustainable in Post-‘Cedar Revolution’ Lebanon?,” *Mediterranean Politics* 13(4) (2008): pp. 445-451; and Haddad, “Lebanon”.

¹⁴⁹⁷ For a detailed overview, see: Athanasiadis, “Re-Visioning ‘Lebanon’,” 264-266.

¹⁴⁹⁸ This followed its collapsing of the government in 2006, which had failed to achieve its goal of blocking the establishment of a Tribunal to investigate the murder of Rafiq al-Hariri. See: Haddad, “Lebanon,” 408-409.

¹⁴⁹⁹ International Crisis Group, “Lebanon’s Politics,” 13.

¹⁵⁰⁰ Mona Alami, “Minding the Home Front: Hezbollah in Lebanon,” *The Washington Institute for Near East Policy* Research Note 21 (Aug., 2014). Available at: <https://www.washingtoninstitute.org/policy-analysis/minding-home-front-hezbollah-lebanon>, 9.

¹⁵⁰¹ Ibid. 13.

Finally, when the Syrian uprising broke out, Hezbollah again contravened Lebanese sovereignty by militarily intervening on behalf of al-Assad, despite the state's formal declaration of neutrality¹⁵⁰². Meanwhile the state itself became implicated, as the LAF came under accusations of confessional bias: while Hezbollah was allowed to cross the border to Syria unimpeded, the LAF arrested Sunni fighters attempting to do the same to back the rebels¹⁵⁰³. This led to a repeat of 1970s accusations that the LAF repressed its own citizens but failed to defend its borders (from Israel or Syria)¹⁵⁰⁴. Worse still, it was accused of serving an anti-Sunni agenda dictated by Hezbollah, and even of being actively infiltrated by the group¹⁵⁰⁵.

6.4.2.2. VSC breakdown:

As noted, Rafiq al-Hariri was succeeded by *al-Mustaqbal* – a movement led, at times officially and always spiritually, by Hariri's son, Saad al-Hariri¹⁵⁰⁶ - as *de facto* leadership for the Sunni community. While *al-Mustaqbal* enjoyed greater operational freedom than Rafiq al-Hariri had (due to Syria's exit) – notably extending to the Sunni-majority north for the first time - it simultaneously lacked his influence, gravitas, resources, and successes:

Firstly, the enhanced Sunni institutional power promised by Ta'if proved impotent against Hezbollah's spoiling tactics, with government gridlock imposed by the above-noted 'vetocracy' preventing *al-Mustaqbal* from pushing through its agenda constitutionally. Meanwhile, its failure to defend West Beirut against Hezbollah's 2008 military coup (coupled with the failure of its Western allies to

¹⁵⁰² Lina Khatib, "Regional Spillover: Lebanon and the Syrian Conflict," *Carnegie Endowment for International Peace* (Jun., 2014).

¹⁵⁰³ Gade, "Lebanon," 9.

¹⁵⁰⁴ These accusations grew in volume when the LAF failed to take actions when Syrian cross-border raids against Syrian rebels sheltering in Lebanon inflicted casualties against Lebanese civilians and damage to Lebanese property, see: Luca, "Sectarian Conflict," 61.

¹⁵⁰⁵ Salloukh et al, *The Politics of Sectarianism*, 133; and Erwin Van Veen, "Elites, power and security: How the organization of security in Lebanon serves elite interests," CRU Report, *Clingendael, Netherlands Institute for International Relations* (May 2015). 17.

¹⁵⁰⁶ While always the figurehead of *al-Mustaqbal*, Saad al-Hariri led officially (in capacity of PM) between November 2009 and June 2011. He has since reprised the position (in the post-case-study period) between December 2016 and January 2020, and again from October 2020 the present. See, respectively, Najem, *Lebanon*, 81; Ben Hubbard and Hwaida Saad, "Lebanon, mired in crises, turns to a professor as Prime Minister," *The New York Times*, dated December 19 2019. Accessed January 12 2021. Available at: <https://www.nytimes.com/2019/12/19/world/middleeast/lebanon-prime-minister-hassan-diab.html>; and Martin Chulov, "Saad Hariri returns as Lebanon PM a year after resigning," *The Guardian*, dated October 22 2020. Accessed January 12 2021. Available at: <https://www.theguardian.com/world/2020/oct/22/saad-hariri-returns-lebanon-pm-year-after-resigning>

come to its aid) showed the impotence of al-Mustaqbal's extra-institutional capabilities to represent and protect the Sunni menu people, alongside the vacuousness of its Western alliances. Similarly, Hezbollah's 2006 and 2011 'constitutional coups' revealed how vulnerable the office of PM remained despite Ta'if. This prompted many Sunnis to begin to look elsewhere for capable and assertive protectors.

Additionally, in part due to al-Mustaqbal's impotence vis-à-vis Hezbollah, the party has suffered a substantial decrease in its access to foreign largesse (Saudi Arabia reducing its patronage following its disappointment over al-Mustaqbal's handling of the 2008 coup¹⁵⁰⁷), resulting in a sharp decline in the already dire socioeconomic circumstances of the Sunni menu people¹⁵⁰⁸. This has, again, driven the menu people to look elsewhere for socioeconomic support.

Finally, echoing the lead up to the *Two-Year War*, the Sunni political elite has alienated its constituents, failing to defend and assert the menu people's interests and, at times, actively opposing them. Between January 2011 and March 2013, the Sunnis suffered a pro-March 8th PM – Najib Mikati – and a majority March 8th 'unity' cabinet¹⁵⁰⁹. Mikati held close relations with al-Assad and repeatedly appeared to betray the Sunni cause; abstaining from Arab League condemnations of the al-Assad regime, refusing the legitimacy of the rebel *Syrian National Council*, and neglecting to hold Syria accountable for incursions into Lebanese territory that caused loss of life and property¹⁵¹⁰. Though Mikati was succeeded by Sa'ad al-Hariri, renewed Sunni hopes were dashed when al-Hariri again seemed to default on his duties towards the Sunni community, leading a government that cracked down on Sunni IV¹⁵¹¹ while failing to confront Hezbollah transgressions. Less kinetically, in another parallel to 1975, many socioeconomically-marginalised Sunnis voiced frustration that their elites were not only failing to protect them but, worse still, appeared to be active perpetrators of their suffering – keeping them impoverished to keep them dependent/obedient¹⁵¹².

¹⁵⁰⁷ Rabil, *Salafism in Lebanon*, 205.

¹⁵⁰⁸ Rougier, *The Sunni Tragedy*, 220.

¹⁵⁰⁹ Osoegawa, *Syria and Lebanon*, 176.

¹⁵¹⁰ *Ibid*, 177.

¹⁵¹¹ See below.

¹⁵¹² Nour Samaha, "Lebanon's Sunnis search for a saviour," *al Jazeera*, dated June 15 2013, accessed November 8 2014. Available at: <https://www.aljazeera.com/features/2013/6/15/lebanons-sunnis-search-for-a-saviour>; Rougier, *The Sunni Tragedy*, 23.

6.4.3. Ideological competition:

Once again, grievance/alienation was not sufficient to promote sustained anti-establishment revolt. An ideological movement was required capable of providing alternative leadership, resources, organisational capabilities, and an ideological vision articulating a viable alternative to the *status quo*, alongside viable means for achieving it. This was found in the militant Islamist ideological tendency¹⁵¹³ rejuvenated by the conflict in neighbouring Syria. This movement comprised both Lebanese groups (chiefly localised, small-scale 'local defence forces' led by Sheikhs or Qabadayat espousing various shades of militant Islamist (usually Salafi) ideology) and foreign groups (notably JaN and IS, both of whom attempted to reach out to Lebanese Sunnis and establish cells among the community¹⁵¹⁴). As before, we should not become too hung up on ideological specifics. What was most important was the ability of such groups to provide:

- 1) Diagnostic frames attributing the community's woes to a sectarian Shi'a-Alawite conspiracy; an inept, complicit Sunni political elite corrupted and weakened by secularism and material interests and, above all, a broader Sunni malaise resulting from a failure to uphold God's straight path¹⁵¹⁵.
- 2) A basic prognosis based on defending the community against these sectarian threats and restoring Sunni honour and collective wellbeing by returning to God's straight path (with an advanced prognosis based on the simple, firmly-prescriptive Salafi methodology)¹⁵¹⁶.
- 3) Empowering strategic frames citing genuine, recent precedents for achieving success. Chiefly, this involved a search for a Sunni

¹⁵¹³ All listed and evidenced in Appendix B

¹⁵¹⁴ JaN established a Lebanese chapter in 2013, while IS appointed an 'Emir' for Lebanon in mid-2014. See: Marc Andre Siegrist, "Lebanon – Can the Islamic State Set the Cedar Country Aflame?" *Counter Terrorist Trends and Analyses* 7(2) (Mar., 2015), 15; Raphaël Lefèvre, "How the War in Syria Empowers Lebanese Jihadism," *Carnegie Endowment for International Peace*, dated January 29 2014. Accessed November 3 2016. Available at: <https://carnegie-mec.org/diwan/54353>; Nicholas Blanford, "Is al Qaeda about to expand the 'field of jihad' to Lebanon?" *Christian Science Monitor*, dated February 17 2014. Accessed November 12 2014. Available at: <https://www.csmonitor.com/World/Middle-East/2014/0217/Is-Al-Qaeda-about-to-expand-the-field-of-jihad-to-Lebanon>. Both groups have attempted to appeal to Lebanese Sunnis, presenting themselves as defenders against/liberators from Hezbollah. See: Zelin, "Jihadism in Lebanon," 58; Cafarella, "Syrian Jihadists signal intent", 4; Khatib, "The Political and Security Fallout".

¹⁵¹⁵ Discussed in detail in chapter 7 and Appendix B.

¹⁵¹⁶ Ibid.

equivalent to Hezbollah that might check and outperform the Shi'a movement, a blueprint for which they saw in JaN and IS. This seems to have been more important than the prognostic framings given the apparently variable, often lukewarm adherence of Sunni Lebanese to Salafism¹⁵¹⁷.

- 4) Prototypical leadership from leaders demonstrating their love for and devotion to the Sunni menu people through provision of essential every-day services (in contrast to the inept or even complicit political elite), and their either living among the people (in the case of indigenous Salafi sheikhs and Qabadayat) or heroic defence of the Sunni ummah (primarily in the case of JaN and IS, etc., but also in the case of many militant indigenous Sheikhs and Qabadayat)¹⁵¹⁸.
- 5) Material provisions to ween them (menu people and Qabadayat) off dependence on zu'amā' patronage¹⁵¹⁹.
- 6) An opportunity to burnish Sunni-Lebanese 'pride' and 'respect' by embracing a religiously-upright and militarily stalwart identity no longer subjugated and humiliated by socioeconomic malaise, corrupt/weak leaders, and unanswered internal and external transgressions.

The impact of these movements was, again, substantial. Prior to their popularisation, the Sunnis could only implore fatalistically on al-Mustaqbal to protect them against Hezbollah predations and promote Sunni interests and sentiments. The popularisation of these movements both freed the menu people from this dependence and provided means and vision for opposing them. Moreover, they gave the Sunnis – defanged under al-Mustaqbal's military ineptitude – the confidence, organisation, and resources to stand up for themselves against Hezbollah, the LAF, unrepresentative elites, etc.

Conversely, the ability of these movements to popularise and assume leadership was made possible by the VSC collapse: for reasons discussed more in the following chapter, the collapse of the VSC 1) forced many Sunnis to reconsider their previous antipathy towards Islamist movements/personalities; 2) forced al-Mustaqbal to elevate such groups by entering tacit alliances-of-

¹⁵¹⁷ Ibid.

¹⁵¹⁸ Ibid.

¹⁵¹⁹ Ibid.

convenience with them; and 3) growing resentment towards al-Mustaqbal promoted sympathy for armed Islamists who not only appeared more able and willing to stand up for the Sunni men and women but were targeted by al-Mustaqbal at the very time the latter were giving tacit carte blanche to Hezbollah. Finally, the collapse of al-Mustaqbal's patronage networks forced many Sunnis to rely on charities linked to militant Islamist Sheikhs and Qadafi, enabling the latter to entrench themselves positively within Sunni society.

6.4.4. Outbreak of conflict and 'conflict resolution':

Due to the sporadic, isolated nature of the insurrections – and because the handling of each outbreak of violence tended to feed into the next – it is helpful to present both conflict outbreak and conflict resolution in conjunction. From March 2012 to October 2014 there occurred at least nineteen instances of intra-Lebanese violence in Tripoli, West Beirut, and Sidon¹⁵²⁰. Alignments varied, typically pitting anti-Syrian, anti-Hezbollah, Sunni gunmen (usually Islamist to at least some degree¹⁵²¹) against either:

- Pro-Syrian Sunni factions, Islamist and secular: (e.g., Beirut: March 2012¹⁵²², May 2012¹⁵²³, October 2012¹⁵²⁴, March 2014¹⁵²⁵; and Tripoli: August 2012¹⁵²⁶).

¹⁵²⁰ Figure arrived at through a survey of news reportage between this period.

¹⁵²¹ For a particularly nuanced discussion on the ideological orientations of Sunni gunmen during the 2012-2014 insurrections, see: Lefèvre, "The Sociopolitical Undercurrent". For my own detailed analysis, see Chapter 6.

¹⁵²² Mordechai Nisan, *Politics and War in Lebanon: Unravelling the Enigma* (London: Routledge, 2017), 203.

¹⁵²³ Alice Fordham, "Beirut tense after violent clashes linked to Syrian unrest," *The Washington Post*, dated May 21 2012. Accessed November 12 2014. Available at: https://www.washingtonpost.com/world/middle_east/beirut-tense-after-violent-clashes-linked-to-syrian-unrest/2012/05/21/gIQAgQG0fU_story.html?utm_term=.14117ca092b3

¹⁵²⁴ Dominic Evans and Angus MacSwan, "Gunmen, soldiers fight in Lebanon in spillover from Syria," *Reuters*, dated October 22 2012. Accessed November 12 2014. Available at: <https://uk.reuters.com/article/us-lebanon-crisis-idUKBRE89L0CK20121022>

¹⁵²⁵ "One Killed in Clashes between Shaker al-Berjawi Supporters, Salafists near Beirut's Sports City", *Naharnet*, dated March 23 2014. Accessed November 14 2014. Available at: <http://www.naharnet.com/stories/en/123548>

¹⁵²⁶ Luca, "Sectarian Conflict," 80 & 91.

- Alawite militiamen in Tripoli's Jebel Mohsen neighbourhood: (e.g., Tripoli: February 2012¹⁵²⁷, May 2012¹⁵²⁸, June 2012¹⁵²⁹, August 2012¹⁵³⁰, October 2012¹⁵³¹, December 2012¹⁵³², May 2013¹⁵³³, November 2013¹⁵³⁴, December 2013¹⁵³⁵, and March 2014¹⁵³⁶).
- Fighters of the pro-Syrian SSNP: (e.g., Tripoli: June 2013¹⁵³⁷).
- Hezbollah: (e.g., Sidon: summer 2012¹⁵³⁸ and June 2013¹⁵³⁹).
- And/or the LAF: e.g. (Sidon: June 2013¹⁵⁴⁰; and Tripoli: October 2014¹⁵⁴¹).

Similarly, they typically occurred in response to several recurring provocations:

- "Spill-over" violence from the Syrian conflict between pro- and anti-regime Lebanese factions¹⁵⁴².
- Perceived LAF double standards in their treatment of pro- and anti-Syrian regime militants¹⁵⁴³.
- Perceived anti-Sunni prejudice and arrests by the LAF¹⁵⁴⁴.

¹⁵²⁷ "Clashes in Tripoli, Lebanon, over Syria unrest," *BBC News*, dated February 11 2012. Accessed November 14 2014. Available at: <http://www.bbc.co.uk/news/world-middle-east-16997656>

¹⁵²⁸ Luca, "Sectarian Conflict," 76.

¹⁵²⁹ Nazih Siddiq, "Lebanese army deploys in Tripoli after 15 killed," *Reuters*, dated June 3 2012. Accessed November 14 2014. Available at: <https://www.reuters.com/article/us-lebanon-tripoli-idUSBRE85203D20120603>

¹⁵³⁰ Mary Casey-Baker and Jennifer Parker, "Clashes sparked by Syria conflict continue in Lebanon," *Foreign Policy*, dated August 22 2012. Accessed November 14 2014. Available at: <http://foreignpolicy.com/2012/08/22/clashes-sparked-by-syria-conflict-continue-in-lebanon/>

¹⁵³¹ Omri Nir, "The Sunni-Shi'a balance in Lebanon in light of the war in Syria and regional changes," *Middle East Review of International Affairs* 18(1) (Spring 2014), 65.

¹⁵³² Josh Wood, "Sectarian Conflict Kills at Least 17 in Northern Lebanon in Spillover of Syrian Civil War," *The New York Times*, dated December 9 2012. Accessed November 14 2014. Available at: <https://www.nytimes.com/2012/12/10/world/middleeast/syria-conflict-spills-over-to-northern-lebanon.html>

¹⁵³³ "At Least 10 Dead in Tripoli Clashes as Heavy Weapons Used for 1st Time," *Naharnet*, dated May 23 2013. Accessed November 14 2014. Available at: <http://www.naharnet.com/stories/en/84135>

¹⁵³⁴ Nazih Siddiq, "Six killed in clashes in Lebanon's Tripoli," *Reuters*, dated November 30 2013. Accessed November 14 2014. Available at: <https://www.reuters.com/article/us-lebanon-tripoli/six-killed-in-clashes-in-lebanons-tripoli-idUSBRE9AT03K20131130>

¹⁵³⁵ Oliver Holmes and Laila Bassam, "Militias battle anew in Lebanon's Tripoli, army arrests 21 fighters", *Reuters*, dated December 3 2013. Accessed November 14 2014. Available at: <https://www.reuters.com/article/us-syria-crisis-lebanon-clashes-idUSBRE9B20T620131203>

¹⁵³⁶ Nisan, *Politics and War*, 202.

¹⁵³⁷ *Ibid*, 202.

¹⁵³⁸ Zelin, "Jihadism in Lebanon," 52-53.

¹⁵³⁹ *Ibid*, 53.

¹⁵⁴⁰ *Ibid*, 53.

¹⁵⁴¹ Rougier, *The Sunni Tragedy*, 223.

¹⁵⁴² The majority of Tripoli and Beirut clashes.

¹⁵⁴³ The Saida clashes, several of the Tripoli clashes.

¹⁵⁴⁴ E.g., the Tripoli October 2014 clashes; Rougier, *The Sunni Tragedy*, 223.

- In the case of October 2012 clashes, the assassination of a high-ranking Sunni-Lebanese official – ISF Intelligence Chief Wissam Hassan – for which Hezbollah and the Syrian regime were assumed complicit¹⁵⁴⁵.

In each case, peace was restored through LAF military intervention. This culminated in the 2014 LAF “security plan” imposed over Sunni-majority Tripoli¹⁵⁴⁶; where most of the heaviest fighting has occurred. The security plan was augmented by several military offensives by the LAF against Islamist factions in Sidon and Tripoli, coupled with sweeping arrests of suspected militants¹⁵⁴⁷. The result was a significant drop in violence. Far from resolving the grievances and consensus breakdown that sparked the violence however, these measures have only enflamed them. Accusations of LAF anti-Sunni bias and double standards have been exacerbated by accusations of arbitrary arrests and torture of Sunnis on the most trivial grounds, while pro-Syrian militants are reportedly released and their weapons returned to them after brief detentions¹⁵⁴⁸. Meanwhile, al-Mustaqbal’s legitimacy further degraded under accusations of not doing enough to protect its constituents from these threats¹⁵⁴⁹.

It remains too early to tell if the conflict has been nipped in the bud, or if this repression will only stoke further outbreaks. According to my model, conflict will remain likely for as long as Hezbollah continues to transgress against Sunni *causes de jour*, something they show no signs of abating. It also remains to be seen if Salafi-jihadism, embodied by the like of IS and JaN, will continue to be considered viable vehicles/models for change by Sunni-Lebanese militants, or if their military devastation and moral discrediting will see them consigned to the dustbin of history, alongside the Pan-Arab Nationalism of the radical Arab states in the 1960s, and the guerrilla warfare of the PRM/Marxist tendency in the 1970s¹⁵⁵⁰. Anecdotal evidence suggests this could already be occurring for the same reasons that previous ideologies/movements faded following the 1958 *Lebanese Crisis* and 1976-6 *Two-Year War*: a failure to deliver upon their stated

¹⁵⁴⁵ Nir, “The Sunni-Shi’a balance,” 65.

¹⁵⁴⁶ Gade, “Limiting violent spillover,” 4.

¹⁵⁴⁷ See above examples.

¹⁵⁴⁸ Luca, “Sectarian Conflict,” 91; Rougier, *The Sunni Tragedy*, 228.

¹⁵⁴⁹ Rabil, *Salafism*, 207.

¹⁵⁵⁰ See chapter 7.

objectives, and alienating behaviour that discredited their ideological credibility and heroic/noble image (as I discuss in the final chapter 7)¹⁵⁵¹.

6.5. Conclusion:

From this study – which has produced contextually-bounded, pre-generalisable explanations for the causation of three specific IV episodes – we can abstract a more general statement that we might test, substantiate, and refine through comparison with additional case-studies, eventually contributing to a new ‘third’ paradigm¹⁵⁵²:

Firstly, the findings suggest that extant grievances are *necessary* but *insufficient* for promoting IV. The kind of grievances often listed as root-causes in progressive paradigm literature (e.g., relative deprivation, horizontal inequalities, corruption, etc.) are insufficient to provoke rejection of the establishment ideology and IV against it (although such grievances become significant once the establishment ideology *is* rejected). While such grievances may provoke agitation, such agitation tend to be reactive and reformist - making remedial demands within the framework of the establishment ideology. What is required to promote *anti*-establishment agitation is a specific kind of grievance – a social contract breakdown. Such breakdowns convince the people that the establishment ideology is not only flawed but incapable of catering for their essential everyday needs, making a search for alternative vision, protection, provision, and leadership a point of emergency. Additionally, these breakdowns, I contend, function similarly to Gramscian *organic crises*¹⁵⁵³: prompting doubts over the viability, benevolence, and ostensible *raison d'être* of the establishment ideology (and of its representative elites) and opening the ideological ‘field’¹⁵⁵⁴ to previously shunned ideologies/movements to present alternative visions for organising state and society, and to present themselves as capable and benevolent agents for delivering that vision.

¹⁵⁵¹ In interviews with leading Tripolitanian clerics and community leaders, Lefèvre ascertained that many previous supporters of the likes of IS had come to see the group as self-serving, ‘criminal’ charlatans who employed Salafi rhetoric to serve their own interests (Lefèvre, *The sociopolitical undercurrent*, 17), while many of the most ardent Lebanese supporters of militant Islamist ideologies/movements – those who had travelled to fight in Syria – had returned deeply alienated both by the behaviour of the factions with whom they deserved and, more broadly, with the utter absurdity, futility and brutality of IV (Ibid, 9-10).

¹⁵⁵² Restated and embellished in the conclusion chapter.

¹⁵⁵³ See Chapter 2.

¹⁵⁵⁴ Once again, I conceptualise field in a broadly Bourdieusian sense (see Chapter 1).

These movements – now given a chance to popularise by the social contract breakdown – play a causal role that is also necessary but insufficient. They are necessary in that they make anti-establishment revolt appear feasible and give it direction, thus transforming contention from reactive/reformist demands made *within* the framework of the establishment ideology to proactive/revolutionary demands in pursuit of abolishing and replacing it. They are insufficient in that they do not motivate anti-establishment revolt *ex nihilo* (through *ideological persuasion*), but rather make such revolt appear feasible through *post facto rationalisation* and direct its specific objectives and methodologies. Thus, the study suggests that, in the causation of Sunni-perpetrated IV in Lebanon, social contract breakdowns form critical junctures: not themselves causing IV to occur, but rather making its occurrence possible if accompanied by other necessary but insufficient inputs (chiefly the presence and savvy of viable movements).

Finally, remedial solutions that do not address the causes of IV episodes (volatile/unsustainable social contracts) may briefly nip those episodes in the bud. However, they will likely only delay the next episode until the next – almost inevitable – contract breakdown. As a third foundational assumption issue, I discuss this further in the next chapter.

This research thus appears a vindication – albeit with some variation and expansion – of the extant progressive paradigm's *hegemony*, *mobilisation/exploitation*, and *interest group conflict sub-paradigms*. However, as the following chapter demonstrates, my model still leaves room for insights from the conservative paradigm, albeit re-interpreted, de-limited, and resituated.

Chapter 7: On the rise and fall of ideological movements in Sunni Lebanon: Pan-Arab Nationalism, Marxism, and Islamism in comparative historical perspective.

7.

Having revised the first IV foundational assumption within the Sunni-Lebanese context, I now address the second and third foundational assumptions, expressed in the research questions: 1) How did the justificatory ideology/movement come to popularise among Sunni-Lebanese militants at that time? (*à la* foundational assumption 2); and 2) How did the justificatory ideology/movement subsequently come to lose the support of Sunni-Lebanese militants? (*à la* foundational assumption 3).

The chapter follows the same structure as chapter 6, this time tracing the historical 'lifecycles' of the three case-study ideological tendencies – *Pan-Arab Nationalism, Marxism, and Islamism* - as opposed to the previous chapters' IV episode lifecycles. Again, I conclude by condensing my findings into a concise, abstracted statement/hypothesis on what these case-studies – contextually-bounded - suggest about ideological-popularisation/de-popularisation (prior to exploring how a future research agenda might help generalise/delimit/refine that hypothesis in the concluding chapter).

7.1. On ideological popularisation and de-popularisation in Sunni-Lebanon – conceptual model:

This model suggests that, as with the IV episodes, ideological-popularisation/de-popularisation among Sunni-Lebanese militants has followed a common – but by no means deterministic - causal trajectory, characterised by inter-ideological/movement competitions occurring upon each of the HSC-VSC nexus breakdowns detailed in the previous chapter. More so than my IV causation model, this ideology lifecycle model presents ample opportunities to begin integrating, re-interpreting, resituating, and delimiting insights from extant paradigms, and shaping further research based upon them, as we shall see.

Specifically, these ideology ‘lifecycles’ following eight phases: 1) *Conception*; 2) *Indigenisation*; 3) ‘*Salonisation*’; 4) ‘*Vanguardisation*’; 5) *HSC-VSC breakdown and opening of the ‘ideological field’*; 6) *Momentum*; 7) *Attachment*; and 8) *Disaffection and Decline*. While a broadly linear process, abortive progressions between phases can lead to ideologies/movements moving back and forth between phases, recalling similarities with Mao’s theory of ‘protracted warfare’, in which guerrilla movements move back and forth between ‘strategic defence’, ‘strategic stalemate’, and ‘strategic offence’¹⁵⁵⁵ in response to changing fortunes. Oftentimes, ideologies/movements endure multiple abortive ideological competitions, resulting in their withdrawal to the vanguard phase, before attempting once more during the next consensus breakdown.

7.1.1. Conception:

Ideology ‘lifecycles’ begin, necessarily, with their conception – an obvious point but one which, as discussed in chapters 1-3, extant paradigms fail to consider, encouraging tendencies towards explicit or implicit unsubstantiated assumptions on the motives/mindsets etc., of ideology architects/cadres¹⁵⁵⁶. Two pathways of conception predominate¹⁵⁵⁷:

7.1.1.1. ‘*Deliberate*’ conception:

An ideology is deliberately formulated to critique a problematic *status quo* and propose an actionable alternative - diagnosing societal ills (diagnostic framing), proposing prognostic frames and, often, grouping frames (chiefly through

¹⁵⁵⁵ As articulated by Mao in a series of lectures in 1938, the transcript of which is now available as: Mao Tse-Tung, “On Protracted War,” *Lecture series for the Yen-an Association for the Study of the War of Resistance against Japan, May 26 to June 3, 1938*. Available at: https://www.marxists.org/reference/archive/mao/selected-works/volume-2/mswv2_09.htm

¹⁵⁵⁶ Notably the assumption of a conspiracist, Machiavellian mindset among ideology architects (discussed in Chapter 1) – rooted in conspiracy theories over the French Revolution and prolific ever since – that assumes ideology architects/cadres to be insincere, cynical manipulators using fantastical ideological narratives to dupe the gullible into serving as unwitting foot soldiers for their own totalitarian or bigoted designs. Such assumptions have been rejuvenated in recent times, notably: 1) explicit or implicit suggestions that the leadership of jihadist groups like IS are using ideological narratives insincerely to recruit gullible foot soldiers in service of their totalitarian agenda (for surely, they cannot themselves believe such crazy narratives!); 2) a broadly unchallenged narrative that US President Trump uses populism, lies and conspiracy theories cynically in a self-serving manner to manipulate his base into cementing his power; and 3) the increasingly pernicious conspiracy theory of ‘cultural Marxism’ recently lent a thin veneer of academic respectability by public intellectuals like Jordan Peterson and a number of right-wing politicians (Tanner Mirrlees, “The Alt-Right’s Discourse of ‘Cultural Marxism’: A Political Instrument of Intersectional Hate,” *Atlantis* 39(1) (2018), 61).

¹⁵⁵⁷ Albeit the distinction may not be as discrete as our model would immediately suggest.

delineating victims and villains). They then seek to disseminate that ideology, overtly (via speeches, written manifestos, etc.) or subversively (through persuasive mediums such as novels, poems, etc.). Ideologies conceived by one individual or group may be splintered, augmented, refined, and/or adapted to different/specific settings by different individuals or groups.

7.1.1.2. 'Organic' conception:

An ideology gradually and dialectically coalesces from discussions on abstract, relatively 'apolitical' or pre-ideological ideas which are then interpreted/adapted according to specific real-world contexts, leading to critiques of the *status quo* and demands for change¹⁵⁵⁸. Alternatively, ideologies may develop as politicisations of cultural revivalist movements (especially many primordialist nationalisms¹⁵⁵⁹).

In both cases, conception is a rational exercise (though often drawing irrational conclusions¹⁵⁶⁰), involving sincere attempts to understand and remedy real/perceived societal ills. This questions the above-noted tendency to assume ideology architects/cadres are insincere, manipulative Machiavellians or irrational, totalitarian bigots¹⁵⁶¹.

¹⁵⁵⁸ For example, the *Jacobin* ideology that emerged out of the French Revolution found its roots in the relatively apolitical writings of enlightenment philosophes like Montaigne, Montesquieu, Rousseau, etc., - see below. While it may seem ludicrous to describe such writings as 'apolitical', a valid distinction can be made between such philosophical critiques of society (open to various interpretations and implementations) and ideologies built upon particular interpretations and constellations of them, carried forward into explicit and actionable programmes with prescribed diagnoses, prognoses, heroes and villains, etc. Testament to this distinction is the fact that we can find Rousseau's influence in ideologies as diverse as socialism and nationalism, while Voltaire found expression both in the defence and critique of enlightened absolutism, etc. Another possible distinction is that ideologies of this type often consist of philosophical writings (e.g., Rousseau) + context (starvation and feudal abuses in France) + events (the French revolution), all of which coalesce into specific interpretations and expansions of those texts alongside concrete and context-specific diagnoses and prognoses, etc. Moreover, they provide simplified and targeted distillations of those usually very dense and abstract philosophical writings, rendering them popularly accessible for the first time. They have mobilisatory power in a given context, which those philosophical writings typically do not.

¹⁵⁵⁹ See below. For example, Irish and German nationalisms emerging out of an Irish cultural revival and German romanticism, respectively, - ideas that gradually gave way to assertions that the Irish and German people existed as discrete cultures requiring and deserving independence from foreign rule (in the Irish case) or unification with other people deemed to be of that same discrete culture (in the German case).

¹⁵⁶⁰ Even the thoroughly irrational and bigoted diagnoses and prognoses of Hitler's *Mein Kampf* were motivated – to a significant degree at least - by a sincere attempt to attribute causation to and rectify the very real socioeconomic malaise he observed around him.

¹⁵⁶¹ See footnote 1686 above.

7.1.2. Indigenisation:

Ideologies conceived in one setting (in response to specific conditions/events in that setting) are frequently imported into/adapted for different settings: disenchanted individuals inspired by its success in one setting perceiving it applicable to their own. They may adopt the ideology's diagnostic frames as a framework for interpreting their own grievances, and/or applaud the success of its prognostic and/or strategic frames and propose how it could bring similar results locally.

7.1.3. 'Salonisation':

Salonisation overlaps with indigenisation, as individuals wishing to indigenise that ideology assemble to debate and refine the ideology's adaption/applicability to their own setting, and attempt to attract followers – covertly (in secret societies) or overtly (through outreach groups, publications, etc.). This phase is differentiated from what follows by an inability to attract adherents beyond intellectual milieus. This generally results from two dynamics:

- 1) Prior to a consensus breakdown, the HSC-VSC nexus remains intact, maintaining the perceived viability of the establishment ideology and popular deferment to the zu'amā', who can demonise or punish sympathy towards alternative ideologies/movements¹⁵⁶².
- 2) Following consensus breakdown, the nascent ideology/movement struggles if the 'ideological field' is saturated by more established/visible opposition ideologies/movements.

7.1.4. 'Vanguardisation':

The nascent movement's cadres begin slowly attracting adherents beyond the intellectual sphere through various outreach methods, gradually increasing their visibility in society (beyond the confines of secret societies, intellectual 'salons', and journals) which aids in attracting further non-intellectual supporters, thus setting in motion a slow snowball effect. In particular, the movement pursues support through *acts* (rather than mere proselytization) intended to increase the group's profile and emancipatory credentials, including charitable campaigns (e.g., attempts to usurp/parallel the VSC by weening menu people off zu'amā')

¹⁵⁶² As noted in chapter 5.

patronage); attempts to assume leadership and shape demands of extant *within*-establishment ideology agitation (e.g., the 1960s/70s domestic protest movement); etc. Despite these efforts, recruitment remains slow: most of the menu people continuing to perceive them with indifference, suspicion, or hostility.

This phase presents the first opportunity to begin methodologically integrating/resituating insights from both paradigms (as part of a future research agenda). It is likely that individuals recruited during this phase will generally be ideological ‘true believers’, passionate about translating the ideology’s vision into reality. However, we should not automatically consider them ‘true believers’ *à la* conservative paradigm (i.e., *ideologically persuaded* gullible dupes, psychologically-unfulfilled drifters attracted to movement-affiliation for its psychological catharsis, and/or irrational bigots – though such individuals may also feature, see below). Rather, many – if not most – will be ‘true believers’ in their being wholly convinced and committed to the ideology’s programme for understanding and remedying extant grievances; a commitment arrived at through essentially rational (if potentially misguided) contemplation; *à la post facto rationalisation*. Likewise, they differ from progressive-paradigm-style rational ‘hedgers’ – who, as chapter 6 strongly suggested, only become enamoured when IV becomes an ‘emergency’ - in that, having rejected the *status quo prior* to HSC-VSC breakdown, they are unlikely to be placated by within-establishment ideology inducements or HSC-VSC restoration (being convinced the establishment ideology is fundamentally flawed/unjust). To avoid confusion, I call these individuals ‘rational zealots’.

However, conservative-paradigm-style ‘true believers’ may also join the movement during this phase for personal, psychological reasons - drawn to the close-knit, often self-righteous, self-flatteringly-‘gnostic’¹⁵⁶³, and glamorous conspiratorial lifestyle of the fledgling movement. However, such individuals

¹⁵⁶³ By this I suggest one psychological perk of early movement membership might be the sense of intellectual superiority that comes from being ahead of the curve in understanding ‘the truth’. Such a proto-hypothesis rests well with many narcissism-centric theories on the attraction of conspiracy theories. See for example: Aleksandra Cichocka, et al., “Does Self-Love or Self-Hate Predict Conspiracy Beliefs? Narcissism, Self-Esteem, and the Endorsement of Conspiracy Theories,” *Social Psychological and Personality Science* 7(2) (Nov. 2016): pp. 157-166; Shauna M. Bowes, et al., “Looking under the tinfoil hat: Clarifying the personological and psychopathological correlates of conspiracy beliefs,” *Journal of Personality* (Aug., 2020): pp. 1-15; Evita March and Jordan Springer, “Belief in conspiracy theories: The predictive role of schizotypy, Machiavellianism, and primary psychopathy,” *PLOS One* 14(12) (2019).

would have no movement to join absent the prior efforts of the ideology architects, local ‘importers’/movement founders, and rational zealots.

At this stage, these proposed motivational profiles can only be treated as hypotheses for further research. Nonetheless, as seen, my life-cycle models (in this and the previous chapter) have helped to deductively identify such hypotheses.

7.1.5. HSC-VSC breakdown and opening of the ‘ideological field’:

As with IV causation, HSC-VSC breakdowns constitute critical junctures in the ideology lifecycle. As discussed, the bankrupting of the establishment ideology/zu‘amā’ creates a mass of progressive-paradigm-style ‘rational hedgers’ in urgent need of alternative providers of representation, protection, and provision. Movements step into this vacuum, competing with rival movements to sell themselves to the hedging masses as most able of providing – or transcending – these needs. Crucially, VSC breakdown is unnecessary if the zu‘amā’ are sufficiently alienated by the HSC breakdown to (or hope to salvage a faltering VSC by) assuming leadership of/ally with the anti-establishment cause, in which case they play a crucial role in deciding the ideological competition’s outcome (see below and appendix B).

Causal dynamics are complex, relational, dialectical, and contingent as various variables, processes, and actors interact to increase or decrease each ideology’s/movement’s likelihood of popularisation. Therefore, the below-outlined variables/processes are individually unnecessary and insufficient, acting cumulatively to promote or constrain the likelihood of an outcome. Moreover, this section will benefit more than any other from additional cross-case comparison, refinement, elaboration, etc.

Five categories of variables contribute dialectically to ideological competition outcomes:

- *Facilitating factors:* recalling/building upon the progressive paradigm *ideology/movement-centric* paradigms¹⁵⁶⁴, these factors contribute to an ideology’s/movement’s ability to 1) present itself as relevant to ‘rational

¹⁵⁶⁴ See Chapter 2.

hedgers'; 2) present itself as capable of delivering change; and 3) capture the enthusiasm of 'rational hedgers':

- *Relevant diagnostic frames*: an ideology's diagnostic frames must appear relevant representations of the 'rational hedgers' lived experiences. However, the bar for relevance is low, generally needing only to accurately reflect existing identifications of friend and foe.
- *Elite support (sincere or rhetorical), or credible means of subverting elite influence*: Due to the zu'amā's moral and material influence over their constituents, movements must have either the sincere or rhetorical support of those elites, or must possess the ability/resources to subvert that influence (e.g., by providing alternative patronage; by weening Qabadayat off zu'amā' dependence). As noted, the zu'amā' may attempt to salvage a crumbling VSC by allying rhetorically with anti-establishment forces. By salvaging their own legitimacy in this way, the menu people tend to follow them towards their choice ideology/movement.
- *Strong leadership*: is important for 1) compellingly articulating ideology/movement grievances and objectives; 2) organising, directing, and unifying the anti-establishment movement; 3) providing a cult of personality that can become a human face for often complex, abstract ideals, etc. Strong leaders are defined by, variously: 1) selfless commitment/prototypicality; 2) demonstrated willingness/ability to deliver success, etc.
- *Resources (arms, means of dissemination, organisation, etc.)*: Without the means to physically coerce change and defend against pushback or repression, movements struggle to popularise. Without means of dissemination, movements struggle to be heard above claims/criticisms by rival movements, traditional elites, or establishment defenders.
- *Precedents for success (prognostic or strategic)*: faith in and enthusiasm towards a movement is magnified if it can cite concrete precedents for success (e.g., Lebanese Marxists pointing to the success of the 1917 Russian Revolution). Frequently, precedents for strategic success (the immediate ability of the movement to protect/liberate the menu people) is more important than prognostic success (the ability of that ideology's prognostic frames to affect desired long-term improvements).

- *De-intellectualising personalities and events (charismatic leaders, martyrs, glamorising 'poster-boys', heroic episodes, etc.):* help to de-intellectualise, glamourise, and give visceral, heroic, human faces to abstract ideas, providing compelling narratives and 'positive identity information'¹⁵⁶⁵ to those who would associate with those heroes.
- *Endorsement by high-capital figures:* encourage the menu people to place their trust in, and overcome any wariness towards, a particular ideology/movement.
- *Inhibiting factors:* inhibit an ideology's/movement's chances of popularisation, even if it satisfies the above facilitating pre-requisites:
 - *Ideology/movement market is 'saturated':* ideologies/movements struggle to compete with more established ideologies/movements promising the same benefits.
 - *Ideology is too intellectual/abstract:* Ideologies that fail to de-intellectualise will struggle to popularise beyond intellectual milieus, remaining in the 'salon'/'vanguard' stages.
 - *Ideology's concepts or mobilising identities are alien or suspect:* If an ideology's concepts or mobilising identities are alien or stigmatised, that ideology will likely be regarded with disinterest, suspicion, or contempt.
 - *Movement is repressed/decapitated prior to gaining a substantial public profile:* Movements repressed or decapitated in this state likely sink into obscurity, its supporters transferring to less-repressed movements that appear more capable of delivering success, at a lower cost to its adherents.
 - *Condemnation from high-capital figures:* Ideologies/movements condemned by such figures will likely be looked upon with suspicion by the menu people.
- *Inhibiting factor neutralisers:* generally gradual processes that help to neutralise inhibiting factors:
 - *Gap appears in the ideology/movement market:* such as if the dominant ideology/movement is discredited/defeated/weakened, creating a gap in the market for competing ideologies/movements to exploit.

¹⁵⁶⁵ See Chapter 5.

- *Ideology's concepts/mobilising identities naturalised/rehabilitated*: alien/maligned concepts can be naturalised or rehabilitated, either by the fading of old identities, long term educational/propaganda programmes, cultural changes, or by the positive integration of movement cadres into society, etc.
- *Reduction of repression endured*: may increase an movement's freedom of activism while reaping the benefits of the martyr credentials garnered during that repression¹⁵⁶⁶.
- *Loss of social capital among condemnatory figures*: meaning they have less credibility when condemning ideologies/movements.
- *Spoiling factors*: recalling Trotsky's progressive paradigm dialectical reflections¹⁵⁶⁷, actions that portray – or enable others to portray – the movement negativity hinder its ability to sell itself to 'rational hedgers' as admirable and representative of, and able to deliver upon, their interests.
 - *Alienating decisions and behaviours*: if an movement takes unpopular policy stances or adopts alienating behaviours, it may alienate itself from potential supporters.
- *Scoring factors*: again recalling Trotsky, such actions can neutralise past spoiling factors and give an movement a competitive edge against rivals equally matched in facilitating factors:
 - *Redemption/renunciation of past alienating decisions and behaviours*: If a movement convincingly renounces prior unpopular policy stances and behaviours, it may rehabilitate itself in the menu people's eyes.
 - *Enduring repression after gaining a substantial public profile*: unlike early repression, repression of more established movements in the late-vanguard/popularisation stage may elicit sympathy, garner it martyr credentials, provoke further resentment towards the oppressing party, and/or validate the movement's narratives.
 - *Acts of courage/self-sacrifice/integrity/prototypicality in marked contrast to traditional elites/rival movements*: echoing the progressive *organic* sub-paradigm, admirable acts by movement leaders/cadres – especially when contrasting with zu'amā'/rival movement behaviour - can earn movements points in an ideological competition.

¹⁵⁶⁶ See below.

¹⁵⁶⁷ See Chapter 2.

Ideologies/movements failing to popularise may return to the vanguard phase – retaining its rational zealots – or regress into the salon phase as rational zealots migrate to the successful movement. The unsuccessful movement must usually wait until the next HSC-VSC breakdown (after the de-popularisation of the ideological competition’s winner) before making another bid for popularity.

N.B.: my empirical analysis involves a total of five such ideological competitions. To avoid expending inordinate and distracting space presenting each one, I have compiled all details/evidence from these competitions as a collection of tables, presented in Appendix B.

7.1.6. Momentum:

Once dominant in the ideological/movement field, the successful ideology/movement develops its own momentum, becoming the default locus for all motivation types (rational hedgers, conservative-paradigm-style ‘radicalisees’, and/or other types yet to be conceptualised)¹⁵⁶⁸. Thus, this stage presents another opportunity to begin resituating insights – extant and future - from extant paradigms.

7.1.7. Attachment:

This phase provides an opportunity for integrating extant/shaping further research reconciling the rationality/affective dynamics paradox dichotomising IV research¹⁵⁶⁹. This chiefly invites insights from the progressive *organic* sub-paradigm¹⁵⁷⁰: Firstly, as the movement begins delivering upon its goals – or impresses its hedgers through its courage, selflessness, ideological purity, prototypicality, etc., - many hedgers may form emotional attachments to the movement and its beliefs (affection for the movement’s cadres often preceding and expediting affection for, and faith in, its ideological program). Additionally,

¹⁵⁶⁸ On one hand, the classic, non-ideologically-motivated ‘hedgers’ of the progressive paradigm begin to throw their support behind the movement *en masse*; for protection and/or for definitive change, in whatever form that may take. On the other hand, the movement may begin to attract ‘outsiders’ – those classic, psychologically-motivated ‘radicalisees’ of the conservative paradigm, who gravitate to the strong and glamorous movement that is shaking up the *status quo* and offering satisfaction of self-actualisation needs (e.g., purpose, community, self-esteem, etc.).

¹⁵⁶⁹ Notably the progressive paradigm’s struggle to deal with affective dynamics while retaining the rationality of IV. See chapter 2.

¹⁵⁷⁰ As outlined in chapter 2.

ideological solidarity frames are reified as movement adherents become accustomed to seeing ingroup members as comrades and outgroup members as enemies, solidifying their sense of affiliation, and, by extension, lending further credence to its diagnostic and prognostic frames. Alternatively/simultaneously, attachment result from immersion/socialisation, in which time spent with the group and its cadres (rational zealots and conservative paradigm-style radicals) – and the resulting affection and trust cultivated – can lead to hedgers being initiated and socialised into the movement’s belief-system – often beginning with a comradely initiation into its shared universe of symbols, vocabulary, and meaning and then its ideological tenets. However, conservative paradigm dynamics such as ‘group-think’ and ‘extremity shift’¹⁵⁷¹ may also hold some explanatory value in explaining the ideological hardening of the ‘hedgers’. Simultaneously, engaging in violence with that movement against perceived enemies will likely increase bonding between ‘hedgers’ and ‘rational zealots’/conservative-paradigm-style radicals and their beliefs, while hardening attitudes towards establishment-defenders, vindicating the ideology’s villainising diagnostic/solidarity frames.

Such attachment may promote extreme violence as the increasingly affectively-motivated hedgers increasingly interpret their circumstances through an ideological lens, *producing* two-dimensional, us-vs-them thinking (rather than the conservative paradigm’s assumptions of ideologies *catering* for two-dimensional thinking). I call this the ‘Robespierre effect’: individuals not normally predisposed to violence increasingly coming to accept violence – even extreme, brutal, and indiscriminate violence – as necessary to effect and protect the movement’s gains. Similarly, it may render them resistant to within-establishment ideology social contract tweaks and/or conciliatory gestures that might have successfully placated them during their earlier ‘hedging’ phase. Similarly, it may render them resistant to rational appeals aimed at discrediting the ideology/movement, as all such attempts are immediately dismissed as conspiratorial manipulations by oppressive vested interests. As above, all these hypotheses can only be treated as hypotheses prior to further research, but we can again credit the CHA approach with their identification.

¹⁵⁷¹ This is discussed in the footnotes of chapter 1’s discussion on ideological-popularisation according to the conservative paradigm’s RVE iteration.

7.1.8. Disaffection and decline:

Ideologies/movements lose supporters not due to establishment-defender ideology/movement-discrediting interventions, but because the ideology/movement discredits itself:

- 1) The movement may fail to deliver upon its promises, causing its adherents to lose faith in it, and to reconsider if their interests may be best served by reconciling with the establishment – however imperfect – rather than enduring further fruitless carnage and instability.
- 2) Movement cadres may alienate themselves – either through directly alienating behaviour (e.g., corruption, brutality, brutishness, gangsterism/warlordism, etc.) or indirectly alienating behaviour (e.g., not practicing what they preach - giving rise to accusations of hypocrisy, insincerity, self-servitude, etc.).
- 3) The Movement fragments into rival splinter factions – possibly even turning away from their shared enemy and upon each other. This alienates its support base by prompting accusations of insincerity and/or putting personal interests/egos ahead of the movement's goals and, perhaps more importantly, denying the support base a focussed, effective, cohesive, and unitary movement to rally behind, thus negating its very raison d'être for its rational hedging base. It also breaks down the ideology's vital solidarity framing, as those who once united around a perceived shared identity come to experience each other not as natural comrades but treacherous enemies.
- 4) The movement loses sight of/stops pursuing/is co-opted away from its original vision, prompting accusations of corruption, weak-will, or 'selling-out', and no longer providing a vehicle for delivering the hedgers from their woes, prompting a re-evaluation of priorities and renewed amenability to conciliatory appeals from establishment-defenders.
- 5) The movement is militarily subjugated, its adherents driven underground. Hedgers may lose faith in the movement's ability to deliver upon its promises, or else evaluate that the cost of continued involvement is too high compared to prospective payoffs.
- 6) If communal elites have assumed leadership over the movement to leverage tweaks to the HSC-VSC, then the movement may be defanged if those elites accept such tweaks, leaving the more radical menu people

without leadership and with little other choice than to re-acquiesce to the restored HSC-VSC.

These dynamics can produce a kind of Gramscian ‘organic crisis’ or social contract breakdown in the ideology/movement, providing a window for rivals or the establishment to (re)assert themselves.

As the movement haemorrhages support, it functions in the same way as movements who fail to popularise initially: returning to the vanguard stage (to re-evaluate its strategy or framings) or collapsing entirely as adherents grow embittered and/or fatalistic towards it. In subsequent HSC-VSC breakdowns and ideological competitions, it may be rendered irrelevant if a more popular movement monopolises anti-establishment agitation. Should such a rival fail to materialise however, it may have a chance to rejuvenate should the hedgers consider it a lesser evil than the *status quo*, potentially even embracing it with renewed enthusiasm as the resurgent movement can say “we told you so” in the face of yet another crisis.

7.2. Pan-Arab Nationalism:

7.2.1. Conception:

Pan-Arab Nationalism was indigenised directly and consciously – via several avenues¹⁵⁷² - from two European nationalist traditions, ‘contractual’ and ‘primordial’, established in the late 18th-19th centuries:

Contractual Nationalism emerged from the *American War of Independence* and *1789 French Revolution*¹⁵⁷³ as an activist consolidation of enlightenment proposals for rationalising society (in contradistinction to the perceived *irrationality* of feudalism/dynasticism¹⁵⁷⁴), particularly Rousseau’s doctrine of ‘social contractarianism’¹⁵⁷⁵. Such ideas sought to replace arbitrary

¹⁵⁷² See below.

¹⁵⁷³ Andreas Wimmera and Yuval Feinstein, “The Rise of the Nation-State across the World, 1816 to 2001,” *American Sociological Review* 75(5) (2010), 765; Hobsbawm, *The Age of Revolution*, 55; Erica Benner, “Nationalism: Intellectual Origins,” in *The Oxford Handbook of the History of Nationalism*, ed. John Breuilly (Oxford: Oxford University Press, 2013), 45.

¹⁵⁷⁴ E.J. Hobsbawm, *Nations and Nationalism since 1780: Programme, myth, reality*, 2nd ed. (Cambridge: Cambridge University Press, 1992 [1990]), 20; Wimmera and Feinstein, “The Rise of the Nation-State,” 765.

¹⁵⁷⁵ Rejai has dubbed Rousseau the “prime philosopher of nationalism” (Mostafa Rejai, *Political Ideologies: A comparative approach*, 2nd ed. (Oxon and New York: Routledge, 2015 [1995]), 30) while Israel has gone so far as to describe French revolutionary nationalism as “institutionalized Rousseauism” (Jonathan Israel, *Revolutionary Ideas: An intellectual history of the French*

hierarchies with rationally-optimised social arrangements serving the 'popular will' of the nation's citizens¹⁵⁷⁶. Contractual nationalism influenced Pan-Arab Nationalism on account of its perceived role in the West's modernisation (particularly technological/administrative/logistical innovations¹⁵⁷⁷ and national cohesion and vitality¹⁵⁷⁸) and its impression on an Arab bourgeoisie/petit-bourgeoisie experiencing the same yearning for expanded opportunities and liberalisation experienced by their French counterparts in 1789¹⁵⁷⁹.

Primordial/Romantic Nationalism developed partly in response to contractual nationalism's French Revolutionary/Napoleonic excesses¹⁵⁸⁰. It denounced contractual nationalism's hubristic social engineering in pursuit of natural goodness and vitality perceived to reside in the national 'genius'¹⁵⁸¹ of cultural groups. Spearheaded by German philosophers (Herder, Fichte, and Humbolt)¹⁵⁸², primordial nationalism held that communities sharing common histories¹⁵⁸³ and/or languages¹⁵⁸⁴ constituted distinct peoples with distinct political interests and character, best served by forming united, exclusive nations. Conversely, exogenous cultural influences were believed to dilute and corrupt national genius, leading to degeneracy¹⁵⁸⁵. Linguistic nationalism was viewed as

Revolution from the Rights of Man to Robespierre (Oxford and Princeton: Princeton University Press, 2014), 22).

¹⁵⁷⁶ Wimmera and Yuval Feinstein, "The Rise of the Nation-State," 756; Lloyd Kramer, *Nationalism in Europe & America: Politics, Cultures, and Identities since 1775* (Chapel Hill: University of North Carolina Press, 2011), 30.

¹⁵⁷⁷ Gilmour, *Lebanon*, 57; Dawn, "From Ottomanism to Arabism," 389-381; Rogan, *The Arabs*, 9, 83; Peretz, *The Middle East*, 67.

¹⁵⁷⁸ Dawn, "From Ottomanism to Arabism," 381; Carter Vaughn Findley, "The Advent of Ideology in the Islamic Middle East (Part II)," *Studia Islamica* 56 (1982), 148.

¹⁵⁷⁹ Tariq Ismael and Jacqueline Ismael, "The Burden of History," in *Politics and Government in the Middle East and North Africa*, eds, Tariq Ismael and Jacqueline Ismael (Miami: Florida International University Press, 1991), 37; Kramer, "Arab Nationalism," 177.

¹⁵⁸⁰ Dankwart A. Rustow and Salvator Attanasio, *Freedom and Domination: A historical critique of civilization* (Princeton, NJ: Princeton University Press, 1980 [1950]), 528; Thomson, *Europe since Napoleon*, 99; Roy Porter and Mikulas Teich, "Introduction," in *Romanticism in National Context*, eds. Roy Porter and Mikulas Teich (New York: Cambridge University Press), 5; Maurice Cranston, *The Romantic Movement* (Cambridge, MA: Blackwell Publishers Ltd., 1994), 84.

¹⁵⁸¹ Bilenky, *Romantic Nationalism*, 1.

¹⁵⁸² See: Benner, "Nationalism," 41-46; Bilenky, *Romantic Nationalism*, 2; Kramer, *Nationalism*, 58-61.

¹⁵⁸³ Kramer, *Nationalism*, 58.

¹⁵⁸⁴ Language, it was proposed, lent peoples their distinct character by directing and constraining their unique styles of thinking (and, by extension, institutions). Language was believed to reflect "the particular mindset of the [...] nation" (Bilenky, *Romantic Nationalism*, 1). See also: Kramer, *Nationalism*, 58-61

¹⁵⁸⁵ This belief comes across most strongly in German romantic nationalism, where it would provide the 'intellectual' fuel or justification for, among other things, anti-Semitism in 19th and early 20th Germany (and elsewhere). German nationalism, in particular, "identified the Jew as the culprit responsible for the Germanic decline from purity and the subsequent ignominious descent from its mythical past. This anti-Semitism had as its goal the redemption of Germany". See: Pierre James, *The Murderous Paradise: German Nationalism and the Holocaust* (Westport, CT:

a potential prophylactic against external domination/subversion¹⁵⁸⁶ while, more broadly, rulers considered it expedient to cultivate primordialist nationalisms that unified subjects around their rule (absent the trade-offs of contractarianism) and encouraged them to sacrifice personal interests in the nation's service¹⁵⁸⁷. Primordial nationalism influenced Pan-Arab nationalism in its conception of the Arabs as a distinct and gifted nation (on account of language, history, culture, and divine selection) uniquely equipped to restore Islamic civilisation¹⁵⁸⁸, and in its determination to purge Islamic civilisation from corrupting non-Arab accretions¹⁵⁸⁹ and build a heroic, self-sacrificing citizen phalanx against external threats.

7.2.2. Indigenisation:

Nationalism – indigenised as Pan-Arab Nationalism (alongside rival *Ottoman* and *Pan-Islamic* nationalisms) - entered Arab consciousness through several avenues:

- 1) Ottoman students in Europe wrote prolific books applauding Western modernism (especially technological and administrative innovations) which they attributed to nationalism¹⁵⁹⁰.
- 2) Interest in nationalism was prompted by its apparent role in fomenting anti-Ottoman Christian revolts in the Balkans¹⁵⁹¹.

Praeger, 2001), 111 (105-111 generally). See also: Marc Neugröschel, "Anti-Semitism as a civil religion: progressive paradigms in the anti-Semitic construction of German National identity," in *Comparative Perspectives on Civil Religion, Nationalism, and Political* influence, eds. Eyal Lewin, Etta Bick, and Dan Naor (Hershey, PA: Information Science Reference, 2017), 121; Felicity Rash, *German Images of the Self and the Other: Nationalist, colonialist and anti-Semitic discourse 1871-1918* (Basingstoke and New York: Palgrave Macmillan, 2012), 82; Marvin Perry and Frederick M. Schweitzer, *Anti-Semitism: Myth and hate from antiquity to the present* (New York: Palgrave Macmillan, 2002), 89.

¹⁵⁸⁶ Benner, "Nationalism, 42.

¹⁵⁸⁷ Charles Tilly, "States and Nationalism in Europe 1492-1992," *Theory and Society* 23(1) (Feb., 1994), 133-140.

¹⁵⁸⁸ An idea first conceived by Islamic modernists but later folded into Arab nationalism. See: Roshwald, "Nationalism in the Middle East," 222; Dawn, "From Ottomanism to Arabism," 394; Eliezer Tauber, "Rashid Rida as Pan-Arabist before World War I," *The Muslim World* 79(2) (Apr., 1989), 104; Steven Wagner, "British intelligence and Arab nationalism: the origins of the modern Middle East," in *The First World War and its Aftermath: The shaping of the Middle East*, ed. T.G. Fraser (London: Gingko Library, 2015), 65.

¹⁵⁸⁹ Ibid.

¹⁵⁹⁰ Dawn, "From Ottomanism to Arabism," 381.

¹⁵⁹¹ Yelda Demirag, "Pan-Ideologies in the Ottoman Empire against the West: From Pan-Ottomanism to Pan-Turkism," *The Turkish Yearbook of International Relations* 36 (2006), 145; Goldschmidt Jr., *A Concise History*, 185; Peretz, *The Middle East*, 68; Salibi, *A House of Many Mansions*, 46.

- 3) When Muhammad Ali Pasha – renegade governor of Ottoman Egypt - invaded the Levant¹⁵⁹², he employed Arab Nationalist legitimising rhetoric, encouraging (unsuccessfully) the Levantines to identify as Arabs (rather than by religion, tribe, region, etc.) for the first time¹⁵⁹³.
- 4) The Ottomans sought to solidify their legitimacy and strengthen themselves administratively, militarily, and technologically against external threats¹⁵⁹⁴ by selectively embracing aspects of European nationalism and modernisation. It first sought to cultivate pan-religious Ottoman nationalism¹⁵⁹⁵ and, upon losing most of its Christian-majority territories, Pan-Islamism¹⁵⁹⁶ as a means of galvanising its subjects¹⁵⁹⁷; while inviting European advisors to guide modernising reforms in administration, the military, and logistics. These reforms could not but import the European ideas upon which they rested, which were absorbed by the burgeoning Ottoman administrative and military classes¹⁵⁹⁸.

Pan-Arab Nationalism, specifically, resulted from three developments:

- 1) Some Arab Christians hoped Arab Nationalism could replace centuries of confessional hierarchy by redirecting identity from religion towards ethnicity. Encouraged and aided by Muhammad Ali Pasha and the French and US Christian missionaries he invited to establish modern schools, they spearheaded an Arab cultural revival seeking to inculcate linguistic nationalism¹⁵⁹⁹.

¹⁵⁹² Through his son, Ibrahim Pasha.

¹⁵⁹³ Ismael and Ismael, "The Legacy of Nationalism," 61; Peretz, *The Middle East*, 136.

¹⁵⁹⁴ Encroaching Western states, Christian nationalist revolts, and the Egyptian Pashas.

¹⁵⁹⁵ Ottomanism, based on French Revolutionary-style contractual nationalism, sought to increase the cohesion, loyalty and vitality of the Empire's subjects by replacing their traditional religious identities with a unifying one based on solidarity with and loyalty towards the Empire. It was accompanied by attempts at liberalising reforms and constitutionalism intended to create a more viable social contract. See: Haldun Gülalp, "Using Islam as Political Ideology: Turkey in Historical Perspective," *Cultural Dynamics* 14(1) (2002-3), 25; and Rogan, *The Arabs*, 9.

¹⁵⁹⁶ Salibi, *A House of Many Mansions*, 45; Jacob M. Landau, *The Politics of Pan-Islam: Ideology and Organization* (New York: Oxford University Press, Inc., 1990), 22; Traboulsi, *A History of Modern Lebanon*, 69.

¹⁵⁹⁷ Dawn, "From Ottomanism to Arabism," 380; Findley, "The Advent of Ideology," 154; Provence, *The Last Ottoman Generation*, 16; Salibi, *A House of Many Mansions*, 46.

¹⁵⁹⁸ Rogan, *The Arabs*, 90, 110; Peretz, *The Middle East*, 66-68, 72; Goldschmidt Jr., *A Concise History*, 176; Kramer, "Arab Nationalism," 178; Peter Mansfield, *A History of the Middle East*, 3rd ed. (London: Penguin Books, 2010), 47; Provence, *The Last Ottoman Generation*, 33.

¹⁵⁹⁹ Dawn, "From Ottomanism to Arabism," 387; Ismael and Ismael, "The Legacy of Nationalism," 61-62; Peretz, *The Middle East* 136; Goldschmidt Jr., *A Concise History*, 196-197. Such a trend we can see paralleled in the cultural revivals which helped pave the way for the popularisation German and Irish nationalisms, a link explicated in Bassam Tibi, "The interplay between social and cultural change," in *Arab Civilization: Challenges and Responses: Studies in Honor of*

- 2) Ottoman territorial losses to Western aggressions and Christian revolts prompted Arabs to fear Ottoman collapse¹⁶⁰⁰. This prompted speculation over the empire's vulnerabilities (and whether a nationalist modernising project – modelled on the West and/or on Arab primordial vitality - might prove more resilient)¹⁶⁰¹ alongside preparations for a fall-back Arab polity should the Ottoman empire fall¹⁶⁰².
- 3) Following the 1908 *Young Turk Revolution*, the new *Committee of Union and Progress* [CUP] government provoked Arab resentment through its aggressive Turkish nationalism, designed to unify the empire by Turkifying its non-Turkish subjects¹⁶⁰³. This was culturally insulting (eliciting comparisons with France's colonisation of Algeria¹⁶⁰⁴) and frustrated the aspirations of the growing Arab middle classes, who were discriminated against in political/administrative appointments and often lacked the newly-requisite Turkish linguistic skills¹⁶⁰⁵. Turkification was, moreover, accompanied by administrative centralisation, which threatened Arab elites accustomed to local autonomy¹⁶⁰⁶. Thus, these developments prompted both rebellious impulses and dialectical responses from educated Arabs who – reminded of their Arabness by the CUP's attempts to erase it¹⁶⁰⁷ – began promoting Arab Nationalism in response.

Constantine K. Zurayk, eds. George N. Atiyeh and Ibrahim M. Oweiss (Albany: State University of New York Press, 1988), 177.

¹⁶⁰⁰ Mahmoud Haddad, "The Rise of Arab Nationalism Reconsidered," *International Journal of Middle East Studies* 26(2) (May 1994), 215; Ismael and Ismael, "The Legacy of Nationalism," 60; Mesut Uyar, "Ottoman Arab Officers between Nationalism and Loyalty during the First World War," *War in History* 20(4) (2013), 535; Eugene Rogan, *The Fall of the Ottomans: The Great War in the Middle East, 1914-1920* (London: Penguin Books, 2015), 288.

¹⁶⁰¹ Gilmour, *Lebanon*, 57; Haddad, "The Rise of Arab Nationalism Reconsidered," 215.

¹⁶⁰² Haddad, "The Rise of Arab Nationalism Reconsidered," 215.

¹⁶⁰³ This included such policies and practices as imposing Turkish as the sole language to be used in schools, courts, and administrative posts; Turkifying street names and other signage; and even moves – by some more radical reformers – to abolish Arabic and translate the Qur'an into Turkish. See: Haddad, "The Rise of Arab Nationalism Reconsidered," 208-209; Maxime Rodinson, *The Arabs*, trans. Arthur Goldhammer (Chicago: The University of Chicago Press, 1981), 94; Mansfield, *A History of the Middle East*, 147; Peretz, *The Middle East*, 139; Rogan, *The Fall of the Ottomans*, 24.

¹⁶⁰⁴ Haddad, "The Rise of Arab Nationalism Reconsidered," 214.

¹⁶⁰⁵ David Commins, "Religious Reformers and Arabists in Damascus, 1885-1914," *International Journal of Middle East Studies* 18 (1986), 412; Mark Farha, "From anti-imperial dissent to national consent: The First World War and the formation of a trans-sectarian national consciousness in Lebanon," in *The First World War and its Aftermath: The Shaping of the Middle East*, ed. T.G. Fraser (London: Gingko Library, 2015), 96.

¹⁶⁰⁶ Roshwald, "Nationalism in the Middle East," 224; Goldschmidt Jr., *A Concise History*, 197.

¹⁶⁰⁷ Peretz, *The Middle East*, 142.

7.2.3. 'Salonisation':

Numerous Pan-Arab Nationalist intellectual and military-conspiratorial societies – overt and covert – proliferated in the Ottoman Empire's final years. While initially calling for autonomy within and subject to the Ottoman Empire¹⁶⁰⁸, some began advocating an independent Pan-Arab nation state¹⁶⁰⁹. Upon the outbreak of World War One, these latter groups conspired with Sharif Hussein of Mecca, along with Britain, to launch an anti-Ottoman Arab revolt to establish such an entity¹⁶¹⁰.

These early Pan-Arab Nationalists were marginal (estimated at just 126 activists in 1914¹⁶¹¹). Prior to the war, their societies were easily driven underground (testament to their lack of popular support and hindering their ability to appeal for such support)¹⁶¹² while the Arab Revolt – led by Hussain's son, Faysal - struggled to recruit, let alone prompt a sweeping Arab revolt/mutiny¹⁶¹³, with most Arabs voluntarily defending the Empire against what they perceived as

¹⁶⁰⁸ The Austro-Hungarian dual-monarchy was a favourite blueprint. For example: The *Ottoman Decentralisation Party* (est. 1912) demanded local autonomy and equal rights for Turks and Arabs within the Ottoman Empire, including the use of Arabic in courts, administration, local assemblies, and school. The *Beirut Reform Society* (est. 1913) echoed these demands, as did, initially, *al-Fatat* (est. 1911). *Al-Kahtaniya* (est. 1909) and *Al-'Ahd* (est. 1913), meanwhile, both called for a dual Turkish-Arab model of governance based on the Austro-Hungarian dual monarchy. See: Goldschmidt Jr., *A Concise History of the Middle East*, 199; Dawn, "The Rise of Arabism," 146; Ismael and Ismael, "The Legacy of Nationalism," 64; Johnson, *Class and Client*, 16; Haddad, "The Rise of Arab Nationalism Reconsidered," 215; Rodinson, *The Arabs*, 94.

¹⁶⁰⁹ Despairing of achieving the sought-after compromise with the CUP government, some eventually radicalised their demands towards an independent Arab nation state. Notably among such proponents was Islamic modernist-cum-Pan-Arab Nationalist Rashid Rida and his *Society of the Arab Association* (est. 1911) alongside the *al-Fatat* and *al-'Ahd* secret societies. See: Eliezer Tauber, "Rashid Rida as Pan-Arabist before World War I," *The Muslim World* 79(2) (Apr., 1989), 102; Eliezer Tauber, "Rashīd Riḍā's political attitudes during World War I," *The Muslim World* 135(1-2) (Jan.-Apr., 1995), 107; Ismael and Ismael, "The Legacy of Nationalism," 64; Rodinson, *The Arabs*, 94.

¹⁶¹⁰ The *al-Fatat* and *al-'Ahd* secret societies (who had, prior to the outbreak of war, favoured autonomy within the Ottoman Empire and a Austro-Hungarian-style dual-monarchy, respectively) approached Sharif Hussain of Mecca to urge him to lead an Arab revolt against Ottoman rule, which would, they believed, be joined by mutinies of Arab battalions led by officers involved in *al-Fatat* and *al-'Ahd* (this would not transpire). Sir Henry McMahon, British High Commissioner in Egypt, sent the by now infamous letter to the Sharif she told him he would be given the entire region except the part of greater Syria reference wanted. But so Henry, based as it was in Cairo, made his promise without authorisation from London. These actors were encouraged in turning against the Ottoman empire by the support offered by Britain in the 1915 'McMahon Correspondence'. See: C. Ernest Dawn, "The Amir of Mecca Al-Husayn Ibn-'Ali and the Origin of the Arab Revolt," *Proceedings of the American Philosophical Society* 104(1) (Feb., 1960), 22; Dawn, "The Rise of Arabism," 147; McMillan, *From the First World War*, 94; Peretz, *The Middle East*, 43.

¹⁶¹¹ Dawn, "The Rise of Arabism," 149.

¹⁶¹² Traboulsi, *A History of Modern Lebanon*, 69; Rogan, *The Fall of the Ottomans*, 25.

¹⁶¹³ Uyar, "Ottoman Arab Officers," 542; Sean McMeekin, *The Ottoman Endgame* (London: Penguin Books, 2016), 307, 342, 361.

uncivilised Bedouin raiders¹⁶¹⁴ and/or a treasonous trojan horse for British imperialism¹⁶¹⁵. This resulted from (and testifies to), on one hand, the continued popular legitimacy of the Ottoman ruling contract¹⁶¹⁶ and, on the other, the continued inaccessibility of the abstract, intellectual concepts of nationalism and Arab identity (see Appendix B).

7.2.4. 'Vanguardisation':

Pan-Arab Nationalism experienced two vanguard periods. The first carried Pan-Arab Nationalism into its first ideological competition, in which it established itself as the *de jour* ideology among elites and intellectuals but only loosely and ambiguously among the menu people. The second vanguard period rejuvenated Pan-Arab Nationalism as an anti-establishment force and led it into an ideological competition in which it broadly monopolised anti-establishment sentiments among the menu people:

7.2.4.1. *First vanguard: Ottoman collapse and colonial rule (c. 1918-1930s):* Faysal's 'Arab Revolt' was more an elite putsch than an ideological vanguard. Nevertheless, it formed a reference point for the coalescence of a broadly unified Pan-Arab Nationalist vanguard upon the Empire's collapse, as Arab elites – most previously hostile or ambivalent towards Faysal and his Secret Society allies – flocked to his banner in hope of salvaging some form of independence, stability, and popular legitimacy as the old order collapsed and foreign occupation threatened¹⁶¹⁷. Anxious to pre-empt colonial attempts to shape the new order¹⁶¹⁸ (and ingratiate themselves to the new heir apparent in hope of protecting their interests/privileges¹⁶¹⁹), these elites declared a parliamentary monarchy under Emir Faysal.

¹⁶¹⁴ Birgit Schaebler, "From urban notables to "noble Arabs": shifting discourses in the emergence of nationalism in the Arab East, 1910-1916," in *From the Syrian Land to the States of Syria and Lebanon*, eds. Thomas Phillip and Christoph Schumann, (Beirut: Ergon Verlag Würzburg in Kommission, 2004), 196; Rogan, *Fall of the Ottomans*, 367.

¹⁶¹⁵ Michael Provence, "Ottoman Modernity, Colonialism, and Insurgency in the Interwar Arab East," *International Journal of Middle East Studies* 43 (2011), 216.

¹⁶¹⁶ Rogan, *The Arabs*, 24, 54; Salibi, *A House of Many Mansions*, 47; Basheer M. Nafi, "The Arabs and Modern Turkey: A Century of Changing Perceptions", *Insight Turkey* 11(1) (2009), 65.

¹⁶¹⁷ Provence, "Ottoman Modernity," 216.

¹⁶¹⁸ Ibid; and Ismael and Ismael, "The Legacy of Nationalism," 67/

¹⁶¹⁹ Fred H. Lawson, "The northern Syrian Revolts of 1919-1921 and the Sharifian regime: congruence or conflict of interests and ideologies?" in *From the Syrian Land to the States of Syria and Lebanon*, eds. Thomas Phillip and Christoph Schumann, (Beirut: Ergon Verlag Würzburg in Kommission, 2004), 269.

This elite embrace of Pan-Arab Nationalism was institutionalised in an elected parliament - the *Syrian National Congress* - claiming representation of *Greater Syria* (Syria, Palestine, Lebanon, and Jordan) and calling for 'Arab brotherhood' with an independent Iraq¹⁶²⁰. The Congress shaped its discourse and demands around an explicitly Pan-Arab Nationalist framework, declaring independence - and repudiating colonial designs to occupy and divide the Arab lands¹⁶²¹ - on grounds of the shared linguistic, historical, economic, natural, and racial bonds uniting Arabs¹⁶²². This discourse also formed the framework through which they attempted to legitimise the new order to the Arab menu people; a framework that depended on those menu people being educated into, and persuaded of, its ideas/tenets.

This Pan-Arab Nationalist vanguard entered ideological competition almost immediately, as Ottoman collapse created a vacuum into which numerous movements competed to shape what would replace it. Thus, many of the activities and dynamics of the vanguard phase overlapped with the ideological competition phase (see *Section 7.2.5.* and Appendix B).

7.2.4.2. *Second vanguard: 'radical' Pan-Arab Nationalism (1948-1958):*

Pan-Arab Nationalism lost its anti-establishment vitality from the 1930s as the elites embodying it acquiesced to the new establishment¹⁶²³ (while no alternative leaders/movements existed to take over its anti-establishment mission), and the menu people's own understanding of, and attachment to, Pan-Arab Nationalism remained too weak to prevent their being led into acquiescence by their zu'amā'. This would begin to change, however, in 1948.

1948 saw the establishment of the State of Israel and the combined-Arab failure to reverse it¹⁶²⁴. The following evaluations – undertaken by intellectuals and military officers raised in the discourses of Pan-Arab Nationalism¹⁶²⁵ - proffered the diagnostic and prognostic frames outlined above¹⁶²⁶ – emphasising

¹⁶²⁰ Dawn, "The Rise of Arabism," 148-152.

¹⁶²¹ Those designs being exposed by the recent leak of the *Sykes-Picot Agreement* by the Russian Revolutionary Government. Ibid.

¹⁶²² Ibid.

¹⁶²³ As we discussed in Chapter 5 and elucidate below.

¹⁶²⁴ Comprising the armed forces of Egypt, Jordan and Syria, alongside detachments from Iraq, Lebanon, Saudi Arabia and Yemen, and various volunteer irregular forces. See: Benny Morris, *1948: A History of the First Arab-Israeli War* (New Haven and London: Yale University Press), Chapter 5.

¹⁶²⁵ See below.

¹⁶²⁶ See Section 7.2. above.

the need for Arab unity to concentrate their strength against imperialist encroachments¹⁶²⁷, and attributing blame to the Arab elite who had, allegedly, sabotaged the war effort through their petty rivalries¹⁶²⁸, and had become opponents of Arab unity (and allies of imperialism) in their desires to preserve their socioeconomic and socio-political privileges enshrined in the imperialist-imposed system and threatened by Arab unity¹⁶²⁹.

A new class of politicised military officers - claiming leadership over Pan-Arab Nationalism - launched a series of coups across the Middle East (notably Syria and Egypt) over the following decade¹⁶³⁰, and promised to work towards Arab unity and extirpate reactionary elite interests through socialising reforms¹⁶³¹. Within Lebanon, this tendency was expressed in the establishment, in 1949, of a Lebanese branch of the *Syrian Ba'ath Party*, and in 1952, of the ANM, both of whom would attempt to popularise Pan-Arab Nationalist ideas in Lebanon¹⁶³².

These 'radical' Arab Nationalist regimes inspired Sunni-Lebanese menu people admiration, especially Nasser as he accumulated laurels for his mounting anti-imperialist victories¹⁶³³. However, prior to 1958's HSC-VSC breakdown, admiration did not translate into active Pan-Arab Nationalist agitation¹⁶³⁴. While the HSC-VSC held, they continued to defer to their zu'amā', who fashioned themselves as spokespersons for Pan-Arab nationalism but kept it tamed under the notion of Arab unity of purpose, and punished membership in the Ba'ath Party or ANM¹⁶³⁵, both of which were, at this stage, too embryonic, small, and intellectual to resist or elicit popular sympathy¹⁶³⁶.

7.2.5. HSC-VSC breakdown and the opening of the 'ideological field':

¹⁶²⁷ Ismael and Ismael, "The Legacy of Nationalism," 69; Kramer, "Arab Nationalism," 185; Rogan, *The Arabs*, 340.

¹⁶²⁸ Rogan, *The Arabs*, 331.

¹⁶²⁹ Torrey and Devlin, "Arab Socialism," 47; Ismael, *The Arab Left*, 13; Rogan, *The Arabs*, 340; Hirst, *Beware of Small States*, 54.

¹⁶³⁰ Ismael and Ismael, "The Legacy of Nationalism," 69; Addi, *Radical Arab Nationalism*, 40; Rogan, *The Arabs*, 345.

¹⁶³¹ As noted in section 7.2. above.

¹⁶³² As'ad Abu-Khalil, "George Habash and the Movement of Arab Nationalists: Neither Unity nor Liberation," *Journal of Palestine Studies* 28(4) (Summer, 1999): pp. 91-103; Petran, *The Struggle*, 46; Ismael, *The Arab Left*, 64-65.

¹⁶³³ See below and the footnotes for the 1958 *Lebanese Crisis* in chapter 6.

¹⁶³⁴ As demonstrated in chapter 6.

¹⁶³⁵ As discussed in chapter 5.

¹⁶³⁶ Johnson, *Class and Client*, 133.

7.2.5.1. *First ideological competition: Ottoman collapse and colonial rule (c. 1918-1930s):*

Pan-Arab Nationalism's first ideological competition occurred in the context of popular resistance to the onset of Mandate rule following the Ottoman collapse, centring around the 1925-7 *Great Syrian Revolt* but, in more diffuse, spontaneous form, preceding and outlasting it. Pan-Arab Nationalism competed with two rival ideological-tendencies to assume leadership of the anti-colonial cause and shape its discourse and objectives: 1) a Marxist tendency embodied by the newly established *Communist Party of Lebanon and Syria* [CPLS]¹⁶³⁷ (see section 7.3.); and 2) a vague, diffuse *Pan-Islamist* movement, residual from the perished Ottoman Empire and the Pan-Islamist ideological discourse of its final Sultans¹⁶³⁸, advocating reunification of the Empire based around vaguely Islamic forms of solidarity juxtaposed against an encroaching West broadly conceived as 'Christian'. The outcome was ambiguous. While the Marxist tendency failed to proliferate significantly, the menu people's sentiments seem to have been vague and idiosyncratic rather than ideologically formulaic, expressing sentiments drawn from both Pan-Arab Nationalist and Pan-Islamist trends in a broadly anti-colonial, anti-Maronite, pro-Sunni backlash to the establishment of the Lebanese state¹⁶³⁹. The factors influencing this outcome are broken down in Appendix B.

7.2.5.2. *Second ideological competition: the coming of the Lebanese Crisis, c. 1955-1958:*

Pan-Arab Nationalism's second, successful ideological competition – led by Egyptian President Nasser (and introduced in chapter 6) - pitched it once more against the Marxist tendency (still represented by the CPLS¹⁶⁴⁰). As Appendix B details, the Marxist tendency found itself utterly outmatched in this competition.

7.2.6. Momentum:

¹⁶³⁷ Throughout its existence, the *Communist Party of Lebanon* has repeatedly united and detached from the *Communist Party of Syria*. For ease of reference, I refer to it as the CPSL during this particular competition, but as the CPL in our more general exploration of the movement in the next section.

¹⁶³⁸ As noted above.

¹⁶³⁹ As discussed in chapter 5.

¹⁶⁴⁰ Though, by this time, it had split into two branches, one for Syria (the CPS) and one for Lebanon (the CPL). See section 7.3.

Pan-Arab Nationalism enjoyed a brief momentum period, with active Pan-Arab Nationalist agitation (in the form of demands for Lebanon's incorporation into the UAR) lasting only until the end of the 1958 conflict, after which the Sunni-Lebanese menu people re-acquiesced to the tweaked establishment ideology/restored HSC-VSC, still deferring to their zu'amā' who had salvaged their legitimacy by assuming local leadership of the anti-establishment cause¹⁶⁴¹. During that period, however, Pan-Arab Nationalism almost entirely monopolised Sunni-Lebanese anti-establishment sentiment (the only notably exception being some localised mobilisation under the LCP, whose seem to have played a practical rather than ideological leadership role)¹⁶⁴². This was aided by the fact that, as noted, the zu'amā' retained leadership of the anti-establishment cause, through which they channelled and constrained Pan-Arab Nationalist narratives and aspirations (and encouraged the eschewal of ideological alternatives¹⁶⁴³) by way of their example, rhetoric, and direct leadership.

7.2.7. Attachment:

The Arab solidarity upon which Pan-Arab Nationalism rested was burnished throughout the pre-war protests and war's battles, in which individuals identifying as fellow Arabs forged bonds and grew accustomed to seeing fellow Arab identifiers as comrades and non-Arab identifiers (the Phoenician/French-identifying Maronites) as enemies. Additionally, during the conflict, transnational Arab solidarity was burnished as fellow Arabs rose in Jordan and Iraq in pursuit of the same cause¹⁶⁴⁴.

Though momentum was brief, attachment to Pan-Arab Nationalism – and its Nasserite leadership – extended beyond it. While its prognostic and strategic frames lost credibility/viability as Nasser reneged on incorporating Lebanon into the UAR¹⁶⁴⁵, its diagnostic and solidarity frames remained strong as Nasser asserted a face-saving discursive shift from Arab political unity to unity of

¹⁶⁴¹ See Chapter 6.

¹⁶⁴² Hottinger, *Zu'amā' and Parties*, 138.

¹⁶⁴³ The Sunni zu'amā' refused to countenance the CPL's inclusion in the zu'amā'-led *United National Front* forces who dominated and officially represented the anti-establishment forces. See: Suleiman, "The Lebanese Communist Party," 142; Tareq Y. Ismael and Jacqueline S. Ismael, *The Communist Movement in Syria and Lebanon* (Gainesville: University of Florida Press, 1998), 54.

¹⁶⁴⁴ See Chapter 6.

¹⁶⁴⁵ *Ibid.*

purpose¹⁶⁴⁶. The 1958 conflict, despite its disappointments, bolstered intra-Arab solidarity as multiple Arab publics rose in the name of the same cause, while the PRM kept aglow the glamour and comradeship of Arab unity of purpose; solidarity further burnished by the intertwining of the PRM and Lebanese domestic movement¹⁶⁴⁷. Sunni-Lebanese support for the PRM became, as noted, the litmus test for measuring such unity of purpose. The final testament to the lingering attachment to Pan-Arab Nationalism was exhibited in the continuing fealty to Nasserist discourses and solidarities by the major Sunni-Lebanese militias during the *Two-Year War*: with names like the *Independent Nasserite Movement* [INM] and *Popular Nasserite Organisation* [PNO], these groups retained a markedly Pan-Arab Nationalist discursive ethos even as they embraced the ideological frames and objectives of the newly popularising Marxist ideological tendency¹⁶⁴⁸; a tendency which had itself popularised in part by grafting itself onto the dying body of Pan-Arab Nationalism (see below and Appendix B).

7.2.8. Disaffection and decline:

Disaffection occurred in stages:

Most immediately, Pan-Arab Nationalism was blunted by Nasser's own renegeing on incorporating Lebanon into the UAR, stopping dead Pan-Arab Nationalism's *raison d'être* for Lebanese Sunnis. Pan-Arab Nationalism faded because it lost potential for affecting change – ceasing to be an anti-establishment movement. This was compounded by the *zu'amā's* reacquiescence to the tweaked *status quo*. With its leadership now endorsing the establishment, the menu people had no option but to comply also, while HSC-

¹⁶⁴⁶ Ibid.

¹⁶⁴⁷ Ibid.

¹⁶⁴⁸ For example, in a 1977 interview, a spokesperson of the Beirut-based, Sunni-majority INM described itself as “a popular movement following the Nasserite ideology” encapsulated in the slogan “Freedom, Socialism, and Unity”, while clarifying that ideology in distinctly Marxist terms, saying “our ideology is a synthesis of two forces: Marxism [...] [and] idealism or liberalism [...] we characterise ourselves as [...] leftists nationalists [...] [preferring] right versus left nomenclature”. See: “Independent Nasserite Movement: Interview with Ziad Hafez”, *MERIP Reports* 61 (Oct., 1977): pp. 9-14. In his detailed exposition on the transition in Lebanon from Nasserist Pan-Arab Nationalism to Marxism, Dawisha asserts that such groups retained Arabism as an identity even as they transitioned to Marxist ideologies, but clarifies that “what continued to live on was Arabism not Arab nationalism. Arabism was merely the remnant of Arab nationalism, what the Arabs were left with after Arab nationalism hit the deck in June 1967 [...] What was left was no more than a sense of cultural proximity, an intellectual recognition of common habits and custom, a belief that something called ‘Arabism’ does indeed exist”. See: Dawisha, *Arab Nationalism*, 253-254.

VSC restoration made compliance once again acceptable. Nevertheless, Pan-Arab Nationalism retained strong emotive appeal, and its diagnostic and solidarity frames (if no longer the prognostic and strategic frames) endured for a period¹⁶⁴⁹.

Over the following decades, Pan-Arab Nationalism suffered multiple discrediting developments, further eroding Sunni-Lebanese faith in, and good will towards, the movement's self-proclaimed champions, and the prospects of Arab unification more generally. Firstly, the Pan-Arab Nationalist 'revolution' in Iraq, which had energised the Sunni-Lebanese menu people during the *Lebanese Crisis*, ended in disappointment when the new Iraqi government refused incorporation into the UAR¹⁶⁵⁰. Then, just three years after its formation, the UAR fractured, chiefly over Syrian discontent over Nasser's socialist reforms¹⁶⁵¹. Shortly thereafter, Egypt, far from fostering Arab unity of purpose, became embroiled in an intra-Arab proxy war over Yemen (1962-70)¹⁶⁵² while, in 1970 a second intra-Arab conflict erupted when Jordan violently ejected the PRM from its territory (the 'Black September' conflict)¹⁶⁵³. Finally, perhaps most catastrophically, the combined 'Arab Nationalist' defeat against Israel in 1967 prompted widespread accusations that the Arab regimes had put personal, material interests ahead of defeating Israel (and Arab unity of purpose more generally)¹⁶⁵⁴. This degraded Pan-Arab nationalism's strategic frames (in that Arab unification would not be brought about by the Arab regimes, who had sold their ideals for their own material, capitalist interests); its prognostic frames (in that Arab unity would still leave the Arab world blighted by those self-serving elites); its diagnostic frames (in that the problem was less external threats and Arab disunity and more the corruption of Arab elites); and solidarity frames (in that the enemy was, increasingly, the Arab elite, while the menu people could find more in common with non-Arab peoples also oppressed by their own elites corrupted by capitalism). Such evaluations played a substantial role in facilitating the popularisation of Marxism (see below)¹⁶⁵⁵.

¹⁶⁴⁹ As noted above.

¹⁶⁵⁰ Goldschmidt Jr., *A Concise History*, 309.

¹⁶⁵¹ Kramer, *Arab Nationalism*, 187.

¹⁶⁵² Goldschmidt Jr., *A Concise History*, 310-327.

¹⁶⁵³ Hirst, *Beware of Small States*, 86.

¹⁶⁵⁴ Ismael articulates this evaluation with particular clarity. He asserts that, after the 1967 War Pan-Arab Nationalists began "adopting Marxism-Leninism after concluding that the petty bourgeoisie [Arab Nationalist regimes] [and bourgeois Sunni-Lebanese zu'amā'] had abandoned all of its progressive roles and consequently become a counterrevolutionary force that was stifling the struggle and aspirations of the masses." See: Ismael, *The Arab Left*, 69.

¹⁶⁵⁵ Ibid.

Despite these setbacks, Pan-Arab Nationalism retained a strong emotional appeal, even as the discrediting of Pan-Arab Nationalism's ideological frames made way for other ideologies in the ideological marketplace (see below). Arab solidarity remained prominent, but became stratified, both by a secondary affiliation with non—Arab peoples similarly oppressed by capitalism and imperialism, and in an excommunication of the Arab political and socioeconomic elite from that Arab solidarity. However, developments throughout the period of the Two-Year war (1975-6) and broader Lebanese civil war (1976-1990) would destroy all remaining Sunni-Lebanese Pan-Arab Nationalist sentiment:

Firstly, the Lebanese civil war saw several betrayals to Arab unity of purpose. Syria, a long-time flagbearer of Arab Nationalism, intervened *against* the discursively Arab Nationalist¹⁶⁵⁶-cum-Marxist LNM-PRM forces¹⁶⁵⁷ before engaging in a repressive occupation biased against the PRM and the Sunni-Lebanese community¹⁶⁵⁸. Competing 'Arab nationalist' states, meanwhile, used the war as an arena for their own disputes and rivalries against one another, with Syria, Iraq, and Libya backing rival groups in the war¹⁶⁵⁹. Finally, the futility and hollowness of Arab unity of purpose was demonstrated when not a single Arab state came to the aid of Lebanon when the country was invaded by Israel in 1982¹⁶⁶⁰.

Additionally, the Sunni-Lebanese community experienced bitter intra-Arab fighting - whether against Syrian occupying forces, Lebanese Shi'as, Alawites, Druzes, and even fellow Sunnis (both Palestinian and Lebanese)¹⁶⁶¹, destroying the feelings of Arab solidarity and brotherhood that had characterised the pre-war period as they grew accustomed to viewing other Arabs as enemies, and pushing the Sunni-Lebanese community into an enclavist mentality that would manifest,

¹⁶⁵⁶ As above – while ideological framings and objectives were distinctively Marxist by this time, many Sunni-Lebanese factions retained a Nasserist Pan-Arab Nationalist discursive ethos as a fundamental part of their identity.

¹⁶⁵⁷ Hirst, *Beware of Small States*, 113.

¹⁶⁵⁸ Gade provided a particularly detailed analyses of Syria's occupation of Lebanon and its impact on the Sunnī-Lebanese community, see: Gade, "Sunni Islamists"; and Gade, "Return to Tripoli".

¹⁶⁵⁹ El-Khazen provides a telling table noting the different foreign backers of the various militia groups operating in Lebanon's civil-war. Various anti-establishment groups received support variously from Iraq, Libya, Syria, Egypt, Algeria, Saudi Arabia, Qatar, Kuwait, alongside the USSR and East Germany, see: Farid el-Khazen, *The Breakdown of the State*, 303. Following Iran's 1979 Revolution, the New Iranian Islamic Republic also began sponsoring both Sunnī and Shi'ite Islamist groups, see: Gade, *Return to Tripoli*, 42.

¹⁶⁶⁰ Goldschmidt Jr., *A Concise History*, 378.

¹⁶⁶¹ This is discussed and referenced in greater detail in the next section.

in the post-war era, in a distinctly Sunni-Lebanese confessional-national group identity¹⁶⁶².

The Sunni-Lebanese menu people's jettisoning of Pan-Arab Nationalist ideological sentiment is well attested in anecdotal and quantitative data. One poll recorded that, following the civil-war, only 3% of Lebanese Sunnis still advocated union with Syria¹⁶⁶³. As the war progressed, Lebanon's Sunnis increasingly lost faith in their Arab nationalist (and Leftist¹⁶⁶⁴) ideals, and sought salvation instead through confessional communal enclavism, or the newly emergent ideology of Islamism (see Section 7.4.). The post-war period was characterised by Sunni-Lebanese animosity towards the discredited former leaders of Arab nationalism – particularly Syria - and a turn towards the conservative Muslim states (notably the anti-Arabist Saudi Arabia) and even the West (see below). Their zu'amā', meanwhile, discredited in the pre-Two-Year War HSC-VSC breakdown, were afforded a chance to reassert themselves, to such an extent that they were able to turn the Sunni-Lebanese menu people against their erstwhile Palestinian comrades¹⁶⁶⁵.

7.3. Marxism:

7.3.1. Conception:

Like nationalism, Marxism was consciously imported from Europe. Marxism, alongside non-Marxist socialist trends, developed from a confluence of critiques of late feudalism and industrialisation; the energisation of the same enlightenment rationalism - politicised during the French Revolution – that propelled contractarian nationalism¹⁶⁶⁶; and the trial-and-error expansion and refinement of its theoretical and strategic tenets in response to the challenges

¹⁶⁶² Ibid.

¹⁶⁶³ Gambil, "Islamist Groups," 44. The decline of Arab nationalist aspirations is perhaps best expressed in the numerous post-war surveys reporting an increasing tendency for Lebanese Sunnis to identify primarily as Lebanese (and Muslim) and only secondarily as Arab. For example, in a 2008 poll, only 6% of Sunnis reported identifying primarily as 'Arab', compared to 62% identifying primarily as 'Lebanese' and 31% as 'Muslim'; see: Mansoor Moaddel, et al., "Sectarianism and Counter-Sectarianism in Lebanon," *Population Studies Center*, Research Report 12-757 (May 2012), 19.

¹⁶⁶⁴ See below.

¹⁶⁶⁵ As discussed in the next section.

¹⁶⁶⁶ Billington goes so far as to assert that nationalism and socialism sprung as sibling ideologies from "a basic schism within the [French] revolutionary faith between those who believed most in fraternity (that the nation was the vehicle of deliverance) and those who believed in equality (that a social class was the vehicle of deliverance)" (Billington, *Fire in the Minds of Men*, vii). Other helpful overviews can be found in: Lindemann, *A History of European Socialism*; Sabry, *The development of Socialism*; and Hobsbawm, *The Age of Capital*.

encountered by European Marxist activists¹⁶⁶⁷. The dialectical development of Marxism and its competitors was aided by the 1864 establishment of the *International Workingmen's Association* [aka the *Communist First International*], under which Marxist and non-Marxist socialists convened to debate theory and strategy¹⁶⁶⁸, along with the written outputs of its many theorists¹⁶⁶⁹. While not monolithic, Arab Marxism was almost entirely based on *Marxism-Leninism*, the emancipatory credentials of which were demonstrated by the Russian 1917 *October Revolution* and its reverberations across Europe¹⁶⁷⁰.

Doctrinally, Marxism found little to offer the Arab world, with its minute industrial sector and proletariat¹⁶⁷¹ and complex social-political relations uncatered for by Eurocentric Marxist theorising¹⁶⁷². What appears to have given it initial currency was 1) its models/nomenclature for conceptualising social relations between exploited and exploiter (and, increasingly, imperialist) classes; and 2) the apparent vitality of the Marxist-Leninist mode of emancipation/liberation demonstrated by the October revolution¹⁶⁷³.

7.3.2. Indigenisation:

Marxist ideas were imported and exported from Europe into the Arab world/Middle East:

Its importing began prior to World War One, where Marx and Engels' ideas were circulated among European diaspora members residing in the Ottoman lands and British-occupied Egypt¹⁶⁷⁴ and among indigenous Christian minorities who, for various reasons, often possessed greater linguistic access to as-yet-

¹⁶⁶⁷ As discussed in Chapter 2.

¹⁶⁶⁸ The *International Workingmen's Association* brought together, in often fiery debates, such diverse forces as radical-liberal trade unionists, *Chartists* and *Owenites* from England, mutualist *Proudhonists* and social revolutionary *Blanquists* from France, nationalist revolutionaries from Poland, Ireland, and Italy, the *Social Democratic Workers Party* from Germany, and various anarchist movements and personalities, particularly from Russia but also Spain and Italy. See: Lindemann, *A History of European Socialism*, 121-122; Hobsbawm, *The Age of Capital*, 136-138; Sabry, *The development of Socialism*, 11-14; Gildea, *Barricades and Borders*, 220-224.

¹⁶⁶⁹ Most consequently in the Arab world, the works of Marx and Engels, and Lenin – see below.

¹⁶⁷⁰ See below.

¹⁶⁷¹ Suleiman, "The Lebanese Communist Party," 145; Michael W. Suleiman, "Crisis and Revolution in Lebanon," *Middle East Journal* 26(1) (Winter 1972), 14; Ismael, *The Communist Movement*, 2-3.

¹⁶⁷² Ismael, *The Communist Movement*, 2-3.

¹⁶⁷³ See below.

¹⁶⁷⁴ Johan Franzén, "Communism in the Arab World and Iran," in *The Cambridge History of Communism: Vol. II: The Socialist Camp and World Power 1941-1960s*, eds. Norman Naimark, Silvio Pons and Sophie Quinn-Judge (Cambridge, New York, Melbourne and Delhi: Cambridge University Press, 2017), 544.

untranslated-into-Arabic Marxist texts¹⁶⁷⁵. This diffusion manifested in the proliferation of unions in certain urban centres (particularly Egypt and Turkey) and literary salons in Istanbul, Beirut, and Egypt, with European economic intrusion being the chief object of their ire¹⁶⁷⁶. Post-World War One, importing of socialist ideas – both Marxist and broader French Revolutionary egalitarian ideas¹⁶⁷⁷ – accelerated, both in response to the above-noted wartime Ottoman abuses and the onset of direct colonialism¹⁶⁷⁸, and in response to the Russian revolution, which seemed to demonstrate the vitality of the Marxist-Leninist mode of emancipation¹⁶⁷⁹.

The Bolsheviks sought to export Marxism-Leninism to colonised territories, assessing the colonies to be the centre-of-gravity for the West's unexpected resilience to communism¹⁶⁸⁰. However, such outreach appears to have been inconsequential in the CPL's formation, the group's predecessor – the *Lebanese People's Party* [LPP] – being established in part out of suspicion towards the Soviet-directed *Communist Party of Palestine's* efforts to establish a formal branch of the Communist Party in Lebanon¹⁶⁸¹.

7.3.3. 'Salonisation':

Marxism thus 'salonised' in Lebanon prior to World War One – preoccupying various intellectual circles in Beirut and Mount Lebanon¹⁶⁸². Following the war this salonisation became institutionalised as Marxism started being discussed

¹⁶⁷⁵ Ibid, 545 & 553.

¹⁶⁷⁶ Salem, *Bitter Legacy*, 149; Ismael, *The Communist Movement*, 3; Hanssen, "Communism in the Middle East," 199 & 203.

¹⁶⁷⁷ The Lebanese 'importers' of Socialist thought were particularly inspired by French Revolutionary egalitarian humanism alongside Marxism-Leninism – see: Ismael and Ismael, *The Communist Movement in Syria and Lebanon*, 4; Hussein Yacoub, "The Lebanese Left: The Possibility of the Impossible," in *Mapping of the Arab Left: Contemporary Leftist Politics in the Arab East*, eds. Jamil Hilal, and Katja Hermann, trans. Ubab Murab (Ramallah, Palestine: Rosa Luxemburg Stiftung Regional Office Palestine, 2014), 84.

¹⁶⁷⁸ Ismael and Ismael, *The Communist Movement in Syria and Lebanon*, 5; Suleiman, "The Lebanese Communist Party," 135; Baun, *Winning Lebanon*, 25.

¹⁶⁷⁹ Ismael and Ismael, *The Communist Movement in Syria and Lebanon*, 4; Rosa Velasco Muñoz, "The Lebanese Communist Party: Continuity against all odds," in *Communist Parties in the Middle East: 100 Years of History*, eds. Laura Felio and Ferran Izquierdo-Brichs (Oxon and New York: Routledge, 2019), 93; Sune Haugbolle, "Social Boundaries and Secularism in the Lebanese Left," *Mediterranean Politics* 18(3) (2013), 343; Suleiman, "The Lebanese Communist Party," 136; Baun, *Winning Lebanon*, 25; Salem, *Bitter Legacy*, 149-150; Ismael, *The Communist Movement*, 4; Yacoub, "The Lebanese Left," 84.

¹⁶⁸⁰ The logic being that the colonies provided Western governments fiscal-strategic depth with which they could prop up capitalism's contradictions (Hanssen, "Communism in the Middle East," 200).

¹⁶⁸¹ Suleiman, "The Lebanese Communist Party," 136; Salem, *Bitter Legacy*, 151.

¹⁶⁸² Salem, *Bitter Legacy*, 148.

concertedly through several publications, particularly the *Wondering Journalist*, founded in 1922 by individuals later instrumental in the LLP's and CPL's founding¹⁶⁸³. This was followed by *Humanity* – established in 1925 as the CPL's official organ¹⁶⁸⁴. The founders and contributors were predominantly middle and upper-class intellectuals who identified as Marxist-Leninist 'revolutionary vanguards' and considered journals as key instruments for diffusing Marxism-Leninism in Lebanon¹⁶⁸⁵.

7.3.4. 'Vanguardisation':

The Lebanese Marxist tendency endured three vanguard periods, finally succeeding in popularising on its third attempt in the run up to the Two-Year War:

7.3.4.1. *First vanguard: Ottoman collapse and colonial rule (c. 1924-25):*

The Lebanese Marxist tendency's first vanguard was brief, becoming embroiled in an unsuccessful ideological competition almost immediately and, just as quickly, suffering the major setback of seeing its entire leadership decapitated through imprisonment¹⁶⁸⁶:

In 1924, contributors to the *Wondering Journalist* formed the LPP and, in a subsequent Beirut rally, assumed leadership over several trade unions, leading them in demanding from the French authorities various workers' rights and protections¹⁶⁸⁷. In October, the LLP merged with the Armenian Communist *Spartacist League*, becoming the CPL¹⁶⁸⁸. Their inaugural meeting brought union workers together with the group's intellectual cadres and committed itself to promoting French Revolutionary ideals: liberty, equality, and fraternity¹⁶⁸⁹. At this stage, the CPL little interested the Sunni menu people, remaining largely intellectual in composition and output (its orthodox Marxist propaganda being abstract and struggling to make itself relevant in the Lebanese setting)¹⁶⁹⁰ as well

¹⁶⁸³ Ismael and Ismael, *The Communist Movement in Syria and Lebanon*, 5; Muñoz, "The Lebanese Communist Party," 92; Suleiman, "The Lebanese Communist Party," 135; Baun, *Winning Lebanon*, 25.

¹⁶⁸⁴ Baun, *Winning Lebanon*, 27.

¹⁶⁸⁵ Suleiman, "The Lebanese Communist Party," 136; Muñoz, "The Lebanese Communist Party," 93-94.

¹⁶⁸⁶ See Appendix B.

¹⁶⁸⁷ Baun, *Winning Lebanon*, 27.

¹⁶⁸⁸ Suleiman, "The Lebanese Communist Party," 137; Salem, *Bitter Legacy*, 151; Franzén, "Communism in the Arab World," 556; Yacoub, "The Lebanese Left," 84.

¹⁶⁸⁹ Yacoub, "The Lebanese Left," 84.

¹⁶⁹⁰ Salem, *Bitter Legacy*, 150-153.

as comprising mostly religious and ethnic minorities (predominantly Kurds and Armenian Christians)¹⁶⁹¹.

In 1925 the CPL attempted to burnish its emancipatory credentials by proclaiming support for the Syrian revolt¹⁶⁹². However, the party leadership was promptly imprisoned by the French authorities and its papers shut down, resulting in its early bowing-out from its first ideological competition¹⁶⁹³.

7.3.4.2. *Second vanguard: ideological fine-tuning (c. 1928-1958):*

The CPL's second vanguard period was long and painful, oscillating between advances and setbacks, characterised by constant platform/policy changes as it deferred to the capricious Stalinist Comintern.

This period commenced in 1928 with the freeing of the CPL's leadership by French amnesty¹⁶⁹⁴. That same year, the CPL joined the Comintern¹⁶⁹⁵ and, broadly, deferred to its directives, to its detriment. The CPL opened several new branches across Lebanon – including an influential one in Sunni-dominated Tripoli¹⁶⁹⁶ – and acquired influence over many labour unions, frequently leading them in within-establishment industrial action to improve workers' rights and protections¹⁶⁹⁷ and, sporadically (chiefly in 1931¹⁶⁹⁸ and 1944-1946¹⁶⁹⁹), anti-establishment demands for Lebanese independence. These activities, through which it began building firm emancipatory credentials, were frequently disrupted by its obedience to Comintern directives which diminished these credentials: 1) commanding cooperation with the hated French colonial authorities as a popular front against Fascism¹⁷⁰⁰; 2) urging sanitisation of its platform to engender cooperation with the bourgeois/petit-bourgeois classes towards this same end (to

¹⁶⁹¹ Ibid.

¹⁶⁹² Ismael and Ismael, *The Communist Movement in Syria and Lebanon*, 13; Muñoz, "The Lebanese Communist Party," 95; Suleiman, "The Lebanese Communist Party," 137; Baun, *Winning Lebanon*, 29; Franzén, "Communism in the Arab World," 556.

¹⁶⁹³ Ibid.

¹⁶⁹⁴ Ibid.

¹⁶⁹⁵ Muñoz, "The Lebanese Communist Party," 95; Salem, *Bitter Legacy*, 153; Hanssen, "Communism in the Middle East," 209.

¹⁶⁹⁶ Suleiman, "The Lebanese Communist Party," 138.

¹⁶⁹⁷ Yacoub, "The Lebanese Left," 86; Ismael and Ismael, *The Communist Movement in Syria and Lebanon*, 18.

¹⁶⁹⁸ Khayat, "The Left," 26-27.

¹⁶⁹⁹ Suleiman, "The Lebanese Communist Party," 149; Kardahji, "A Deal with the Devil," 139; Salem, *Bitter Legacy*, 155.

¹⁷⁰⁰ Ismael and Ismael, *The Communist Movement in Syria and Lebanon*, 29; Suleiman, "The Lebanese Communist Party," 149; Salem, *Bitter Legacy*, 153; Hanssen, "Communism in the Middle East," 209; Yacoub, "The Lebanese Left," 85; Kardahji, "A Deal with the Devil," 140.

the extent that it no longer offered any tangible anti-establishment potential)¹⁷⁰¹; and 3) commanding endorsement of Palestine's 1947 partition. This final decision was particularly damaging; making the CPL appear a Soviet stooge (it having previously opposed partition)¹⁷⁰² and granting the zu' amā' fuel for demonising and banning the party (and usurping its control over the unions)¹⁷⁰³, driving it underground until 1971¹⁷⁰⁴. It thus entered its second ideological competition – the 1958 *Lebanese Crisis* – from a position of weakness and, as we have seen, succeeded in playing only a local administrative role in the conflict, with little ideological influence.

7.3.4.3. *Third vanguard: prelude to the Two-Year War (c. 1965-1975):*

The Marxist tendency's third vanguard began in 1965, when Druze za'im Kamal Jumblatt convened his PSP with the ANM and CPL to provide organisational assistance and ideological direction to the domestic protest movement¹⁷⁰⁵. This socialistic alignment of interests was aided by Nasser's post-1958 socialist discursive turn¹⁷⁰⁶ (Jumblatt and the ANM both being staunch supporters of Nasser¹⁷⁰⁷) coupled with a CPL internal reformation driven by a new generation critical of its previous stances¹⁷⁰⁸ and seeking to broaden its influence by 1) allying with other movements¹⁷⁰⁹, 2) championing the domestic protest movement¹⁷¹⁰ and, after 1967, 3) unreservedly supporting the PRM¹⁷¹¹. Similarly,

¹⁷⁰¹ Kardahji, "A Deal with the Devil," 140; Ismael and Ismael, *The Communist Movement in Syria and Lebanon*, 37; Suleiman, "The Lebanese Communist Party," 140 & 147; Sune Haugbolle, "Dealing with Dissent: Khalid Bakdash and the schisms of Arab Communism," in *The Arab Lefts: Histories and Legacies, 1950s–1970s*, ed. Laure Guirguis (Edinburgh: Edinburgh University Press, 2020), 85.

¹⁷⁰² Khayat, "The Left," 42; Suleiman, "The Lebanese Communist Party," 153; Haugbolle, "Dealing with Dissent," 84-88; Hanssen, "Communism in the Middle East," 212; Yacoub, "The Lebanese Left," 85; Kanaan, *Lebanon 1860-1960*, 209.

¹⁷⁰³ Ismael and Ismael, *The Communist Movement in Syria and Lebanon*, 39; Salem, *Bitter Legacy*, 159; Franzén, "Communism in the Arab World," 560; Kardahji, "A Deal with the Devil," 150.

¹⁷⁰⁴ See below.

¹⁷⁰⁵ Traboulsi, *A History of Modern Lebanon*, 148.

¹⁷⁰⁶ Ismael, *The Arab Left*, 81; Quandt, "Palestinian Nationalism," 54.

¹⁷⁰⁷ Hazran, "Lebanon's Revolutionary Era," 157; Abu-Khalil, "George Habash"; Petran, *The Struggle*, 46; Ismael, *The Arab Left*, 64-65.

¹⁷⁰⁸ Khayat, "The Left," 130; Guirguis, "The New Left," 260; Picard, *Lebanon*, 100; Ismael and Ismael, *The Communist Movement in Syria and Lebanon*, 81; Marwan George Rowayheb, "Lebanese Militias: A New Perspective," *Middle East Studies* 42(2) (Mar., 2006), 307.

¹⁷⁰⁹ Khayat, "The Left," 30; Ismael and Ismael, *The Communist Movement in Syria and Lebanon*, 83.

¹⁷¹⁰ Khayat, "The Left," 30; Picard, *Lebanon*, 100; Hitti, "The Republic of Lebanon," 222.

¹⁷¹¹ el Khazen, *The Breakdown of the State*, 74; Khayat, "The Left," 31; Hanf, *Coexistence*, 187; Petran, *The Struggle*, 144.

following the 1967 combined Arab defeat by Israel (which, as noted, prompted a Marxist-turn among many Pan-Arab Nationalists), several key factions – notably the ANM, SSNP and pro-Syrian Ba’ath Party – reappraised their ideological stances: the ANM splintering into several radical Marxist-Leninist factions¹⁷¹²; the SSNP committing to cooperation with leftist factions and supporting the PRM¹⁷¹³, and the pro-Syrian Ba’ath splintering with the formation of the Marxist-Leninist *Socialist Lebanon*, which would itself form the basis for several armed Marxist factions¹⁷¹⁴. Crucially, these factions were united – for the first time – by Jumblatt (under the LNM)¹⁷¹⁵ who, using his authority as Interior Minister, legalised them in 1971¹⁷¹⁶. This unified entity raised its profile and burnished its emancipatory credentials by championing and coordinating – and eventually protecting – the domestic protest movement¹⁷¹⁷, and providing moral and armed support to the PRM in its battles with the LAF and Maronite militias¹⁷¹⁸. The PRM – which incorporated the ANM’s splinter factions alongside factions of the PLO – simultaneously established itself as a standard bearer for the Marxist tendency, its activities and objectives blurring with the LNM’s, as we have seen. Together, the LNM and PRM entered the ideological competition leading up to the Two-Year War, succeeding in broadly monopolising Sunni-Lebanese anti-establishment sentiment at this time.

7.3.5. HSC-VSC breakdown and the opening of the ‘ideological field’:

The Marxist tendency’s first two ideological competitions were unsuccessful, losing out to the Pan-Arab Nationalist and Pan-Islamist tendencies during the anti-colonial struggles of the 1920s and struggling to compete with Pan-Arab Nationalism in 1958. Its third, successful ideological competition – which pitted it against a fading Pan-Arab Nationalism and a fledgling Islamist tendency – saw it finally popularise, almost completely monopolising anti-establishment sentiments

¹⁷¹² Most famously the PFLP, DPFLP and PFLP-GC. For helpful overviews of these groups and their differences, see Quandt, “Palestinian Nationalism”; and Gérard Chaliand, *The Palestinian Resistance* (Harmondsworth, Baltimore, MA., and Victoria, Aus: Penguin Books, 1972).

¹⁷¹³ El Khazen, *The Breakdown of the State*, 74.

¹⁷¹⁴ Deeb, *The Lebanese Civil War*, 63.

¹⁷¹⁵ Khayat, “The Left,” 59; Hazran, “Lebanon’s Revolutionary Era,” 167.

¹⁷¹⁶ Traboulsi, *A History of Modern Lebanon*, 156; al-Khazen, “Kamal Jumblatt,” 181; Naor, “The Quest,” 999; Hazran, “Lebanon’s Revolutionary Era,” 167.

¹⁷¹⁷ Khayat, “The Left,” 30; Traboulsi, *A History of Modern Lebanon*, 148; Petran, *The Struggle*, 83.

¹⁷¹⁸ Khayat, “The Left,” 31; Rami Siklawi, “The dynamics of Palestinian political endurance in Lebanon,” *Middle East Journal* 64(4) (Autumn 2010), 61; Hanf, *Coexistence*, 87; Petran, *The Struggle*, 144.

among the Sunni menu people. As before, these competitions are all outlined in Appendix B.

7.3.6. Momentum:

By the Two-Year War's outbreak, the LNM-PRM had become the monopolising force for Sunni-Lebanese anti-establishment militants, excluding two small Islamist militias (see next section), who promptly disbanded due to their inability to significantly influence the anti-establishment movement's ideological trajectory and objectives¹⁷¹⁹. The LNM-PRM alliance united around a broadly Marxist ideological outlook, which clearly delineated friend from foe and why, and directed and facilitated remedial action. It thus became an encompassing framework through which the menu people understood the events and experiences of the HSC-VSC breakdown leading to the Two-Year War and articulated and directed their anger. As noted, Lebanon's Marxist ideological tendency was non-monolithic, however, for most of the menu people, specifics were unimportant – they joined the faction local to them, generally following their neighbourhood's Qabaday. For example, most Beirut Sunnis joined the INM¹⁷²⁰, the *Arab Socialist Union in Lebanon* [ASUL]¹⁷²¹, or the *Association of Popular Committees* [APC]¹⁷²²; Sidonese joined the PNO¹⁷²³; while different districts of Tripoli were broadly monopolised by the *October 24th Movement*¹⁷²⁴, the *Pro-Syrian Ba'ath Party*¹⁷²⁵, the *Pro-Iraqi Ba'ath Party*¹⁷²⁶, the ASAP¹⁷²⁷, and the CPL¹⁷²⁸.

7.3.7. Attachment:

The Marxist tendency fostered attachment through several dynamics:

Firstly, tendency's class analyses were reified by the contrasts observable between LNM-PRM activists and Sunni zu' amā': the former heroically risking life

¹⁷¹⁹ See next section.

¹⁷²⁰ Badran, *Lebanon's Militia Wars*, 193.

¹⁷²¹ Deeb, *The Lebanese Civil War*, 68.

¹⁷²² Rowayheb, "Lebanese Militias," 113.

¹⁷²³ Deeb, *The Lebanese Civil War*, 69; Khayat, *The Left*, 22; Badran, *Lebanon's Militia Wars*, 170.

¹⁷²⁴ Rayyar Marron, *Humanitarian Rackets and Their Moral Hazards: The Case of the Palestinian Refugee Camps in Lebanon* (London and New York: Routledge, 2016), 77; Yezid Sayigh, *Armed Struggle and the Search for State: The Palestinian National Movement, 1949-1993* (Oxford: Clarendon Press, 1997), 191.

¹⁷²⁵ Deeb, *The Lebanese Civil War*, 68; Hanf, *Coexistence*, 77.

¹⁷²⁶ Rabinovich, *The War for Lebanon*, 79.

¹⁷²⁷ Khayat, *The Left: Can it be right for Lebanon?*, 20.

¹⁷²⁸ Rowayheb, *Lebanese Militias*, 307; Deeb, *The Lebanese Civil War*, 66.

and liberty to protect the Palestinians and stand up for the domestic movement, while the latter were apathetic at best, and antagonistic at worse, failing to prevent Maronite/Presidential/LAF abuses against the PRM, actively aiding in the repression of the domestic movement and, upon the war's commencement, failing to champion the interests of their constituents, instead striving to salvage the system that protected their privileges at their constituents' expense.

Secondly, while the zu'amā' alienated themselves, the Marxist tendency accumulated prototypical leaders and heroes - both within Lebanon and globally – from elites sacrificing their own privileges for the good of the people (Jumblatt in Lebanon, third worldist revolutionaries more broadly), to individual fighters sacrificing all for the cause – either in the LNM-PRM, the Viet Cong, FLN, etc.

Thirdly, as with Pan-Arab Nationalism in 1958, fighters grew accustomed to experiencing comradeship with fellow identifying Marxists, and to experiencing conflict with those who opposed it – from the zu'amā' to the (perceivably) wealthier Maronite elite people who seemed intent on maintaining their privileges at the expense of the non-Maronite majority.

Finally, the Marxist tendency cultivated an enchanting aesthetic and shared universe of meaning – in which fighters received positive identity information by identifying with glamorous, upstanding heroes like Che Guevara or Palestinian Fedayeen etc., and, more broadly, a dichotomised moral universe offering identification as un-ambiguous heroic victims against a clear oppressor class.

7.3.8. Disaffection and decline:

The Marxist tendency suffered rapid disaffection and decline during the civil war, for several reasons:

Firstly, despite rapid initial military gains, the LNM-PRM failed to implement its Marxist ideological vision in areas under its control, largely because of 1) disagreement over advanced prognoses¹⁷²⁹; and 2) a strategic decision not to usurp the state's prerogatives in hope of winning the latter's ascent¹⁷³⁰. This neglect transformed into negation from 1977. After Kamal Jumblatt was assassinated (see below), his son, Walid Jumblatt, assumed command of the LNM, relinquishing much of its socialist reform agenda and becoming

¹⁷²⁹ Chalcraft, *Popular Politics*, 385.

¹⁷³⁰ Petran, *Struggle*, 271.

increasingly sectarian and pro-Syrian¹⁷³¹. Thus, it no longer represented the ideological vision it once exemplified, leaving its followers without leadership, cohesion, or organisation.

Furthering this loss of leadership, cohesion, and organisation, the LNM-PRM fragmented upon Syria's intervention and occupation. It began haemorrhaging Shi'a fighters almost immediately to the emergent *Amal*, an explicitly Shi'a movement catering specifically for Shi'a needs and grievances (something, *Amal's* leaders alleged, that could not be entrusted to the LNM-PRM)¹⁷³² and, by the late 1970s, was in active conflict with the group¹⁷³³. What remained of the LNM-PRM fractured into pro- and anti-Syrian camps (especially after the Syrian-orchestrated assassination of the unifying Jumblatt), resulting in sustained internal fighting, the latter typically gaining the upper hand thanks to Syrian support¹⁷³⁴. Worse still, pro-Syrian factions – including the increasingly sectarian Druze PSP – turned on the Sunni community, virtually destroying Sunni military representation in Beirut and Tripoli and finalising the sense of alienation between the Sunni men and the still ostensibly-Marxist movement¹⁷³⁵.

Thirdly, many important movement personalities discredited themselves by acting in distinctly-un-Marxist ways – often peddling corruption, warlordism, and gangsterism, and living ostentatiously lavish lifestyles¹⁷³⁶. For the PRM, such discrediting behaviour was coupled by popular accusations – encouraged by the

¹⁷³¹ Khayat, *The Left*, 61; and Yacoub, *The Lebanese Left*, 86.

¹⁷³² *Amal's* leaders demonised for LNM – citing its lingering Nasserist Pan-Arab Nationalist discursive ethos as evidence of its secret Sunni chauvinism (Mackey, *Lebanon*, 80). Similarly it demonised the PRM for its alleged thuggish behaviour in Shi'a villages, and its reckless provocation of Israeli retaliation which, disproportionately, hit those villages (Khalil, *Druze, Sunni and Shiite Political Leadership*, 47).

¹⁷³³ Traboulsi, *History of Modern Lebanon*, 220.

¹⁷³⁴ The Syrian occupying forces were active in fragmenting the LNM-PRM by drawing its constituent factions into Syrian-aligned coalitions that then engaged any groups who refused to comply. For examples, see: Khalil, *Druze, Sunni and Shiite Political Leadership*, 37; Johnson, *Class and Client*, 196; Gade, *Sunni Islamists*, 42; Deeb, *The Lebanese Civil War*, 68; and Siklawi, *Palestinian Political Endurance*, 609.

¹⁷³⁵ Of greatest consequence was the 1984 battle of West Beirut, in which Syria deployed its clients – the PSP and *Amal* – against *al-Murabitun* (the main Sunni-dominated militia in Beirut) (Khalil, *Druze, Sunni and Shiite Political Leadership*, 40) and the 1985 battle of Tripoli, in which a Syrian-marshalled coalition of leftist, Pan-Arab and Pan-Syrian militias crushed the main Sunni militia (*al-Tawhid* – see below) there (Robert G. Rabil, *Religion, National Identity, and Confessional Politics in Lebanon: The Challenge of Islamism* (New York: Palgrave Macmillan, 2011), 52).

¹⁷³⁶ Khalil, *Druze, Sunni and Shiite Political Leadership*, 40; see also: Hirst, *Beware Small States*, 130; Petran, *Struggle*, 271; Gilmour, *Lebanon*, 170; Abu Khalil, "Druze, Sunni and Shiite," 37.

Sunni zu ‘amā’ – that they had used Lebanon for their own ends, with little regard for the population’s suffering¹⁷³⁷.

Fourthly, remaining Marxist factions were co-opted by the now hated Syrian occupation forces (not least LNM leader, Walid Jumblatt¹⁷³⁸). As well as being deployed against the Sunni community, co-opted groups were forced to jettison their socialist agendas, becoming Syrian pawns in exchange for potential Syrian assistance defeating the Maronites¹⁷³⁹. Indeed, by the 1980s the CPL was considered by many to be a front for Syrian intelligence agencies¹⁷⁴⁰.

Finally, attempts by some Marxist factions to save face following the LNM-PRM’s disintegration by redeploying to repel the 1982 Israeli invasion¹⁷⁴¹ were obstructed by Syria’s barring of all but Hezbollah from participating in anti-Israel operations, and forced disbandment of those remaining Marxist groups who refused co-optation¹⁷⁴². Meanwhile, PRM factions who refused Syrian co-optation (chiefly Fatah) were ejected from Lebanon, by machination of the Syrian occupying forces and Sunni zu ‘amā’, in the wake of the Israeli invasion, depriving the Sunni community of its most powerful Sunni representation¹⁷⁴³.

By the civil war’s end, Lebanese Marxism had been relegated to a marginalised intellectual movement¹⁷⁴⁴, losing its ‘rational hedgers’ and many of its ‘rational zealots’ to Sunni enclavist or Islamist factions¹⁷⁴⁵ and regressing to the salon/early vanguard phase.

LNM collapse and anti-Syrian PRM ejection left the Sunni menu people without unified leadership and surrounded by enemies, many of them erstwhile allies (notably the Shi’a, Druze, pro-Syrian PRM, etc.). The Sunni menu people

¹⁷³⁷ Kliot argues that this view was held by the majority of Lebanese by the beginning of the 1980s (Kliot, “The Collapse,” 501) and by 1984 the Sidon-based, Sunni-majority PNO was in open warfare with its Palestinian former allies (Winslow, *Lebanon*, 253). See also: Rashid I. Khalidi, “Lebanon in the context of regional politics: Palestinian and Syrian involvement in the Lebanese crisis,” *Third World Quarterly* 7(3) (Jul., 1985), 501; Meier, “The Palestinian Fidâ’i,” 331; Abu Khalil, “Druze, Sunni and Shiite,” 37; Rashid Khalidi, *Under Siege: PLO Decisionmaking during the 1982 War* (New York: Columbia University Press, 1986), 29.

¹⁷³⁸ See footnote 1894 above.

¹⁷³⁹ Khayat, *The Left*, 94.

¹⁷⁴⁰ Ibid.

¹⁷⁴¹ The CPL, CAO and ASAP re-coalesced under the Lebanese National Resistance Front for this purpose. See: Khayat, *The Left*, 86.

¹⁷⁴² Yacoub, *The Lebanese Left*, 88; Salloukh et al., *The Politics of*, 27.

¹⁷⁴³ Roger Owen, “The Lebanese Crisis: Fragmentation or Reconciliation?” *Third World Quarterly* 6(4) (1984), 939; Khalidi, “Lebanon,” 497; Siklawi, “The Palestinian Resistance,” 933.

¹⁷⁴⁴ Yacoub, *The Lebanese Left*, 90.

¹⁷⁴⁵ See below.

responded by retreating into a reactive Sunni enclavism, clinging to their local neighbourhoods and defending them against outsiders¹⁷⁴⁶. Leadership atomised into the hands of local Qabadayat and Sheikhs¹⁷⁴⁷, each of whom espoused varying ideologies with little conviction or understanding - ideological discourses serving primarily to express and cement neighbourhood solidarity against outsiders rather than promoting certain diagnoses and prognoses¹⁷⁴⁸. One exception occurred in Tripoli, where the Marxist tendency's de-popularisation resulted in local Marxist factions reorganising under a newly-popularising ideology: Islamism (see next section). Finally, while local command fell to these Qabadayat and Sheikhs, some semblance of broader Sunni leadership (its reach uncertain, uneven, and fluctuating) was assumed by a resurgent Sunni zu'amā'¹⁷⁴⁹ and a previously apolitical Sunni religious establishment (*Dar al-Fatwa*, under Grand Mufti Khaled Hassan)¹⁷⁵⁰. This new leadership shaped the menu people's post-war Sunni-Lebanese nationalism, as outlined in chapter 6.

7.4. Islamism:

7.4.1. Conception:

As an ideological impulse, Islamism has existed throughout Islamic history¹⁷⁵¹. Pre-modern Muslim scholars noted the tendency for puritanical revivalist

¹⁷⁴⁶ This is an analysis shared by Rougier, who characterises Sunni Lebanese Islamist militants during this period as "muqatil": "an attitude of local defiance toward external aggression. He lacks a sophisticated ideology, drawing his identity instead from his concrete environment and conceptualising his fight as against an alien intruder." See: Rougier, *The Sunni tragedy*, xix and 34. See also: Abu Khalil, "Druze, Sunni and Shiite".

¹⁷⁴⁷ Ibid.

¹⁷⁴⁸ Johnson argues, most such leaders possessed only "the vaguest idea of the ideology they purported to promote" (Johnson, *Class and Client*, 200) while Khalaf and Denooux argue that such ideological espousals were merely used as social capital as each Qabaday or Sheikh attempted to one-up potential revivals in demonstrates of "ideological purity" (Khalaf and Denooux, "Urban Networks,"193).

¹⁷⁴⁹ Khalidi, "Lebanon," 501; Marius K. Deeb, "Lebanon: Prospects for National Reconciliation in the Mid-1980s," *Middle East Journal* 38(2) (Spring 1984), 273-275; Abu Khalil, "Druze, Sunni and Shiite," 37; Thomas Collelo, "Lebanon: A Country Study," in *Lebanon: Current issues and background*, ed. John C. Rolland (New York: Nova Science Publishers, 2004), 73; Johnson, *Class and Client*, 203 & 213.

¹⁷⁵⁰ Jakob Skovgaard-Petersen, "The Sunni religious scene in Beirut," *Mediterranean Politics* 3(1) (Summer 1998), 71; Owen, "The Lebanese Crisis," 939; Collelo, "Lebanon," 73; el-Solh, *Lebanon and Arabism*, 338.

¹⁷⁵¹ Intellectual/clerical episodes include the 13th century proto-Salafism of Ibn Taymiyyah (Antony Black, *The History of Islamic Political Thought: From the Prophet to the Present*, 2nd ed. (Edinburgh: Edinburgh University Press, 2011), 149-158), the first and third waves of the *Kadizadeli* movement (17th century) against extra-Islamic innovations (Madeline C. Zilfi, "The Kadizadeli: Discordant Revivalism in Seventeenth-Century Istanbul," *Journal of Near Eastern Studies* 45(4) (Oct., 1986): pp. 251-269), and the puritanical *Deobandi* movement (19th century) (Barbara D. Metcalf, *Islamic Revival in British India: Deoband, 1860-1900* (Princeton: Princeton University Press, 1982)). Examples of popular pre-modern movements include, most notably, the

movements to emerge periodically in response to political reverses and social ills; carried by the prognosis that Islam must be purged of innovations and/or entrenched dogma to rekindle its vitality¹⁷⁵². Today's Islamist movements should be understood as manifestations of this same impulse and, as such, with some caveats¹⁷⁵³, can be distinguished from Pan-Arab Nationalism and Marxism as a natural and organic ideology for Sunni Muslims¹⁷⁵⁴. The direct intellectual origins of Lebanon's contemporary Islamist ideologies/movements can be traced, however, to two distinctly modern revivalist trends originating in the late Ottoman period: *Wahhabi Salafism* and *Modernist Salafism*. To avoid confusion, I will refer to the former as *Salafism*¹⁷⁵⁵, and the latter as *Islamic modernism*.

Hanbalite vigilante movement (10th century) (Sadakat Kadri, *Heaven on Earth: A Journey through Shari'a Law* (London: Vintage Books, 2013), 72) and the second *Kadizadeli* movement (17th century) (Marinos Sariyannis, "The Kadizadeli movement as a social and political phenomenon: the rise of a 'mercantile ethic'?" in *Political Initiatives 'From the bottom up' in the Ottoman Empire*, eds. Antonis Anastasopoulos (Heraklion: Crete University Press, 2009)). Finally, several cases stand out as Khaldunian cases *par excellence*: those being the tribal puritanical movements of the Berber *Almoravids* (11th century) (Humphrey J. Fisher, "What's in a Name? The Almoravids of the Eleventh Century in the Western Sahara," *Journal of Religion in Africa* 22(4) (Nov., 1992): pp. 290-317) and *Almohads* (12th century) (Roger le Tourneau, *The Almohad Movement in North Africa in the 12th and 13th Centuries* (Princeton: Princeton University Press, 1969), and the Bedouin *Wahhabi* movement (18th century) (Simon Ross Valentine, *Force and Fanaticism: Wahhabism in Saudi Arabia and Beyond* (London: C. Hurst & Co. (Publishers) Ltd., 2015)).

¹⁷⁵² For example, in the 14th century, Ibn Khaldun proposed a theory of social evolution postulating that, over the course of roughly three generations, the allures of materialism so degrade the cohesion and morality of settled societies that they inevitably fall prey to the "corrective zealotry" of the nomadic peoples of the periphery, who restore justice and cohesion through the imposition of an austere socio-political system build upon Islamic principles, before they too succumb to the allures of materialism and are overthrown by the next generation of zealots (I. William Zartman, "A search for security and governance regimes," in *Democracy, War, and Peace in the Middle East*, eds. David Garnham and Mark Tessler (Bloomington and Indianapolis: Indiana University Press, 1995), 53.) Similarly, but more cynically, 17th century Ottoman historian Mustafa Naima asserted that each century witnessed "ambitious religious figures in search of a cause" taking it upon themselves to command right and forbid wrong (Emine Ö. Evered, "Rereading Ottoman Accounts of Wahhabism as Alternative Narratives: Ahmed Cevdet Pasa's Historical Survey of the Movement," *Comparative Studies of South Asia, Africa and the Middle East* 32(3) (2012), 626).

¹⁷⁵³ This reservation must be made on three counts: Firstly, historical waves of such revivalist agitation have typically been marginal and fleeting, except for those instances where popular and enduring participation was coordinated by tribal leadership, such as with the *Almoravid*, *Almohad* and *Wahhabi* movements. Secondly, while recurrent, such movements have always flown in the face of the religious establishment, which on each occasion has endured. Finally, the puritanism of such movements has been repugnant to popular religion in most of the regions where it emerged. In particular, Puritan iconoclasm against innovation was an affront to the popularly embraced Sufi orders than dominated popular Islam for most of the post-'*Abbasid* period (see, for example: Timothy May, "The Mongols as the Scourge of God in the Islamic World," in *Violence in Islamic Thought from the Qur'an to the Mongols: Vol. 2*, eds. I.T. Kristo-Nagy and R. Gleave, (Edinburgh University Press, 2016), 11; Tamim Ansar, *Destiny Disrupted: A History of the World through Islamic Eyes* (New York: Public Affairs, 2009), 165; and Kadri, *Heaven on Earth*, 108).

¹⁷⁵⁴ Though this is not the same thing as suggesting the beliefs and behaviours of groups like IS complement 'mainstream' Islamic beliefs.

¹⁷⁵⁵ This is because the Wahhabi Salafi movement most closely informed and resembles the Salafism that eventually popularised among Sunni-Lebanese militants. Moreover, using the term 'Salafi' facilitates easy reference to its later subdivisions, i.e.: *Purist-Salafism*, *Haraki-Salafism*, and *Salafi-jihadism*.

7.4.1.1. *Salafism:*

Salafism originated in the 1740s Arabian Peninsula as a revivalist movement opposing Ottoman religious orthodoxy. Conceived by Muhammad ibn ‘Abd al-Wahhab¹⁷⁵⁶, it attributed Muslim decline/subjugation to the empire’s embracing of extra- and non-Islamic innovations¹⁷⁵⁷ and urged Muslims to return to the pristine Islam of the *salaf* (‘pious forebears’) by abolishing innovations and rejuvenating *ijtihād* (scriptural hermeneutics/reasoning¹⁷⁵⁸) to apply God’s law to current circumstances more appropriately¹⁷⁵⁹. Despite resistance from the Ottoman religious establishment¹⁷⁶⁰, al-Wahhab’s ideas largely monopolised Islamic thought in the future-Saudi Arabia¹⁷⁶¹ and slowly gained a small intellectual and clerical base in Iraq¹⁷⁶².

7.4.1.2. *Islamic modernism:*

Islamic modernism was developed over the latter half of the 1800s by several intellectual circles with varying cooperation and interaction. Initial impetus was provided by the *Young Ottoman* movement, which emerged in the 1860s in evaluation of the Sultan’s Westernising *Tanzimat* reforms. Noting the failure of the reforms to stem Ottoman reverses against the West and secure the loyalty of the empire’s Christians, the Young Ottomans argued that modernism must be implemented in accordance with Islamic principles, which would solidify the

¹⁷⁵⁶ For a detailed scholarly biography of Muhammad ‘Abd al-Wahhab, see Natana J. DeLong-Bas, *Wahhabi Islam: From Revival and Reform to Global Jihad* (London: I.B. Tauris, 2004), Chapter 1.

¹⁷⁵⁷ Most notably speculative philosophy, *Sufism*, and ‘emulation’ (*taqlīd*) of the four schools of Islamic jurisprudence (*madhdāhib*) (Butrus Abu-Manneh, “Salafiyya and the Rise of the Khālidiyya in Baghdad in the Early Nineteenth Century,” *Die Welt des Islams*, 43(3) (2003), 350).

¹⁷⁵⁸ Exercising reason to apply God’s law to specific contemporary settings, as contrasted again *taqlīd* in which calcified rulings based on earlier circumstances are blindly adhered to.

¹⁷⁵⁹ *Ibid.*

¹⁷⁶⁰ David Commins, “From Wahhabi to Salafi,” in *Saudi Arabia in Transition: Insights on Social, Political, Economic and Religious Change*, eds. Bernard Haykel, Thomas Hegghammer, and Stéphane Lacroix (New York: Cambridge University Press, 2015), 153; Weismann, “A Perverted Balance,” 276.

¹⁷⁶¹ By striking an alliance with the future-ruling al-Saud tribe. See: R. Hrair Dekmejian, “The Rise of Political Islamism in Saudi Arabia,” *Middle East Journal* 48(4) (Autumn, 1994), 628-629.

¹⁷⁶² Abu-Manneh, “Salafiyya,” 364; Hala Fattah, “‘Wahhabi’ influences, Salafi responses: Shaikh Mahmud Shukri and the Iraqi Salafi Movement, 1745-1930,” *Journal of Islamic Studies* 14(2) (2003): pp. 127-148; Weismann, “A Perverted Balance,” 39, 44, 48; Itzhak Weismann, “Salafi Discourse in Nineteenth-Century Baghdad,” *British Journal of Middle Eastern Studies* 36(2) (Aug., 2009), 267; David Dean Commins, *Islamic Reform: Politics and Social Change in Late Ottoman Syria* (New York: Oxford University Press, 1990), 21 & 32.

cohesion of the empire's Muslim subjects¹⁷⁶³. The Young Ottomans were exiled for their criticisms¹⁷⁶⁴, but were replaced by more consequential Arab Islamic modernists, who shared the Salafi's criticism of religious innovations and taqlīd but contrasted with them in advocating the use of reason alongside ijihād; asserting Islam's compatibility with science, technology, and western institutions such as democracy and constitutionalism¹⁷⁶⁵. Proponents like Jamal al-Afghani, Muhammad 'Abduh, and Rashid Rida became famous and influential, but the movement was expansive; likeminded intellectual circles proliferating in Damascus¹⁷⁶⁶ and Baghdad¹⁷⁶⁷. Its most significant and lasting manifestation was the *Muslim Brotherhood* (est. 1928 Egypt), whose progenitor – Hassan al-Banna – was heavily influenced by Islamic modernism¹⁷⁶⁸.

7.4.2. Indigenisation:

Islamist ideas proliferated swiftly in some parts of the MENA, most notably in the new Saudi state (est. 1932)¹⁷⁶⁹, the popular *Muslim Brotherhood* in Egypt¹⁷⁷⁰, and the broad populist Islamist movement in Mandate Syria¹⁷⁷¹. In Lebanon, however,

¹⁷⁶³ Keddie, "Pan-Islam," 20; Güralp, "Using Islam," 23-25; Findley, "The Advent of Ideology," 149-154.

¹⁷⁶⁴ Findley, "Advent of Ideology," 154.

¹⁷⁶⁵ For good overviews of these debates, see: Lauzière, *The Making of Salafism*; Ira M. Lapidus, "Islamic Revival and Modernity: The Contemporary Movements and the Historical Paradigms," *Journal of the Economic and Social History of the Orient* 40(4) (1997): pp. 444-460; Aydin Bayram, "Modernity and the Fragmentation of the Muslim Community in Response: Mapping Modernist, Reformist and Traditionalist Responses," *Ankara Üniversitesi İlahiyat Fakültesi Dergisi* 55(1) (2014): pp. 71-100; Ebrahim Moosa and Sher Ali Tareen, "Revival and Reform," in *Islamic Political Thought: An Introduction*, eds. Gerhard Bowering (Princeton: Princeton University Press 2015); and Muhammad Khalid Masud, "Islamic Modernism," in *Islam and Modernity: Key Issues and Debates*, eds. Muhammad Khalid Masud, Armando Salvatore and Martin van Bruinessen (Edinburgh: Edinburgh University Press, 2009).

¹⁷⁶⁶ For good overviews of the Damascus school, see: Commins, *Islamic Reform*; Commins, "Religious Reformers"; Itzhak Weismann, "Between Şūfī Reformism and Modernist Rationalism: A Reappraisal of the Origins of the Salafiyya from the Damascene Angle," *Die Welt des Islams* 41(2) (Jul., 2001): pp. 206-237; and Raphaël Lefèvre, *Ashes of Hama: The Muslim Brotherhood in Syria* (New York: Oxford University Press, 2013).

¹⁷⁶⁷ For good overviews of the Baghdad school, see: Fattah, "'Wahhabi' influences"; Weismann, "A Perverted Balance"; and Itzhak Weismann, "Salafi Discourse".

¹⁷⁶⁸ Bayram, "Modernity," 88; Weismann, "A Perverted Balance," 37 & 50.

¹⁷⁶⁹ The pact between the Wahhabi movement and the House of al-Saud, in which they agreed to legitimise each other, is discussed in detail in Azeem Ibrahim, *Radical Origins: Why we are losing the battle against Islamic extremism – and how to turn the tide* (New York: Pegasus Books, 2017), 33-52.

¹⁷⁷⁰ By the 1940s, the Egyptian *Muslim Brotherhood* – founded by Hassan al-Banna upon the Islamic modernist ideas of Rashid Rida and Muhammad Abduh – boasted an estimated 500,000 active members and many more sympathisers and had become an active and potent force in Egyptian popular politics. See: William L. Cleveland and Martin Bunton, *A History of the Modern Middle East*, 6th ed. (Boulder, Co: Westview Press, 2016), 287.

¹⁷⁷¹ In the form of a broadly populist Islamic movement that lobbied against the secularising impositions of French colonialism, and would eventually form the nucleus for the Syrian branch

Islamist ideas did not find even marginal purchase until the 1940s, when two small, broadly intellectual movements were founded:

7.4.2.1. *The Youth of Muhammad [YM]*¹⁷⁷²:

This group was founded in 1946 Tripoli by autodidact sheikh Salam al-Shahhal, a disciple of Rashid Rida¹⁷⁷³ (an Islamic modernist who turned towards Salafism in the post-Ottoman period¹⁷⁷⁴). YM adopted a *Purist-Salafi* (i.e., apolitical) stance, its *raison d'être* to peacefully propagate Salafi ideals in Tripoli, in response to the proliferation of secular Pan-Arab Nationalist and Marxist ideologies¹⁷⁷⁵.

7.4.2.2. *The Association of the Worshippers of the Compassionate One*¹⁷⁷⁶:

Established following the 1948 *Arab-Israeli war* by Palestinian refugee Muhammad Umar al-Da'uq, this organisation established branches across Lebanon, though its membership remained small and intellectual¹⁷⁷⁷. Less ideologically-developed than YM, al-Da'uq nevertheless attributed Muslim decline/subjugation (specifically the combined Arab defeat against Israel) to a societal drift away from Islam and sought remedial action through bringing Muslims back to "Islam as a faith, dogma, way of life, and moral values inspiring the spirit of jihad and sacrifice"¹⁷⁷⁸.

of the Muslim Brotherhood. See: Mneimneh, "The Islamization," 55; Itzchak Weismann, "The Politics of Popular Religion: Sufis, Salafis, and Muslim Brothers in 20th-century Hamah," *International Journal of Middle East Studies* 37(1) (Feb., 2005), 47; Munson Jr., *Islam and Revolution*, 85; Lefèvre, *Ashes of Hama*, 23-26.

¹⁷⁷² Aka, *Shabāb Muhammad*.

¹⁷⁷³ Rabil, *Salafism in Lebanon*, 64.

¹⁷⁷⁴ Rida grew increasingly alienated from the Islamic modernism (and its application to Pan-Arab Nationalism) that he had helped to foster in the post-First World War period. In his eyes, the Pan-Arab Nationalism of Emir Faysal constituted a mere selling-out to the colonial powers in the name of gaining personal power (Lauzière, *The Making of Salafism*, 64); while his enthusiasm for the institutions of Western modernity – which he sought to Islamise – was soured by the apparent vacuousness of this institutions as revealed by the European powers' "wilful destruction of an Islamic democracy" (Thompson, "Rashid Rida and the 1920 Syrian-Arab Constitution," 253). In response, he increasingly devoted his rhetorical support to the Wahhabi movement and its military patron, 'Abd al-Aziz al-Saud, in whom he placed his hopes of rejuvenating the 'Umma (Lauzière, *The Making of Salafism*, 64). See also: Commins, "From Wahhabi to Salafi," 156; Weismann, "A Perverted Balance," 37 & 44.

¹⁷⁷⁵ Gade, "Return to Tripoli," 37.

¹⁷⁷⁶ Aka, *Jamā'at 'Ubād al-Rahman*.

¹⁷⁷⁷ By the early 1950s, it held a presence in most Lebanese cities – see: Rabil, *Salafism in Lebanon*, 65.

¹⁷⁷⁸ American Foreign Policy Council, *World Almanac of Islamism 2011* (Plymouth: Rowman & Littlefield Publishers, Inc., 2011), 121.

7.4.3. 'Salonisation':

The 1940s/50s saw internal debate within these fledgling movements. Most consequently, two individuals - Fathi Yakan and Sa'id Sha'ban – early YM members, departed the passive, apolitical organisation in favour of al-Da'uq's more politically-minded movement, only to grow impatient with his own non-confrontational stance (al-Da'uq restricted the movement to educational outreach – despite its militant long-term objectives – after watching Nasser's repression of the Egyptian *Muslim Brotherhood*)¹⁷⁷⁹. Yakan became influenced by Syrian Muslim Brotherhood fugitive Mustafa al-Sibai, who preached a more militant line influenced by Sayyid Qutb¹⁷⁸⁰, and, subsequently, established a Lebanese branch of the Brotherhood in 1957, called the *Islamic Association [AI]*¹⁷⁸¹. He did not adopt Sibai's Qutbian line uncritically, however. Instead, he formulated a pragmatic ideology based upon challenging secularism and (re)Islamising society not by force of arms as Qutb directed, but through gradual proselytization¹⁷⁸².

This period saw al-Shahhal refine his purist-salafi doctrine after visiting Medina, where he forged ties with leading purist scholars, notably Nasser al-Din al-Albani and Grand Mufti Abdul Aziz Abdullah Ibn Baz, the latter of whom would later channel Saudi patronage to al-Shahhal and his sons¹⁷⁸³.

7.4.4. 'Vanguardisation':

Lebanon's Sunni Islamist tendency has experienced three vanguard periods:

7.4.4.1. *First vanguard: prelude to the Two-Year War, c. 1957-1976:*

This period saw attempts by the YM and IA to cultivate popular support. For YM this was an unstructured process based on proselytization and warning against secularism (particularly Pan-Arab Nationalism and Marxism) and innovations such as Sufism¹⁷⁸⁴. The IA's efforts were more concerted, founding schools, medical clinics, and a hospital with which to begin integrating themselves

¹⁷⁷⁹ Rabil, "Fathi Yakan," 58; Gade, *Return to Tripoli*, 36.

¹⁷⁸⁰ Rabil, "Fathi Yakan," 59; American Foreign Policy Council, *World Almanac of Islamism*, 122; Gade, "Return to Tripoli," 36.

¹⁷⁸¹ Abdul Ghany Imad, "A topography of Sunni Islamic organizations and movements in Lebanon," *Contemporary Arab Affairs* 2(1) (Jan.-Mar., 2009), 144.

¹⁷⁸² Rabil, "Fathi Yakan," 57; Rabil, *Salafism in Lebanon*, 72; Robert G. Rabil, "Lebanon," in *Guide to Islamist Movements: Volume 1*, ed. Barry Rubin (New York: M.E. Sharpe, Inc., 2010), 320; Gambill, "Islamist Groups," 43; Pall, *Salafism in Lebanon*, 9.

¹⁷⁸³ Pall, *Salafism in Lebanon*, 63; Rabil, *Salafism in Lebanon*, 5.

¹⁷⁸⁴ Rabil, *Salafism in Lebanon*, 64; Pall, *Salafism in Lebanon*, 64-5; Gade, "Return to Tripoli," 37.

positively into the social fabric and usurping Sunni zu‘amā’ patronal soft power¹⁷⁸⁵, while attempting to garner religious respectability by seeking recognition from the orthodox Sunni-Lebanese religious establishment, *Dar al-Fatwa*¹⁷⁸⁶. It also attempted to burnish its anti-imperialist credentials by helping recruit and train fighters for the anti-establishment forces during the 1958 *Lebanese Crisis* (though not forming its own militant organisation)¹⁷⁸⁷, and, in 1972, attempted to amplify its voice and profile by running a candidate in parliamentary elections¹⁷⁸⁸.

For both IA and YM, this vanguard period culminated with the *Two-Year War*, which provided an exploitable HSC-VSC breakdown in which to attempt to win over the emergent mass of rational hedgers. However, as we have seen, they were unable to compete with the dominant Marxist tendency and promptly withdrew themselves from an active role in the conflict.

7.4.4.2. *Second vanguard: Post-LNM-PRM civil war, c. 1982-1986:*

The second vanguard period commenced following the LNM-PRM’s disintegration following Syria’s intervention in the *Two-Year War* and subsequent *Lebanese Civil War* proper. The collapse of the LNM-PRM’s ‘surrogate’ VSC with the Sunni-Lebanese menu people – coupled with continued alienating behaviour by the Sunni zu‘amā’ (who, particularly in Tripoli, ingratiated themselves with the hated Syrian occupiers)¹⁷⁸⁹ – left Sunni-Lebanese ‘rational hedgers’ amenable to new contenders.

Neither the YM nor the IA played active anti-establishment roles during this phase, the YM withdrawing into quietism¹⁷⁹⁰ and the IA subjecting itself to Syria¹⁷⁹¹ and focusing on resisting Israel’s occupation of south Lebanon (becoming a vehicle for Lebanese-Sunnis wishing to do so)¹⁷⁹². Instead, the anti-establishment mantle was seized by a new Islamist generation, whose vanguard

¹⁷⁸⁵ Rabil, “Fathi Yakan,” 61; Rabil, *Salafism in Lebanon*, 84; Rabil, “Lebanon,” 320.

¹⁷⁸⁶ Ibid.

¹⁷⁸⁷ Rabil, “Fathi Yakan,” 60; Rabil, *Salafism in Lebanon*, 67.

¹⁷⁸⁸ Ibid.

¹⁷⁸⁹ Gade, “Sunni Islamists,” 35.

¹⁷⁹⁰ Rabil, *Salafism in Lebanon*, 64-65.

¹⁷⁹¹ This was another symptom of Yakan’s distinctly pragmatic streak. See: Daher, “In the Wake of the Islamic State,” 211; Gade, “Return to Tripoli,” 34 & 47; Gade, “Limiting violent spillover,” 5.

¹⁷⁹² Israel had invaded Southern Lebanon in 1978 and again, more significantly, in 1982. American Foreign Policy Council, *World Almanac of Islamism*, 122; Rabil, *Salafism in Lebanon*, 78.

period immediately progressed into ideological competition over the sentiments of the rational hedgers¹⁷⁹³.

As noted, this new Islamist generation was ideologically vague, and mostly consisted of politically insignificant, ephemeral local self-defence forces for Sunni neighbourhoods threatened by confessional enemies¹⁷⁹⁴. One exception was *Harakat al-Tawhid al-Islami* [Tawhid], a merger of several extant, mostly Marxist, armed groups¹⁷⁹⁵ - attracting an estimated 3,000 active members¹⁷⁹⁶ - under Sha'ban's charismatic leadership. Sha'ban had headed Tripoli's IA branch, but he disagreed with the IA's conciliatory approach towards Syria and its gradualist approach more broadly¹⁷⁹⁷. Tawhid portrayed itself as the only force willing and able to protect Tripoli's Sunni menu people from Syrian and other predations, and militarily forged an Islamic Emirate over most of Tripoli¹⁷⁹⁸. This was short-lived, suffering significant internal defections over its uncompromising ideological impositions¹⁷⁹⁹ and, after three years, was crushed by a coalition of its local enemies supported by the *Syrian Arab Army* [SAA]¹⁸⁰⁰. Sha'ban was disgraced, earning accusations of treachery and cowardice when he agreed to be co-opted by the Syrian regime in return for retaining his freedom¹⁸⁰¹. Tawhid's ideological vision would not survive in any concrete form following the end of its brief reign, with the Tripolitanian menu people coalescing around an ideologically-vague, enclavist Sunni solidarity against its enemies, particularly the Syrian regime and its local Allawite proteges¹⁸⁰². Upon the civil war's end, the population embraced the Ta'if Accords which, as noted, restored the *status quo* with some pro-Sunni redistributions of power.

7.4.4.3. *Third vanguard: post-civil war, c. 1990-2014:*

The Islamist tendency's third, eventually successful, vanguard period commenced with the end of the Lebanese civil war, although it only assumed an

¹⁷⁹³ See Appendix B.

¹⁷⁹⁴ See Section 7.3. above.

¹⁷⁹⁵ Namely, the Marxist-leaning *Popular Resistance and Movement for an Arab Lebanon*, alongside the Islamist *Jundallah*. See: Rougier, *The Sunni Tragedy*, 11; Gade, "Sunni Islamists," 41-42.

¹⁷⁹⁶ Gade, "The reconfiguration of clientelism," 155.

¹⁷⁹⁷ Rabil, *Salafism in Lebanon*, 74; Gade, "Return to Tripoli," 41.

¹⁷⁹⁸ Tawhid's Emirate is viscerally explored in the work of Tine Gade, particularly Gade, "Return to Tripoli" and Gade, "Sunni Islamists".

¹⁷⁹⁹ Rabil, *Salafism in Lebanon*, 77; Rougier, *The Sunni Tragedy*, 11.

¹⁸⁰⁰ Gade, "Sunni Islamists," 42; Gade, "Return to Tripoli," 47.

¹⁸⁰¹ Ibid.

¹⁸⁰² Ibid.

overtly anti-establishment role following Hezbollah's 2008 'coup' – an event which, we have seen, was a crucial development towards the HSC-VSC breakdown precipitating the 2012-2014 *Sunni Insurrections*.

The late-civil war era saw a broadening and institutionalising of Lebanon's Sunni Islamist tendency. Notable additions/augmentations included:

- 1) A burgeoning IA.
- 2) A new Salafi generation – haraki (political/activist) and purist (apolitical) - led predominantly by Salam al-Shahhal's sons, Da'i al-Islam al-Shahhal and Hassan al-Shahhal, respectively¹⁸⁰³.
- 3) An encroaching but outwards-looking Salafi-jihadist trend, chiefly confined to Palestinian refugee camps and directed towards external enemies¹⁸⁰⁴.
- 4) The growth of *al-Ahbash*, a Sufi-leaning Islamist organisation closely linked to the Syrian occupying forces¹⁸⁰⁵.
- 5) A reconstituted Tawhid also closely linked to Syria¹⁸⁰⁶.

These groups all sought to exploit the dislocations wrought by the civil war and post-war Syrian occupation to increase their followings. This they endeavoured to achieve through two main strategies:

Firstly, they exploited *Dar al-Fatwa's* wartime loss of control over Lebanese mosques to seize control themselves, often violently fighting amongst themselves in what became known as the 'war of the mosques'¹⁸⁰⁷. Control over

¹⁸⁰³ Pall, *Lebanese Salafis*, 51; Mneimneh, "The Islamization," 60; Rabil, *Salafism in Lebanon*, 5 & 82; Rougier, *The Sunni Tragedy*, 14; Saouli, "Lebanon's Salafis," 48; Gade, "Return to Tripoli," 60.

¹⁸⁰⁴ Two types of Salafi-jihadist faction emerged during this time: 1) Palestinian refugee-camp-based groups hoping to rejuvenate the PRM through a transition away from Marxist and Palestinian nationalism and towards salafi-jihadism; and 2) multinational groups using Lebanon as a staging ground to assemble and train units to contribute to jihads overseas; notably Chechnya and Iraq. See: Rougier, *Everyday Jihad*, 237; Rougier, *The Sunni Tragedy*, 83; Bilal Y. Saab, "al-Qa'ida's presence and influence in Lebanon," *CTC Sentinel* 1(12) (2008), 6; Magnus Ranstorp and Bilal Y. Saab, "Fatah al-Islam: How an ambitious jihadist project went awry," *Brookings Institute*, dated November 28 2007. Accessed November 15 2015. Available at: <https://www.brookings.edu/articles/fatah-al-islam-how-an-ambitious-jihadist-project-went-awry/>; Rabil, *Salafism in Lebanon*, 83 & 133; Gade, "Return to Tripoli," 78.

¹⁸⁰⁵ Mustafa Kabha and Haggai Erlich, "Al-Ahbash and Wahhabiyya: Interpretations of Islam," *International Journal of Middle East Studies* 38 (2006): pp. 519-538; Rabil, *Religion, National Identity, and Confessional Politics*, 93; Gambill, "Islamist Groups," 44; Pall, *Salafism in Lebanon*, 9.

¹⁸⁰⁶ Pall, *Salafism in Lebanon*, 11; Imad, "A topography," 149.

¹⁸⁰⁷ Pall, *Lebanese Salafis*, 46; Pall, *Salafism in Lebanon*, 9 & 78; Tine Gade, "Islam keeping violent jihadism at bay in times of Daesh: State religious institutions in Lebanon, Morocco and Saudi Arabia since 2013," *European University Institute* (2019): Available at:

mosques became a key mechanism for integrating themselves into Sunni-Lebanese daily life, raising their visibility and religious credentials, and disseminating their ideological visions.

Secondly, they exploited the straining of the zu‘amā’s patronage networks wrought by the war’s dislocations and post-war Syrian obstructionism to establish usurping patronage networks, both weening the menu people and Qabadayat off their dependence on the zu‘amā’s VSC and normalising and enhancing the image of Islamist groups in Sunni society¹⁸⁰⁸.

As noted, these factions did not initially pursue anti-establishment agendas, rather seeking to integrate themselves into the *status quo* and Islamise society from below rather than through overt imposition as Tawhid had attempted in the 1980s. This changed with the HSC-VSC breakdown – beginning in 2005 and escalating with Hezbollah’s 2008 coup and the onset of the Syrian conflict *cause de jour* in 2011 – whereupon the Sunni-Lebanese menu people grew amenable once more to alternative leaders/arrangements that would protect them against HSC transgressions by Hezbollah and/or the Syrian regime. However, only the Haraki-Salafis and Salafi-jihadists stood as viable candidates for this role. The apolitical quietist-salafis disqualified themselves through their rejection of political involvement¹⁸⁰⁹ and calls for détente with Hezbollah¹⁸¹⁰. Al-Ahbash disqualified itself – and lost significant support – on account of its uncompromising pro-Syrian stance¹⁸¹¹, a fate shared by Tawhid¹⁸¹². Meanwhile, the IA splintered into pro- and anti-Syrian factions, substantially weakening both branches¹⁸¹³.

https://cadmus.eui.eu/bitstream/handle/1814/61424/MED_2019_04.pdf?sequence=1&isAllowed=y, 22.

¹⁸⁰⁸ There are today an estimated 6,000 registered religious charities in Lebanon (Pall, *Salafism in Lebanon*, 67). Different Salafi networks, al-Ahbash, and the IA all compete in running free or subsidised schools, clinics and even hospitals, as well as providing employment support and essential services. See: Kabha and Erlich, “Al-Ahbash and Wahhabiyya,” 523; Imad, “A topography of Sunni Islamic organization,” 147; Lefèvre, *The roots*, 9; Rabil, “Lebanon,” 320; Rougier, *The Sunni Tragedy*, 16; Pall, *Lebanese Salafis*, 51.

¹⁸⁰⁹ A key aspect of Purist-Salafi doctrine is submission to authority as a means of preventing civil strife – stability is held sacrosanct in order to enable exclusive focus on personal piety and religious education. See: Wiktorowicz, “Anatomy of the Salafi Movement,” 220; Pall, *Salafism in Lebanon*, 20.

¹⁸¹⁰ The Purist Salafis – headed by Hassan al-Shahhal – attempted to ward off sectarian conflict in Lebanon by signing a ‘memorandum of understanding’ with Hezbollah pledging towards cooperation between the country’s Sunni and Shi‘a communities. The move was met with outrage by Haraki Salafis and many Lebanese Sunnis. See: Rabil, *Salafism in Lebanon*, 6.

¹⁸¹¹ Pall, *Lebanese Salafis*, 66.

¹⁸¹² Pall, *Salafism in Lebanon*, 11.

¹⁸¹³ In 2006, Yakan and a number of leading IA cadres splintered from the group over disagreements regarding the Syrian question. Holding the West to be the ‘Umma’s greatest

Thus, the Haraki-Salafis and Salafi-jihadists (the latter by this time increasingly augmented by external factions such as encroaching IS and JaN cells¹⁸¹⁴) – who, as noted by Rabil¹⁸¹⁵ and Pall¹⁸¹⁶, became increasingly intertwined during this period – existed as the only viable anti-establishment Islamist movements by the time of the 2012-2014 *Sunni insurrections*. They availed themselves to the new rational hedgers, making a point of stepping up in all areas where mainstream Sunni leadership would or could not: railing against Hezbollah/LAF transgressions against the Sunni community¹⁸¹⁷, rallying support for Syrian revolutionaries¹⁸¹⁸ and refugees¹⁸¹⁹, and forming armed militias to protect Sunni neighbourhoods from their perceived enemies; in particular Hezbollah, the Alawite militias of Tripoli, the militias of pro-Hezbollah/Syrian Sunni zu‘amā’, and the LAF¹⁸²⁰; all the while denouncing the mainstream Sunni leadership for their weaknesses, failures, and alleged betrayals¹⁸²¹. It was these mobilisations – and attendant sabre rattling – that would prompt/facilitate the *Sunni Insurrections* of 2012-2014.

7.4.5. HSC-VSC breakdown and the opening of the ‘ideological field’:

enemy, Yakan and his associates consider Syria to be an essential ally, in direct contradistinction to those who remained with the IA. They established the *Islamic Action Front* towards this end. See: Imad, “A topography of Sunni Islamic organizations,” 148; Pall, *Salafism in Lebanon*, 88; Rabil, *Salafism in Lebanon*, 178.

¹⁸¹⁴ Lister, *The Syrian Jihad*, 182; Benedetta Berti, “Lebanon and the rise of the Islamic State,” in *The Islamic State: How viable is it?* eds. Yoram Schweitzer and Omer Einav (Tel Aviv: Institute for National Security Studies, 2016), 142; Siegrist, “Lebanon,” 15; Lefèvre, *The roots of crisis in northern Lebanon*, 3.

¹⁸¹⁵ Rabil notes that “their [haraki-salafis] takfiri and jihadist statements and rhetoric have made them more or less indistinguishable from the salafi jihadists”. See: Rabil, *Salafism in Lebanon*, 228.

¹⁸¹⁶ Pall, *Salafism in Lebanon*, 222.

¹⁸¹⁷ Specific examples by specific individuals are quoted or referenced extensively in: Luca, “Sectarian Conflict,” 56, 104, 106; Pall, *Lebanese Salafis*, 42; Rabil, *Salafism in Lebanon*, 11, 122; Nir, “The Sunni-Shi’a balance,” 65; Zelin, “Jihadism in Lebanon,” 52; Gade, “Lebanon,” 9; “Lebanon’s Armed Forces under Fire”, *The Economist*, dated April 15 2014. Accessed January 4 2015. Available at: <https://www.economist.com/pomegranate/2014/04/15/under-fire>

¹⁸¹⁸ Rabil, *Salafism in Lebanon*, 11, 219; 225-226; Rougier, *The Sunni Tragedy*, 181-182; Zoltan Pall, “Kuwaiti Salafism and Its Growing Influence in the Levant,” *Carnegie Endowment for International Peace* (May 2014). Available at: https://carnegieendowment.org/files/kuwaiti_salafists.pdf

¹⁸¹⁹ Pall, *Salafism in Lebanon*, 2; Almawla, “Salafis in Lebanon,” 5.

¹⁸²⁰ See Chapter 6.

¹⁸²¹ Luca, “Sectarian Conflict,” 56, 108; Rabil, *Salafism in Lebanon*, 12, 183, 207, 225, 230; Rougier, *The Sunni Tragedy*, 212, 219; Saouli, “Lebanon’s Salafis,” 54, 56; Lefèvre, *The roots*, 8; Gade, “Lebanon,” 9; Garrett Nada, “Lebanon’s Sheikhs Take on Assad and Hezbollah,” *Woodrow Wilson Center*, dated May 11 2013. Accessed February 12 2015. Available at: <https://www.wilsoncenter.org/article/lebanons-sheikhs-take-assad-and-hezbollah>

As previously, I defer my breakdown of the variables/mechanisms shaping these competitions for Appendix B. As I have established, in both contests (Tawhid in the 1980s, the Haraki Salafis and Salafi-jihadists in 2012-2014), the Islamist tendency popularised in an ideological vacuum, absent significant rivals. Nevertheless, it is important to account for how and why such tendencies emerged so dramatically (from such humble, marginal origins) to fill those vacuums. Upon my investigations – detailed in Appendix B – I find that, in both competitions, the Islamists brought to the table the same interacting sets of qualities as had helped their predecessors popularise in earlier competitions.

7.4.6. Momentum:

Like Pan-Arab Nationalism and Marxism before it, Lebanon's Haraki-Salafi/Salafi-jihadist current monopolised anti-establishment sentiments among Sunni-Lebanese militants during the *Sunni Insurrections*. As with the Marxist tendency, ideological pedantism was irrelevant to most – with many only demonstrating token adherence to Salafi life-style mores, and only the most simplistic understanding of ideological doctrine¹⁸²². Unlike in 1975-6, the mainstream Sunni leadership was not generally conceived of as an active enemy, only as failed leaders to be superseded or merely buttressed. Rare were overt calls for an Islamist political entity (or incorporation into IS' Caliphate) in place of the Lebanese state and its HSC-VSC nexus. Despite its general Islamist ethos, most Salafi leaders did not articulate an alternative vision of Lebanon at all (though nor did they preclude one – leaving the door open). Rather, they typically operated by way of ultimatum rather than manifesto – demanding the Sunni zu'amā' rise to their duty of defending the Sunni community (or groups like IS would)¹⁸²³ rather than demanding an overhaul of the entire system as Pan-Arab

¹⁸²² Pall, *Lebanese Salafis*, 35-36, 65; Pall, *Salafism in Lebanon*, 8; Lefèvre, *The sociopolitical undercurrent*, 1, 4-5.

¹⁸²³ This is found both among movement cadres and hedging supporters. Quoted examples can be found in: Luca, "Sectarian Conflict," 108; Rosen, *Aftermath*, 430, 433-434; Rabil, *Salafism in Lebanon*, 222, 225; Mohamed Hemish, "Can Islamic State win a foothold in Lebanon's Tripoli?" *Middle East Eye*, dated February 12 2015. Accessed March 4 2015. Available at: <https://www.middleeasteye.net/news/can-islamic-state-win-foothold-lebanons-tripoli>; Nada, "Lebanon's Sheikhs,"; Antoine Amrieh and Misbah al-Alil, "Army Offensive signals open-ended war", *The Daily Star Lebanon*, dated October 27 2014. Accessed December 12 2014. Available at: <https://www.dailystar.com.lb/News/Lebanon-News/2014/Oct-27/275454-army-offensive-signals-open-ended-war.ashx>; Donaghy, "ISIL exploit poverty"; Fernande Van Tets, "Islamic State: Battle of Tripoli is won but hearts and minds are lost," *The Independent*, dated October 28 2014. Accessed August 4 2016. Available at: <https://www.independent.co.uk/news/world/middle-east/islamic-state-battle-tripoli-won-hearts-and-minds-are-lost-9824297.html>

Nationalism and the Marxist tendency had. The Salafis were thus seen more as purified leaders to help rejuvenate Sunni vitality and beat HSC transgressors back into line, rather than as an alternative to the *status quo*; to realise the stolen promise of the *Ta'if Accords*, rather than to do away with it. What was sought above all things was a Sunni equivalent to Hezbollah to prevent the latter's HSC transgressions – and Islamist armed groups of the kind winning laurels in Syria appeared apt examples¹⁸²⁴. Nevertheless, the Salafis became objects of admiration and emulation – their moral upstandingness, courage, and integrity constantly contrasted against the apparent corruptions, cowardice, and treachery of the mainstream Sunni leadership¹⁸²⁵; their ideological narratives becoming the default frameworks through which militants understood and expressed their circumstances and perceived friend and foe¹⁸²⁶.

7.4.7. Attachment:

Attachment appears to have been fostered in several ways:

Firstly, Islamist figureheads routinely acted in ways positively contrasted against the failures of the Sunni *zu'amā'*: the former denouncing and rallying action against the Sunni menu people's perceived enemies while the *zu'amā'* attempted to placate and even accommodate them¹⁸²⁷; supporting efforts to aid the Syrian revolutionaries while the *zu'amā'* pledged non-involvement while doing nothing to prevent Hezbollah support for the Syrian regime¹⁸²⁸; and supporting Syrian refugees while the *zu'amā'* failed to take concerted action¹⁸²⁹.

Secondly, while the Sunni *zu'amā'* were showing weakness and often self-interest, Islamist figureheads were displaying strength and heroism, whether local Qabadayat facing death or imprisonment to stand up to the perceived enemies of the menu people¹⁸³⁰, or the Islamist SAOM factions and IS taking on those perceived enemies on a grander stage.

¹⁸²⁴ Luca, "Sectarian Conflict," 91; Daher, "In the Wake of the Islamic State," 210; Haddad, "Accounting for Lebanese Muslims' perspectives," 252-253; Nir, "The Sunni-Shi'a balance," 65; Zelin, "Jihadism in Lebanon," 53.

¹⁸²⁵ Pall, *Lebanese Salafis*, 36; Amrieh and al-Alil, "Army Offensive,"; Van Tets, "Islamic State".

¹⁸²⁶ By depicting Sunni-Shi'a tensions as part of a cosmic drama, global conspiracy, or Iranian proxy conquest. See: Luca, "Sectarian Conflict," 104; Pall, *Lebanese Salafis*, 54-55.

¹⁸²⁷ See Chapter 6.

¹⁸²⁸ Ibid.

¹⁸²⁹ Luca, "Sectarian Conflict," 65-67; Rougier, *The Sunni Tragedy*, 175; Alkawla, "Salafis in Lebanon," 5.

¹⁸³⁰ Admiration of the 'Islamised' Qabadays is discussed in detail in Lefèvre, *The sociopolitical undercurrent*.

Thirdly, as with previous movements, fighters grew accustomed to experiencing comradeship with fellow identifying Islamists, and to experiencing conflict or obstruction from those who opposed them – from the actively predatory Hezbollah to the seemingly self-interested, exploitative, and at times actively treacherous Sunni *zu‘amā*¹⁸³¹.

Finally, like the Marxist tendency, the Islamist tendency cultivated an enchanting aesthetic and shared universe of meaning – both of which provided positive identity information to a community languishing in destitution and impotence. In particular, Salafi religious discourses created a dichotomised moral universe in which adherents could reimagine themselves as un-ambiguous heroic stalwarts in a cosmic battle against clear, villainous enemies of both themselves and God¹⁸³².

7.4.8. Disaffection and decline:

It remains too early to tell what will become of Lebanon’s Sunni-Islamist militant tendency. Available evidence promotes tentative optimism that it is following in the footsteps of its Pan-Arab Nationalist and Marxist predecessors: firstly, there have been no significant incidents of Islamist IV since late October 2014 (the end-date of Chapter 6’s *Sunni Insurrections* episode), while anti-establishment contention appears to have shifted, since 2019, decisively towards a non-violent, popular, secular, and anti-sectarian protest movement¹⁸³³

¹⁸³¹ Alleged exploitations/self-interests included charges that the *zu‘amā* were keeping their constituents deliberately destitute to keep them subservient (Samaha, “Lebanon’s Sunnis search for a saviour”; Rougier, *The Sunni Tragedy*, 23). Alleged treacheries include: 1) Al-Mustaqbal involvement in military crackdowns on Sunni Islamist militants; 2) using Salafi militants for their own purposes and then betraying them once their purpose was served (particularly Sidon’s Sheikh al-Assir); 3) giving up on plans to create a Sunni equivalent to Hezbollah; 4) forming a national unity cabinet with Hezbollah in early 2014, which led to crackdowns on Islamist militants previously given cover by al-Mustaqbal, etc. See: Van Veen, “Elites, power and security,” 30; Gade, “Limiting violent spillover,” 4; Saouli, “Lebanon’s Salafis,” 56; Lefèvre, *The roots*, 8.

¹⁸³² As discussed in: Rabil, *Salafism in Lebanon*, 239; Almawla, “Salafis in Lebanon,” 9; Muhammad Abi Samra, “Revenge of the Wretched: Islam and Violence in the Bab al-Tabaneh neighbourhood of Tripoli,” in *Arab Youth: Social Mobilisation in Times of Risk*, eds. Samir Khalaf and Roseanne Saad Kalaf (London: Saqi Books, 2011), 232-233; Pall, *Lebanese Salafis*, 48.

¹⁸³³ The movement, which bears a marked resemblance to the domestic protest movement of the 1960s-70s, is less concerned with the sectarian anxieties of the militant Islamist movement’s supporters, proposing a diagnostic and prognostic framing that shifts blame for Lebanon’s woes away from the sectarian machinations of Hezbollah and upon the cross-confessional political elite. It emerged in October 2019 in protest over Lebanon’s dire socioeconomic situation – triggered by a planned tax on *Whatsapp*: “the one thing that works in Lebanon”. Determined to avoid a dissent into civil war as followed similar uprisings across the Arab world in 2011, the movement is committed to peaceful protest and anti-sectarian. Its demands focus on abolishing confessional consociationalism, ending corruption and improving essential services. See: Gida Malafronte, “What is Lebanon’s ‘Thawra’ (revolution) about?” *Political Studies Association*, dated January 6

(although it is not known how many Islamist supporters have shifted towards this movement with its radically different diagnostic, prognostic, solidarity, and strategic frames). Anecdotal evidence suggests, moreover, that many Sunni-Lebanese former IS supporters have turned against the group, considering its leaders to be self-serving charlatans cynically using/abusing a perverted Islamic discourse to rally supporters¹⁸³⁴, while many fighters volunteering for the SAOM returned from Syria disillusioned over the infighting they witnessed¹⁸³⁵ and the futility of the fighting itself, burnishing resentment over the recklessness of the Sheikhs who, through jingoistic religious fatwas, sent them there¹⁸³⁶.

It may be more interesting to watch how time will test my own model. Observing the current situation, we should expect that the Islamist tendency will indeed suffer disaffection and decline:

Firstly, the Islamist tendency, rejuvenated and redeemed in the wake of the 2011 Arab uprisings, has failed to deliver upon its stated objectives in all locations: notably, IS failed to topple or defend against the perceived oppressors of the region's Sunnis, improve their quality of life, and endure long enough to sustain such improvements. Equally futile have been similar efforts by Islamist SAOM factions, while in Lebanon the imitators of such groups have been subjugated. That said, the recent (arguable) victory of the Taliban in finally grinding down international COIN efforts in Afghanistan¹⁸³⁷ may help restore faith in the militant Islamist project.

Secondly, prominent Islamist factions have alienated themselves through their often brutish, divisive, and warlordish behaviour in Iraq and Syria¹⁸³⁸,

2020. Accessed January 17 2021. Available at: <https://www.psa.ac.uk/psa/news/what-lebanon%E2%80%99s-%E2%80%98thawra%E2%80%99-revolution-about>; Walid el-Houri, "Lebanon: a revolution redefining a country," *OpenDemocracy*, dated November 8 2019. Accessed January 17 2021. Available at: <https://www.opendemocracy.net/en/north-africa-west-asia/lebanon-revolution-redefining-country/>

¹⁸³⁴ Lefèvre, *The sociopolitical undercurrent*, 17.

¹⁸³⁵ *Ibid*, 10

¹⁸³⁶ *Ibid*.

¹⁸³⁷ See Chapter 3.

¹⁸³⁸ Most recently, *Hayat Tahrir al-Sham* (formerly *Jabhat al-Nusra*) has faced growing popular criticism and demonstrations in its Idlib province stronghold on account of a litany of transgressions out-of-keeping with their ideological persona as a movement for justice and liberation. One report by the *Carnegie Endowment for International Peace* listed among its alleged crimes: "repeated instances of theft, looting, kidnapping, and killing of civilians [...] engagement in battles – widely seen as counterproductive – with [other anti-regime forces] [...] clamp[ing] down on independent merchants in favour of those whose allegiance it had secured [...] high taxes on farmers, traders, and other professionals [...] [prices rises on] basic services [...] confiscation of the property of Christians [...] monopolistic practices, financial corruption, and

creating a visible “say-do-gap” that exposes them to accusations of hypocrisy, insincerity, and self-service, as Sunni-Lebanese anecdotal evidence from Syria already seems to suggest.

Thirdly, in Syria, SAOM Islamists have lost momentum in their fight against the al-Assad regime, while falling into brutal infighting amongst themselves¹⁸³⁹, again opening themselves up to accusations of putting personal interests or egos ahead of the cause, while damaging intra-Sunni solidarity and rendering the movement increasingly incapable of delivering upon its promises.

Finally, across Iraq, Syria, and indeed Lebanon, the militant Islamist movement has been militarily subjugated, undermining the perceived veracity of its strategic frames/ability to affect change. IS’ caliphate has collapsed, the SAOM’s Islamists have been bottled up in their Idlib province enclave, increasingly turning on each other and seemingly surviving Assad’s offensives only at the behest of Turkish bargaining and co-option, while Lebanon’s own Sunni Islamist militants have been checked by the LAF’s security plan and mass arrests. That said, as I have noted¹⁸⁴⁰, IS is already showing signs of resurgence, proving to potential sympathisers once more the veracity and resilience of its Maoist-style protracted war strategy. For those seeking urgent change, this is unlikely to win many supporters, but for those ‘attached’ to the group and its ideology, it may be enough to retain that attachment.

clampdown on freedoms [and] [opening] trading links [with the regime]” (Manhal Bareesh, “How and Why Idlib Defied its Jihadi Overlords,” *Carnegie Endowment for International Peace*, dated May 15 2020. Accessed February 6 2021. Available at: <https://carnegie-mec.org/2020/05/15/how-and-why-idlib-defied-its-jihadi-overlords-pub-81811>).

¹⁸³⁹ Notably the much sensationalised “jihadi civil war” that raged between IS and the SAOM beginning in January 2014 (Lister, *The Syrian Jihad*, 185-220); alongside the more recent inter-jihadist turf wars for control of Idlib Province, such as the prolonged, on-and-off fighting (2017-2019) between *Hayat Tahrir al-Sham* (formerly JAN) and the *Syrian Liberation Front* (incorporating *Ahrar al-Sham* and the *Nour al-Den al-Zenki Movement*, allied with the *Suqour al-Sham Brigades*) (“Islamist insurgents clash across Syria’s Idlib,” *Reuters*, dated July 19 2017. Accessed January 18 2021. Available at: <https://www.reuters.com/article/uk-mideast-crisis-syria-idlib/islamist-insurgents-clash-across-syrias-idlib-idUKKBN1A40VD>); “Clashes continue in the abolition war between Hayyaat Tahrir al-Sham and factions working in the Syrian north,” *Syrian Observatory for Human Rights*, dated February 28 2018. Accessed January 18 2021. Available at: <https://www.syriaahr.com/en/85921/>); the war between *Hayat Tahrir al-Sham* and its emergent pro-al-Qaeda splinter faction *Hurras al-Din* in April 2018 (Sultan al-Kanj, “Jihadist In-fighting and the Birth of Horas ad-Deen,” *Chatham House*, dated April 2018. Accessed January 18 2021. Available at: <https://syria.chathamhouse.org/research/jihadist-in-fighting-and-the-birth-of-horas-ad-deen>) and again in June 2020 (Sirwan Kajjo, “Powerful Islamist Group Intensifies Crackdown on Jihadists in Syria’s Idlib,” *VOA News*, dated June 28 2020. Accessed January 18 2021. Available at: <https://www.voanews.com/extremism-watch/powerful-islamist-group-intensifies-crackdown-jihadists-syrias-idlib>); etc.

¹⁸⁴⁰ In Chapter 3.

However, while optimism over the demise of this latest destabilising and violent ideology/movement may not be overly naïve, it would be certainly naïve to consider Lebanon's woes behind it. As noted from my IV causation model (chapter 6), the grievances (underlying and episodic) afflicting the Sunni-Lebanese menu people have not been resolved, while the chronically volatile HSC-VSC nexus remains untouched and as volatile as ever. Accordingly, we can likely expect further recurrent episodes of IV, should underlying grievances and social contract breakdowns co-occur with the emergence of new or rejuvenated movements willing and able to lead revolt against it. The question remains: *who* will lead it? Will the current non-violent, ecumenical protest movement persist, managing to convince former Islamist supporters of the veracity of their radically different diagnostic, prognostic, and solidarity framings of the situation? Will IS and its ilk, for the second time in its history recuperating in the 'vanguard phase', resurge once more to say, "we told you so?", or will it be led by a new ideology/movement we have yet even to notice fomenting in the shadows?

7.5. Conclusion:

From these case-studies – again producing contextually-bounded, pre-generalisable explanations – we can abstract a more general statement that might be tested, substantiated, and refined through comparison with additional case-studies, eventually contributing to a new IV paradigm:

Firstly, I have affirmed the essentially sincere and rational (if often misguided) nature of ideological conceptualisation and indigenisation, challenging the (often implicit) frequent assumption that ideology architects are somehow Machiavellian deceivers pursuing self-serving, totalitarian ends, or irrational bigots refusing to join the march of progress.

Secondly, I have begun to offer a framework into which we can more methodologically integrate both conservative and progressive paradigm insights. As noted from the previous chapter, however, progressive paradigm insights – particularly those of a Gramscian/Trotskyian bent – are affirmed as of primary importance. Ideologies are rarely conceived or naturalised absent genuine grievances, and periods of macroscopic legitimacy crises are required to create the class of 'rational hedgers' that can become an movement's mass base – should it prove successful in ideological competition with its rival. Only at this stage will that ideology/movement gather enough momentum that it becomes the

default vehicle for both progressive paradigm-style 'rational hedgers' seeking redress of grievances, and conservative paradigm 'radicalisees' seeking psychological self-actualisation, etc.

Thirdly, I have begun to develop a stock of variables/mechanisms responsible for promoting or constraining an ideologies/movements likely popularisation, adding to Trotsky's embryonic reflections, and inviting further empirical and theoretical additions, refinements, and explanations.

Finally, in terms of countering/preventing IV, I affirm my earlier critique of the conservative paradigm's reactionary, symptom-busting interventions, and broadly affirm the progressive paradigm's grievance-based approach. Preventing the grievances which prompt the construction and indigenisation of ideologies is vital, for absent those grievances – and even more so absent those legitimacy crises – such ideologies/movements will not exist to become beacons for 'rational hedgers' or 'radicalisees' in the first place. I have, moreover, helped zero in on the specific kind of grievances most conducive to IV/ideological-popularisation (social contract breakdowns that make 'surrogate' contracts a matter of emergency as people struggle to secure basic everyday needs and security), thus helping to direct and prioritise grievance-addressing interventions. This endorses a more sympathetic evaluation of the logic underpinning 'new' COIN, as meeting basic needs like essential services and security really can create stability/breathing space sufficient to begin working on addressing longer term, more systemic issues. I have also identified that, when ideologies/movements lose support, it is typically on account of their own failures. In particular, they are most likely to lose support when they 1) lose their vitality as anti-establishment forces (either through military subjugation, moderation of leadership, co-opting, loss of cohesion/infighting, etc.) and - most importantly if military subjugation etc. is not to produce increased sympathy for that movement – that 2) movement leaders discredit themselves by conducting themselves in such ways that can appear self-serving, corrupt, or otherwise in contradiction to the spirit of the ideology they claim to champion. I can thus affirm the potential of extant movement-centric remedial interventions that seek to exploit the 'say-do-gap' between movement claims and actions¹⁸⁴¹, while stressing that they be considered tertiary activities after grievance resolution.

¹⁸⁴¹ See chapter 1 and 3.

Conclusion:

8.

This study sought to respond to the endemic lack of clarity and consensus afflicting academic and policy discussions on the causes of IV and, by extension, the appropriate means for preventing/containing it. Proposing a need to ‘reset’ a debate that has become intractable through generations of entrenchment and a cocktail of political, ideological, and even cultural interests, assumptions, preoccupations, narratives, and entanglements, I proposed and demonstrated how GA and CHA can, in conjunction, contribute towards this end. By using GA, I proposed, we can help denaturalise the assumptions of the two main warring camps – or paradigms – by revealing the extra-methodological origins of those assumptions. By using CHA, I suggested, we can work – gradually and collaboratively – towards the construction of a new, more methodologically-rigorous paradigm, the revised foundational assumptions of which can both premise further research and help integrate and resituate theories from both extant paradigms.

As stressed throughout, this research had ambitious aspirations, but humble expectations. GA reaps its best results when undertaken by multiple scholars entering a dialectical discussion committed to balancing each other’s propensities towards human error (particularly ideological intrusion into analytical ethos). Likewise, CHA can only advance knowledge incrementally, collaboratively, and dialectically, with individual efforts capable of advancing only hypotheses to be tested, substantiated, refined, and built upon by further, complementary research. While my demonstrations in this study have helped kickstart this process, I have so far yielded little more than an excavatory blueprint.

Nevertheless, my demonstrations have, I believe, succeeded in both providing food for the thought that might both give pause to the currently ferocious debate over the causes of IV, and constructing a methodologically-rigorous hypothesised new IV paradigm that future research might refine and build upon:

8.1. Giving pause to current debates:

Part I's GA demonstrated that our existing IV paradigms – conservative, progressive, and hybrid – rest on shaky foundations. Far from being rooted in the kind of methodological rigour typically expected of social-scientific research, these paradigms are rooted in a political contest between revolutionaries seeking to legitimise and promote (their) IV and reactionaries seeking to delegitimise and curtail it. Thus, the former emphasised the role of grievances while minimising affective dynamics, the latter did the inverse. Over time, intertwining with folk narratives, broader cultural ideologies, and popular preoccupations and moral panics, both schools of thought coalesced into 'common sense' for those who adhered to them, cementing into paradigms that, like the paradigms conceptualised by Kuhn, serve to direct and constrain all research built upon them. This is of huge consequence, as even the most methodologically-rigorous research built upon faulty paradigms can only produce faulty conclusions. While the findings of my CHA (discussed below) would suggest that 'faulty' is far too harsh a term for either paradigm's contributions to the field, it is certainly apt to warn that both paradigms succeed in telling only 'half the story' of IV, and neither clarity nor consensus will be achieved without finding a methodologically-rigorous way of telling both halves of the story at once. Attempts to do just this in the hybrid paradigm have, however, succeeded only in telling two distinct stories and attributing them, arbitrarily, to two distinct types of IV perpetrator. This then became unstuck when the assumed distinction between these two types of perpetrator appeared to blur in the 'extremist' conflagrations in post-2011 Syria and Iraq. This, in turn, led to a crisis of confidence in all of our extant paradigms, resulting in an 'anarchic turn' in IV theorising, as demonstrated in the confused and chaotic theorising and commentary on the IS phenomenon.

Likewise, my general critique of these paradigms has demonstrated their insufficiency for the task at hand. While the conservative and progressive paradigms each seem to have much to offer, they both also suffer from substantial blind-spots: the conservative paradigm being blind to macroscopic, temporal and spatial variations in IV and the progressive paradigm being blind to affective dynamics. The hybrid paradigm, meanwhile, in its attempt to take the best features from both traditional paradigms, in fact only takes on their weaknesses; a lack of systematic synthesis resulting in the drawing of

unqualified, arbitrary distinctions between reductive differing ‘types’ of IV perpetrator.

While further GA by other scholars would certainly help refine my critique, my critique alone should promote sufficient scepticism to prompt us to re-evaluate how confidently we maintain and defend our choice paradigms. In the same way, it should unite us in agreement that a methodologically-rigorous new paradigm is necessary, even if not all will necessarily agree with my proposed usage of CHA to do so.

I do believe, however, that Part II’s CHA demonstration provides a strong case for using CHA in the way that I have proposed:

8.2. Hypothesising a new IV paradigm:

Based on the findings of my CHA of the three Sunni-Lebanese case-studies alone, I can offer the following extremely provisional hypothesis for a new paradigm:

8.2.1. Foundational assumption 1: on IV causation:

From our explorations of chapter 6, we can abstract the following hypothesised foundational assumption:

IV becomes likely when social contract crises interact with availing ideologies/movements. Specifically, when movements offer deliverance to populations rendered desperate for change – often *any* change – by urgent threats to their physical security (e.g., due to heightened security dilemmas) and/or their ability to provide for their everyday essential needs (e.g., food, employment, medicine, amenities, etc.).

Social contract crises absent availing ideologies/movements generally create *status quo* realism, in which grievances are fatalistically endured as no other options for ordering state and society can be conceived or deemed feasible. At worse, when such social contract crises reach ‘emergency’ proportions (i.e., when the aggrieved face real/perceived imminent attack, starvation, etc.), sporadic, impulsive, and broadly directionless expressions of frustration (e.g.,

demonstrations, riots, strikes, shootouts, etc.) making demands *within* the framework of the establishment ideology will likely ensue.

Availing movements absent social contract crises will likely struggle to garner mass support, as the population will likely defer to denunciations/demonisations of the movement made by establishment ideology defenders. If no significant grievances exist, there will be little reason for the population to relate to or take seriously the movement's claims, making it appear an irrational troublemaker in their eyes. If grievances exist but the social contract remains intact, the population is less likely to consider those issues as injustices (as opposed to inevitable realities of life), nor to risk life and liberty, and greater destabilisation and dislocation, by going to war against it. Essentially, when grievances pervade, but social contracts hold, resistance is a luxury, not an emergency. There will, moreover, be little reason to trust an obscure movement over familiar, trusted traditional elites.

Finally, when social contract crises co-occur with availing movements, IV becomes likely. The social contract crisis creates conditions in which the population seeks alternative leadership, provision, and protection as a matter of 'emergency', and availing movements – even previously obscure, alien ones - can plausibly present themselves as willing and able to provide for those needs, thus breaking *status quo* realism, and helping to shift demands from *within* the establishment ideology framework to beyond it.

8.2.2. Foundational assumption 2: on ideological popularisation:

From our explorations of chapter 7, we can abstract the following hypothesised foundational assumption:

Ideological popularisation is a highly-complex and contingent affair, but essentially results from a particular movement outselling the establishment and rival anti-establishment movements in plausibly presenting itself as most capable of providing for the immediate needs (usually protection, liberation, and essential services) of the aggrieved population. Competing movements engage in a highly-dialectical contest, winning and losing 'points' variously on account of the relative appeal/relatability/accessibility of their ideology, apparent strengths and capabilities of their organisation (i.e., their ability to deliver materially), cumulative and interacting instances of endearing and alienating behaviour, etc.

8.2.3. Foundational assumption 3: on the appropriate means for mitigating against IV:

Also from chapter 7, we can abstract a final hypothesised foundational assumption:

Ideologies/movements begin losing support when they visibly cease to fulfil their stated and implicit functions:

Stated functions include providing: 1) physical security and potential liberation from tyranny; 2) essential everyday services; 3) just, ideologically-pure, morally-upstanding, courageous, altruistic, un-corrupt, benevolent, efficient, prototypical, unifying leadership; 4) military courage, resources, organisation, and capability, etc.

Implicit functions, the identification of which require further 'black-box' exploration (see below), potentially include: 1) provision of positive identity information; 2) provision of a sense of control, efficacy, moral and ontological certainty, self-esteem, dignity, pride, comradeship, community, etc.

It is breakdowns in these functions which counter-IV interventions should seek to capitalise upon and/or expedite. This might include 1) movement-discrediting interventions seeking to amplify the movement cadres' own alienating behaviours (e.g., sensitively publicising instances of self-servitude, corruption, injustice, brutality, warlordism, incompetence, etc.); 2) kinetic military interventions focused on militarily containing/defeating movements so that supporters lose faith in their ability to protect and liberate them (though, as discussed below, this must be implemented alongside movement-discrediting and grievance resolution to be effective and prevent negative blowback).

Additionally, once adherents have lost faith in the movement – ushering in a new period of fatalistic *status quo* realism - disengagement is facilitated by a resolution of the social contract crisis that created the 'emergency' conditions the movement first availed itself to resolve/transcend. Thus, social contract crisis-alleviating interventions, of the kind envisioned by 'classical'/'new' COIN/stabilisation doctrines, are valuable (particularly security dilemma-alleviating/Faustian bargain-breaking and essential service provision interventions) to reduce these 'emergency' conditions, reducing the perceived urgency for fundamental change and thus buying breathing space for more

comprehensive conflict resolution – which should focus on overhauling extant volatile social contracts – to take place.

8.3. Implications for extant literature:

Additionally, though again only provisionally, my GA and CHA demonstrations have contributed to evaluating some key assumptions in IV thought, reifying some, partially challenging others, while calling for others to be shelved until further research can affirm their utility:

8.3.1. Reified wisdoms:

My exploration of IV causation vindicated and began to refine progressive sub-paradigms like hegemony sub-paradigm; ‘exploitation/mobilisation’ sub-paradigm; resource mobilisation theory; and interest group conflict theory.

My exploration of ideological popularisation vindicated and began to refine Trotsky’s loose conceptualisation of dialectical inter-movement competition, and helped begin to integrate, situate, and delimit into this Trotskyite approach progressive sub-paradigms such as the organic sub-paradigm; ideology-centric sub-paradigm; movement-centric sub-paradigm; and relational sub-paradigm.

My exploration of ideological de-popularisation has helped rehabilitate the somewhat tarnished reputation of ‘classical’ and ‘new’ COIN and Stabilisation doctrines, while stressing that these interventions, while valuable, only address half of the problem and must be understood as such. Similarly, it vindicated the importance of movement-discrediting interventions (while again insisting upon its essential integration with grievance-addressing resolutions) and helped situate, define, and delimit the purpose, efficacy, and risks of kinetic operations against anti-establishment movements.

8.3.2. Challenged wisdoms:

Other extant wisdoms have been challenged by our research, insisting on the need to resituate and delimit often essentialised conservative sub-paradigms; the need to explicate and operationalise key terms (particularly ‘ideological motivation’, as noted), and the need to relegate certain key remedy repertoires (notably ideology-discrediting and resilience building) to tertiary positions in counter-IV repertoires, playing at best an accompanying role to the more important efforts of social contract crisis resolution and movement-discrediting.

8.3.3. *Shelved wisdoms:*

I have found it necessary to retire or at least shelve certain problematic yet frequently taken-as-granted constructs and nomenclature – particularly from the dominant RVE iteration – at least until further research, based on our improved third paradigm premises – has helped to methodologically resituate and reinterpret them. In particular, this comes down to the concepts of ‘radicalisation’ and microscopic ‘vulnerability’ and the tendency to study movement according to non-socio-scientifically-derived IV ‘imaginaries’ which I have substituted with IV ‘trajectories’ and ‘arenas’.

8.3.4. *Key lacunae addressed:*

Finally, albeit only embryonically, I have begun to address key lacunae that have served to divide traditional IV scholarship:

- 1) The issue – raised and answered in different ways by both extant paradigms – as to why grievances only rarely produce IV, more often promoting apathy. We have begun to address this through our identification of the necessity but insufficiency of grievances: a lack of attendant availing movement being likely to promote fatalistic *status quo* realism; a lack of social contract crisis likely to promote apathy. The movement-social contract crisis nexus is crucial, creating both conditions that render resistance an emergency rather than a luxury, and providing a *status quo* realism-busting vehicle for mobilising and facilitating that resistance.
- 2) The issue – raised particularly by the Syrian conflict – as to how ‘rational hedgers’ can come to hold an ideology passionately and stubbornly, to the point of engaging in excessive violence in its name. We have begun to address this in our identification of the ‘attachment’ phase of ideological popularisation. While the precise mechanisms of attachment require significant further research, we can have a jumping-off point for situating that research.

8.4. **A need for further research:**

Two lines of effort would help to substantiate and refine upon this hypothesis:

In the first instance, this requires applying CHA to additional case-studies to help substantiate, embellish, refine, and delimit the proto-paradigm outlined above. Crucial to this process will be explicating alignments and/or differentiations between cases: discerning how and why episode X aligns with and/or differs from episode Y. The focus here should be on alignments/differences regarding IV 'arenas' and trajectories. This will enable us to create categorisable 'concepts with adjectives' through which to methodologically group and differentiate instances according to concretely-identifiable criteria, which will both aid in extrapolating and delimiting causation, and in appropriate analogous reasoning for emergent policy issues.

While these 'concepts of adjectives' will only emerge upon comparing and contrasting our Sunni-Lebanese cases to additional cases, feasible hypothetical distinctions might include:

- *'Trajectories with adjectives'*:
 - Ideological popularisation prior to conflict outbreak vs. popularisation post conflict outbreak.
 - Popularisation where competing movements are present vs. popularisations absent competing movements.
 - Etc.
- *'Arenas with adjectives'*:
 - Communally-aligned IV vs. non-communally-aligned IV.
 - IV within democracies vs. IV within autocracies.
 - Etc.

Additionally, this study has highlighted numerous lower-level lacunae, known-unknowns, and causal black-boxes into which we must develop new, improved and/or resituated middle-range theories and mechanisms – the ones I have proposed being embryonic, at times speculative, and likely constitute merely a few of many dynamics at play. Similarly, in both my critique and CHA I have begun to develop differentiating concepts which require further exploration, substantiation, and refinement. Thus, an expansive future research agenda has begun to unveil itself, one likely only to grow as the 'third' paradigm develops with new case studies hypothesising new mechanisms or refining/redirecting those proposed from earlier CHA. Research tasks already identifiable include:

- 1) Further exploring different motivational profiles in their different stages: e.g., conservative-style ‘radicalisees’ joining a movement during the vanguard stage vs. the momentum phase; rational hedgers during the momentum stage vs. the attachment stage, etc.
- 2) Further exploring, substantiating, refining, and explicating newly-identified motivational profiles (architects, indignisers, salonisers, rational zealots).
- 3) Further exploring causal black-boxes within each newly-identified stage (e.g., expanding upon the mechanisms of ‘attachment’ or ‘disaffection’, etc.), both by integrating/resituating/reinterpreting/delimiting extant sub-paradigms and middle-range theories (‘hanging them on the causal tree’); further exploring the embryonic mechanisms proposed in my Sunni-Lebanese analysis (e.g., the ‘Robespierre effect’ during the ‘attachment’ phase); and developing fresh middle-range theories based on inductive ‘clues’ drawn from our empirical analysis.
- 4) Further exploring newly-identified differentiations of commonly used, under-operationalised terms; e.g., further exploring our division of ‘ideological motivation’ into *ideological persuasion* and *post facto rationalisation*; further exploring our division of ‘extremism’ into ‘extreme beliefs’ and ‘extreme attitudes towards beliefs’, etc.
- 5) Further exploring the interactions of the various newly-identified variables involved in ideological competitions, e.g., do ideology-centric variables trump movement-centric variables? Are alienating behaviours more influential than redeeming ones? etc.

8.5. Provisional wisdoms for urgent problems:

As we have stressed throughout, the construction and embellishment of a ‘third’ IV paradigm will, by necessity, be a long and arduous process and, as our future research agenda outline demonstrates, we are still as much in the process of identifying lacunae and known-unknowns as we are in forging ahead with producing new theories. But this will be of small help or comfort to those tasked with confronting urgent extant IV threats requiring immediate action.

The task confronting such practitioners and policymakers is an unenviable one. My findings – consonant with, though hopefully more nuanced and appropriately situated and delimited than, the extant hybrid paradigm – suggests that they are confronted by complex movements with adherents animated by a

multitude of motivations, from material to abstract, noble to nefarious, pro-social to anti-social, altruistic to individualistic, etc. Moreover, as my model suggests, the Pandora's box of IV is one not easily closed, and adherents who originally may have been 'rational hedgers' may now have hardened in their beliefs and their resolve, their thinking rendered increasingly two-dimensional by ideological socialisation, group-think and other similar dynamics; their choice ideology's narratives seemingly vindicated by their lived experiences; their solidarities, identities, and animosities burnished in the trenches; now suspicious of outreach and appeals to reason, and so alienated from the *status quo* – and invested in the ideology promising to replace it – as to be completely unyielding to within-establishment ideology compromise or material inducements. All the while, the movements operate in environments rich in spoilers, from governments ranging from the incompetent to the tyrannical, communal enemies rendered intractable by fear or vengeance, and public opinion – domestic and foreign – not always amenable or even tolerant towards measured pragmatism. IV – upon reaching 'momentum' and 'attachment' in the wake of a social contract breakdown – thus becomes an unyielding beast, practically personifying the term "wicked problem"¹⁸⁴².

Yet my findings from this study, how ever provisional they may be at this stage, are not completely bereft of offerings for these more urgent and developed threats:

- Where IV is driven/inflamed by a security dilemma, acknowledge and alleviate it. Here the Faustian bargain-busting logic of 'new' COIN is vindicated. However, the IV should not be *reduced* to these security dilemmas - as 'new COIN' has been accused (not always fairly) of doing – comprehensive conflict resolution must follow.
- Where IV is driven by a social contract breakdown, identify the cause of strain and, depending on the depth of the fragility, strengthen or overhaul the social contract. Again, as a short-term solution, 'classical'/'new' COIN and Stabilisation imperatives on ensuring the supply of daily essentials and security is vindicated as, by providing for the urgent needs of the mass of rational hedgers, anti-establishment violence ceases to be an emergency for them, becoming instead a (relative) luxury. In this way,

¹⁸⁴² As originally defined in Horst W.J. Rittel and Melvin M. Webber, "Dilemmas in a general theory of planning," *Policy Sciences* 4 (1973): pp. 155-169.

'classical'/'new' COIN/Stabilisation interventions can create enough short-term stability to work on longer term conflict resolution.

- Similarly, attempt to nip IV episodes in the bud prior to their reaching the 'attachment' phase, by immediately acting to address social contract breakdowns. In this crucial brief window, the mass of rational hedgers are more likely to be amenable to a restored/tweaked establishment ideology social contract, material inducements, etc. Such inducements quickly lose their efficacy once 'attachment' is reached. As noted, however, it is futile to restore a social contract that is fundamentally volatile. In such cases, overhauling is always preferable to restoring.
- If the ideology/movement has reached the 'attachment' phase and rational debate, material inducements, and establishment ideology social contract-restoration, etc., no longer appears feasible to movement adherents, then the surest root to disaffection is in the actions of the movement's cadres. Movements should be watched closely for potentially-alienating behaviours (self-servitude, infighting, hypocrisy, etc.) and those behaviours sensitively amplified. This thus vindicates and further informs movement-discrediting interventions. However, this must accompany conflict resolution efforts, otherwise the disgraced movement will only create a vacuum into which other movements may step – whether immediately or after a period of volatile *status quo* realism.
- Avoid/consider as tertiary ideology-discrediting interventions. While our model leaves room for a minority of adherents being animated by *ideological persuasion*, the vast majority – architects, indigenisers, salonisers, rational zealots, and rational hedgers – are animated by *grievances/post facto rationalisation*. Moreover, the findings of the 'attachment' phase, while requiring much further exploration, strongly suggest that such ideology-discrediting interventions may be dismissed out of hand as obvious manipulation by defenders of a fundamentally oppressive/exploitative establishment. Therefore, if ideology-discrediting interventions are even valid, they will, like the more reliable movement-discrediting interventions, only create an ideological vacuum absent conflict resolution; addressing symptoms, not causes.
- Finally, employ military interventions with care. Militarily defeating a movement can aid in degrading its appeal (by demonstrating its inability to

deliver upon its promises) but, if conducted absent movement-discrediting interventions and grievance/conflict resolution, this will only produce volatile *status quo* realism (until the next ideology/movement emerges) at best and make martyrs of the movement and validate its narratives at worst.

All this being said, our only truly sustainable option – upon which our efforts towards preventing potential future IV episodes must rest - is to prevent the Pandora's box from opening in the first place: to create societies in which anti-establishment ideologies have no reason to be conceived, yet alone proliferate. This may appear naïve and simplistic. A world truly free of grievances – real or perceived – is almost certainly a chimera. But our model – provisionally - suggests several helpful tendencies that might help shape longer term, preventative policies:

- Ideological conception and indigenisation appears to occur in response to legitimate grievances – even if those grievances are diagnosed in profoundly flawed/irrational ways. Thus, while not necessarily always the case, ideologies are almost certainly far less likely to emerge/indigenise absent profound extant grievances. Robust social contracts are thus our first port of call in reducing the likelihood of ideological conception/indigenisation.
- By extension, absent the existence of ideologies/movements to join/adhere to, individuals, regardless of their motivations, will be denied violent avenues for grievance resolution/self-actualisation/chauvinism, etc. Once again, social contracts that are robust, humane, and conducive to cooperation and collective and individual material and psychological flourishing can likely provide other, healthier, less destabilising, and more enduring avenues for such impulses.
- While it may be near impossible to prevent *some* ideologies/movements from emerging – even in the most utopian society – our model suggests that they are unlikely to acquire mass support absent a social contract breakdown. Moreover, for as long as the social contract holds firm, our model tentatively suggests that troublesome movements can be kinetically apprehended and prosecuted without prompting popular sympathy for the movement or outrage towards the apprehending

authorities – in contrast to post-popularisation/social contract breakdown apprehensions. This should not, however, greenlight *purely* kinetic responses. It is still essential to identify why such movements are emerging and gaining even marginal adherents, so that more sustainable, preventative solutions may be sought.

8.6. Closing remarks:

As noted, much further work is required before we can truly consider our fledgling paradigm to be a reliable guide for further research and future policymaking. However, if there is one thing it seems we can immediately take away from this study, it is that our surest road to preventing IV lies in opening our ranks, not closing them. This requires, first of all, better knowing ourselves so that we might better know our 'enemy': We must examine and relinquish our culturally/ideologically-conditioned delegitimising assumptions, imaginaries, and folk devils so that we may understand the IV perpetrator as a reflection of themselves rather than of ourselves. We must become more open to unfamiliar conceptions of legitimacy and justice, so that we no longer assume arbitrary binaries between democratic, secular humanism and its presumed totalitarian, oppressive, and irrational antonyms. We must become less defensive towards criticisms of our own ideologies, acknowledging that a system we hold dear can be flawed without being rotten; that opposition to it can rationally reflect those flaws, rather than being irrational rage projected tragically upon it; and that even the micro-motivated – the psychologically-unfilled – might have been denied that fulfilment by macroscopic conditions. We should learn to consider – by splitting ideologies into their component parts – that an ideology's repellent prognoses might reflect grievances deserving of more sympathy; that its irrational diagnosis may be a flawed attempt to account for rational grievances. And we should remember that, just as we attempt to resolve conflict and animosities in our day-to-day lives with compassion, compromise, and communication, our attempts to confront IV should similarly rest on peace-making rather than merely attempting to stamp out every threat with brute force. Failure to reorient our thinking in this way can only encourage us to ignore the grievances upon which movements grow their mass bases, and to perpetuate the polarisations, dehumanisations, and simplistic dichotomisations of friend from foe, victims and villains, upon which ideologies depend. It is ironic that, as our current IS-induced moral panic once

again places Islam in the docks for its alleged role in motivating IV¹⁸⁴³, the Qur'an may prescribe better than any other voice the most reliable path to ending it: *"Good and evil cannot be equal. Repel evil with what is better and your enemy will become as close as an old and valued friend"* (Qur'an 41:34).

¹⁸⁴³ See my overview on scholarly and journalistic commentary attempting to attribute causation to IS in Appendix A.

Appendix A: Commentary/literature on the self-styled Islamic State: descriptive overview

9.

Extant literature and commentary on IS provides a telling illustration of the prevailing state of ‘post-thesis prognostic/diagnostic anarchy’ discussed in chapter 3. As the following breakdown demonstrates, commentary on IS not only varies hugely in its conceptualisations, causal attributions, and recommended remedial interventions, many such conceptualisations, attributions, and recommendations directly and explicitly contradict each other. Moreover, these arguments are – for the most part – built on precisely the impulsive, idiosyncratic, mono-causal/reductionist, ahistorical historicist analogy-hunting, and/or methodologically problematic grounds discussed in our earlier analysis of the ‘anarchy’:

9.1. On the kind of phenomenon IS constitutes:

- A revolution?¹⁸⁴⁴
- A counter-cultural movement?¹⁸⁴⁵
- An apocalyptic/millenarian movement?¹⁸⁴⁶
- A ‘death cult’?¹⁸⁴⁷

¹⁸⁴⁴ Dominic Tierney, “ISIS against humanity,” *The Atlantic*, dated October 12 2015. Accessed January 20 2020. Available at: <https://www.theatlantic.com/international/archive/2015/10/war-isis-us-coalition/410044/>; Scott Atran, “ISIS is a revolution,” *Aeon*, dated December 15 2015. Accessed December 10 2019. Available at: <https://aeon.co/essays/why-isis-has-the-potential-to-be-a-world-altering-revolution>; Walt, “ISIS as Revolutionary State,”; Craig Whiteside, “The Islamic State and the Return of Revolutionary Warfare,” *Small Wars & Insurgencies* 27(5) (2016): pp. 743-776; Stathis N. Kalyvas, “Is ISIS a Revolutionary Group and if yes, what are the implications?” *Perspectives on Terrorism* 9(4) (Aug., 2015): pp. 42-47; Paul B. Rich, “How revolutionary are Jihadist insurgencies? The case of ISIL,” *Small Wars & Insurgencies* 27(5) (2016): pp. 777-799.

¹⁸⁴⁵ Atran, “ISIS is a revolution”.

¹⁸⁴⁶ Zack Beauchamp, “ISIS’s dead-serious obsession with the apocalypse, explained,” *VOX*, dated August 21 2015. Accessed December 10 2019. Available at: <https://www.vox.com/2015/8/21/9183419/isis-iraq-apocalypse>; Aaron A. Hughes, “If Islamic State is based on religion, why is it so violent?” *The Conversation*, dated February 17 2016. Accessed December 11 2019. Available at: <https://theconversation.com/if-islamic-state-is-based-on-religion-why-is-it-so-violent-52070>; Gray, “ISIS: an apocalyptic cult,”; Malcolm Nance, “Five ways to devastate ISIL,” *Politico*, dated March 23 2016. Accessed December 29 2019. Available at: <https://www.politico.com/magazine/story/2016/03/five-ways-to-devastate-isis-213763>

¹⁸⁴⁷ Maltby, “Like ISIS, Thomas More believed passionately in burning people alive,”; Packer, “Why ISIS murdered Kenji Goto”; Liam Byrne, “We need character education to fight the ISIS death cult,” *The Times*, dated November 17 2016. Accessed December 20 2019. Available at: <https://www.thetimes.co.uk/article/we-need-character-education-to-fight-the-isis-death-cult-mnt3zrf5c>; Eboo Patel, “Encourage and Support a ‘Big Tent Citizen’ Islam,” *The New York Times*,

- A terrorist organisation?¹⁸⁴⁸ (or not?¹⁸⁴⁹)
- A state?¹⁸⁵⁰
- An anti-modernity movement?¹⁸⁵¹
- An anti-neoliberalism movement?¹⁸⁵²
- An anti-Enlightenment movement?¹⁸⁵³
- A Fascist movement?¹⁸⁵⁴
- A medieval throwback?¹⁸⁵⁵ (or not?¹⁸⁵⁶)
- A backlash against colonialism?¹⁸⁵⁷

dated December 6 2019. Accessed December 22 2019. Available at: <https://www.nytimes.com/roomfordebate/2015/12/06/how-can-america-counter-the-appeal-of-isis/encourage-and-support-a-big-tent-citizen-islam>

¹⁸⁴⁸ Jessica Anderson, "ISIS: State or Terror Group?" *Small Wars Journal*, undated. Accessed December 11 2019. Available at: <https://smallwarsjournal.com/jrnl/art/isis-state-or-terror-group>

¹⁸⁴⁹ Cronin, for example, emphatically declares IS not to be a terrorist organisation (Kurth Cronin, "ISIS Is Not a Terrorist Group").

¹⁸⁵⁰ Ibid; Eli Berman and Jacob N. Shapiro, "Why ISIL will fail on its own," *Politico*, dated November 29 2015. Accessed December 11 2019. Available at: <https://www.politico.com/magazine/story/2015/11/why-isil-will-fail-on-its-own-213401?cmpid=sf#ixzz3sszdfu4s>.

¹⁸⁵¹ Malik, "Radical Islam, nihilist rage,"; Wood, "What ISIS really wants"; Charles Hill, "Why political Islam is winning," *Politico*, dated December 28 2014. Accessed December 29 2019. Available at: <https://www.politico.com/magazine/story/2014/12/political-islam-is-succeeding-113835>; Alexei Bayer, "ISIS and Pre-Revolutionary Russia," *The Globalist*, dated November 20 2015. Accessed January 9 2020. Available at: <https://www.theglobalist.com/isis-and-pre-revolutionary-russia/>

¹⁸⁵² Yousef Khalil, "ISIS and the Neoliberal State," *The New Context*, dated November 17 2014. Accessed January 9 2020. Available at: <https://thenewcontext.org/isis-and-the-neoliberal-state/>; Mark Fisher, "Cybergothic vs. Steampunk," *Urbanomic*, dated 2016. Accessed January 9 2020. Available at: <https://www.urbanomic.com/document/cybergothic-vs-steampunk-response-to-badiou/>

¹⁸⁵³ David Brooks, "The Nationalist Solution," *The New York Times*, dated February 20 2015. Accessed December 20 2019. Available at: <https://www.nytimes.com/2015/02/20/opinion/david-brooks-the-nationalist-solution.html?searchResultPosition=325>

¹⁸⁵⁴ Sheehi, "ISIS as a fascist movement"; Spach, "The Fascist Caliphate".

¹⁸⁵⁵ David J. Wasserstein, *Black Banners of ISIS: The Roots of the New Caliphate* (New Haven and London: Yale University Press, 2017), 13 & 26; Amir Ahmad Nasr, "ISIS isn't the real enemy. The 'Game of Thrones' Medieval mindset that birthed it is," *Medium*, dated August 27 2014. Accessed December 11 2019. Available at: <https://medium.com/@AmirAhmadNasr/isis-isnt-the-real-enemy-the-game-of-thrones-medieval-mindset-that-birthed-it-is-4888330dabac>; Adrian Lee, "The new dark ages: the chilling medieval society ISIS extremists seek to impose on Iraq," *Express*, dated June 21 2014. Accessed December 11 2019. Available at: <https://www.express.co.uk/news/world/483920/Iraq-Isis-Extremists-Dark-Ages-Muslim-Baghdad-Jihadist>; Mary Dejevsky, "Why ISIS won't actually be the huge threat of 2016," *The Independent*, dated December 30 2015. Accessed December 11 2019. Available at: <https://www.independent.co.uk/voices/why-isis-wont-actually-be-the-huge-threat-of-2016-a6791256.html>; Wood, "What ISIS really wants".

¹⁸⁵⁶ Kevin McDonald, "Islamic State's 'medieval' ideology owes a lot to revolutionary France," *The Conversation*, dated September 8 2014. Accessed December 11 2019. Available at: <https://theconversation.com/islamic-states-medieval-ideology-owes-a-lot-to-revolutionary-france-31206>; John T.R. Terry, "Why ISIS isn't medieval," *Slate*, dated February 19 2015. Accessed December 11 2019. Available at: <https://slate.com/news-and-politics/2015/02/isis-isnt-medieval-its-revisionist-history-only-claims-to-be-rooted-in-early-arab-conquests.html>

¹⁸⁵⁷ David Ignatius, "How ISIS spread in the Middle East," *The Atlantic*, dated October 29 2015. Accessed December 20 2019. Available at:

- A nihilist movement?¹⁸⁵⁸
- A Trojan Horse for Saddam Hussein loyalists?¹⁸⁵⁹
- A reawakening of an ancient, primordial Sunni-Shi'a conflict?¹⁸⁶⁰
- Part of an doctrinal civil war within Islam? Specifically:
 - Between 'extremists' and 'moderates'?¹⁸⁶¹

<https://www.theatlantic.com/international/archive/2015/10/how-isis-started-syria-iraq/412042/>; Aaron Y. Zelin, "Colonial Caliphate: The ambitions of the 'Islamic State'," *Washington Institute for Near East Policy*, dated July 8 2014. Accessed January 4 2020. Available at: <https://www.washingtoninstitute.org/policy-analysis/view/colonial-caliphate-the-ambitions-of-the-islamic-state>

¹⁸⁵⁸ Rampoldi, "God is Dead".

¹⁸⁵⁹ Christopher Reuter, "Secret files reveal the structure of Islamic State," *Spiegel*, dated April 18 2015. Accessed December 22 2019. Available at: <https://www.spiegel.de/international/world/islamic-state-files-show-structure-of-islamist-terror-group-a-1029274.html>; Liz Sly, "How Saddam Hussein's former military officers and spies are controlling ISIS," *The Independent*, dated April 5 2015. Accessed December 19 2019. Available at: <https://www.independent.co.uk/news/world/middle-east/how-saddam-husseins-former-military-officers-and-spies-are-controlling-isis-10156610.html>; Kyle W. Orton, "How Saddam Hussein gave us ISIS," *The New York Times*, dated December 23 2015. Accessed December 22 2019. Available at: <https://www.nytimes.com/2015/12/23/opinion/how-saddam-hussein-gave-us-isis.html>; Mark Perry, "Fighting Saddam all over again," *Politico*, dated April 28 2015. Accessed December 29 2019. Available at: <https://www.politico.com/magazine/story/2015/04/isil-saddam-hussein-117394#.VUCpHJN-Yqq>

¹⁸⁶⁰ Philipp Holtmann, "A Primer to the Sunni-Shia conflict," *Perspectives on Terrorism* 8(1) (Feb., 2014): pp. 142-145; Joyner, "Whack-a-Mole,."; Fred Kaplan, "Why the Middle East is still a mess a century after the Sykes-Picot Agreement," *Slate*, dated May 19 2016. Accessed June 27 2018. Available at: <https://slate.com/news-and-politics/2016/05/its-not-surprising-the-middle-east-is-a-mess-100-years-after-sykes-picot.html>; Mohamed Elshinnawi, "Sunni-Shi'ite Divide Threatens Middle East Stability," *VOA News*, dated August 23 2014. Accessed June 3 2018. Available at: <https://www.voanews.com/a/sunni-shiite-divide-threatens-stability-of-middle-east/2424584.html>; Mark Thompson, "Fighting in Iraq and Afghanistan echoes the 30 Years' War," *Time*, dated December 22 2015. Accessed December 8 2019. Available at: <https://time.com/4159442/iraq-afghanistan-thirty-years-war/>; Michael Crowley, "The End of Iraq," *Time*, dated June 19 2014. Accessed December 21 2019. Available at: <https://time.com/magazine/us/2899479/june-30th-2014-vol-183-no-25-u-s/>; John Hall, "Sunni and Shia Muslims: Islam's 1,400-year-old divide explained," *The Independent*, dated January 4 2016. Accessed December 20 2019. Available at: <https://www.independent.co.uk/news/world/middle-east/sunni-and-shia-islams-1400-year-old-divide-explained-a6796131.html>; Domonic Selwood, "On this day in 661 the new religion of Islam split in two - when Caliph Ali is murdered with a poisoned sword," *The Telegraph*, dated January 29 2018. Accessed December 20 2019. Available at: <https://www.telegraph.co.uk/news/2018/01/29/day-661-new-religion-islam-split-two-caliph-ali-murdered-poisoned/>; Aamna Mohdin, "How the Shia-Sunni split in 632AD led to Iran and Saudi Arabia's power games today," *Quartz*, dated January 5 2016. Accessed December 20 2019. Available at: <https://qz.com/585647/how-the-shia-sunni-split-in-632ad-led-to-iran-and-saudi-arabias-power-games-today/>; Willis L. Krumholz, "America Shouldn't Take Sides in the 1,400-Year-Old Sunni-Shia Conflict," *Defense One*, dated November 22 2017. Accessed December 20 2019. Available at: <https://www.defenseone.com/ideas/2017/11/america-shouldnt-take-sides-1400-year-old-sunni-shia-conflict/142736/>; Paul Valley, "The vicious schism between Sunni and Shia has been poisoning Islam for 1,400 years - and it's getting worse," *The Independent*, dated February 19 2014. Accessed December 20 2019. Available at: <https://www.independent.co.uk/news/world/middle-east/the-vicious-schism-between-sunni-and-shia-has-been-poisoning-islam-for-1400-years-and-its-getting-9139525.html>

¹⁸⁶¹ Charles Krauthammer, "The great Muslim civil war — and us," *The Washington Post*, dated June 22 2017. Accessed June 4 2018. Available at: https://www.washingtonpost.com/opinions/the-great-muslim-civil-war--and-us/2017/06/22/80a32be6-56c1-11e7-a204-ad706461fa4f_story.html?utm_term=.a2acf4e10a0f

- Between medieval throwbacks and modernisers?¹⁸⁶²
- Between exclusivists and pluralists?¹⁸⁶³
- Between theocrats and nationalists?¹⁸⁶⁴
- Between reactionaries and reformers?¹⁸⁶⁵
- Between Islamists and secularists?¹⁸⁶⁶
- A dispute in which IS' Wahhabism constitutes an Islamic 'Reformation?'¹⁸⁶⁷
- A combination of all/some of the above?¹⁸⁶⁸

9.2. On why IS behaves so brutally:

- For instrumental reasons:
 - As part of a calculated asymmetric warfare strategy based on fear and deterrence?¹⁸⁶⁹

¹⁸⁶² Haqqani, "Islam's Civil War".

¹⁸⁶³ Tarek Fatah, "Here's the Real War within Islam," *Middle East Forum*, dated October 6 2015. Accessed June 3 2018. Available at: <https://www.meforum.org/articles/2015/here-s-the-real-war-within-islam>

¹⁸⁶⁴ Allouche, "The War inside Islam".

¹⁸⁶⁵ Ayaan Hirsi Ali, "A problem from heaven: why the United States should back Islam's Reformation," *Foreign Affairs* 94(4) (Jul./Aug., 2015), 37.

¹⁸⁶⁶ John M. Owen, "From Calvin to the Caliphate: What Europe's Wars of Religion tell us about the modern Middle East," *Foreign Affairs* 94(3) (May/Jun., 2015), 77 & 79.

¹⁸⁶⁷ Maltby, "Like ISIS, Thomas More believed passionately in burning people alive,"; Simon, "ISIS is the Islamic 'Reformation',"; Sami Zubaida, "Islamic Reformation?" *Open Democracy*, dated January 5 2016. Accessed December 15 2019. Available at: <https://www.opendemocracy.net/en/north-africa-west-asia/islamic-reformation/>; Mehdi Hassan, "Why Islam doesn't need a reformation," *Guardian*, dated May 17 2015. Accessed December 15 2019. Available at: <https://www.theguardian.com/commentisfree/2015/may/17/islam-reformation-extremism-muslim-martin-luther-europe>; Mustafa Akyol, "The Islamic World doesn't need a Reformation," *The Atlantic*, dated October 31 2017. Accessed December 15 2019. Available at: <https://www.theatlantic.com/international/archive/2017/10/muslim-reformation/544343/>; Tom Holland, "We must not deny the religious roots of Islamic State," *The New Statesman*, dated March 17 2015. Accessed December 20 2019. Available at: <https://www.newstatesman.com/politics/2015/03/tom-holland-we-must-not-deny-religious-roots-islamic-state>

¹⁸⁶⁸ Peter Krause, "A State, an Insurgency, and a Revolution: Understanding and defeating the three faces of ISIS," in *The Future of ISIS: Regional and International Implications*, eds. Feisal al-Istrabadi and Sumit Ganguly (Washington, D.C.: Brookings Institution Press, 2018); Stathis N. Kalyvas, "The logic of violence in the Islamic State's War," in *Iraq between Maliki and the Islamic State*, ed. Marc Lynch (Washington, DC: Project on Middle East Political Science, 2014), 36; Stern, "The Islamic State Paradox".

¹⁸⁶⁹ Scott Atran, "ISIS: The durability of chaos," *The New York Review of Books*, dated July 16 2016. Accessed January 10 2020. Available at: <https://www.nybooks.com/daily/2016/07/16/nice-attack-isis-durability-of-chaos/>; Walt, "ISIS as Revolutionary State,"; Hassan Hassan, "Isis has reached new depths of depravity. But there is a brutal logic behind it," *The Guardian*, dated February 8 2015. Accessed December 11 2019. Available at: https://www.theguardian.com/world/2015/feb/08/isis-islamic-state-ideology-sharia-syria-iraq-jordan-pilot?CMP=share_btn_tw; Don Winslow, "What ISIS learned from the cartels," *Daily Beast*, dated July 8 2015 (Updated July 12 2017). Accessed December 11 2019. Available at: <https://www.thedailybeast.com/what-isis-learned-from-the-cartels>; John Gray, "The Anomaly of Barbarism," *Lapham's Quarterly* 9(2) (Spring 2016); Gray, "ISIS: an apocalyptic cult,"; Hussein

- To project power in order to encourage recruitment?¹⁸⁷⁰
- To provoke a sectarian civil war that pushes Sunnis into a Faustian bargain with IS against Shi'a reprisals?¹⁸⁷¹
- Because they are 'sociopathic killers'¹⁸⁷² and/or sadists¹⁸⁷³?
- Out of nihilistic rage against the world?¹⁸⁷⁴
- To purify Islam by slaughtering its perceived corrupters?¹⁸⁷⁵
- Out of perceived divine command to commit genocide against the enemies of God?¹⁸⁷⁶
- Revenge of Iraqi Shi'a/Syrian regime predations?¹⁸⁷⁷
- In (alleged) emulation of the first Muslim community?¹⁸⁷⁸
- As a form of worship?¹⁸⁷⁹
- To hasten the apocalypse?¹⁸⁸⁰
- Because civil wars typically produce such violence?¹⁸⁸¹

Ibish, "The ISIS theatre of cruelty," *The New York Times*, dated February 18 2015. Accessed December 20 2019. Available at: <https://www.nytimes.com/2015/02/19/opinion/the-isis-theater-of-cruelty.html?searchResultPosition=139>; Shiraz Maher, "Inside the minds of ISIS murderers," *New Statesman*, dated May 28 2017. Accessed December 22 2019. Available at: <https://www.newstatesman.com/world/2017/05/inside-minds-isis-murderers>; Manne, "The mind of the Islamic State".

¹⁸⁷⁰ Cronin, "ISIS Is Not a Terrorist Group," 94; Kalyvas, "The logic of violence in the Islamic State's War," 34; Robert A. Pape, et al., "Why ISIL beheads its victims," *Politico*, dated October 7 2014. Accessed December 29 2019. Available at: <https://www.politico.com/magazine/story/2014/10/why-isil-beheads-its-victims-111684>

¹⁸⁷¹ Aaron Y. Zelin, "The Massacre Strategy," *Politico*, dated June 17 2014. Accessed December 29 2019. Available at: <https://www.politico.com/magazine/story/2014/06/the-massacre-strategy-107954>; Manne, "The mind of the Islamic State".

¹⁸⁷² Tyrrell, "From Magdeburg to Mosul"; "How to fight ISIS".

¹⁸⁷³ Fisher, "The real ideology driving ISIS"; "The fundamental horror of ISIS".

¹⁸⁷⁴ Roy, "Who are the new jihadis?"; Malik, "Radical Islam, nihilist rage,"; Rampoldi, "God is Dead".

¹⁸⁷⁵ Packer, "Why ISIS murdered Kenji Goto,"; Wood, "What ISIS really wants,"; Atran and Hamid, "Paris: The War ISIS wants".

¹⁸⁷⁶ Roger Cohen, "Here there is no why," *The New York Times*, dated September 29 2014. Accessed December 19 2019. Available at: <https://www.nytimes.com/2014/09/30/opinion/roger-cohen-for-isis-slaughter-is-an-end-in-itself.html?searchResultPosition=253>; Crowley, "The End of Iraq"; Fisher, "Why is there Sunni Arab support for ISIS"; Tom Holland, "The West can never hope to understand Islamic State," *New Statesman*, dated January 21 2017. Accessed December 28 2019. Available at: <https://www.newstatesman.com/culture/books/2017/01/west-can-never-hope-understand-islamic-state>; Zelin, "The Massacre Strategy,"; Sethu A. Iyer, "Islamic Terrorists aren't nihilists, they're firm believers in evil," *The Federalist*, dated June 28 2017. Accessed January 9 2020. Available at: <https://thefederalist.com/2017/06/28/islamic-terrorists-arent-nihilists-theyre-firm-believers-evil/>

¹⁸⁷⁷ Zelin, "The Massacre Strategy."

¹⁸⁷⁸ Holland, "We must not deny the religious roots"; Wood, "What ISIS really wants".

¹⁸⁷⁹ Nance, "Five ways to devastate ISIL".

¹⁸⁸⁰ Shiraz Maher, "Why ISIS seeks a battle with Western nations – and why it can't be ignored," *New Statesman*, dated November 22 2015. Accessed December 22 2019. Available at: <https://www.newstatesman.com/world/middle-east/2015/11/why-isis-seeks-battle-western-nations-and-why-it-can-t-be-ignored>

¹⁸⁸¹ Kalyvas, "The logic of violence in the Islamic State's War," 35.

9.3. On where IS came from/why IS emerged:

- Colonial divide-and-rule/remapping of the post-Ottoman Empire?¹⁸⁸² (or not?¹⁸⁸³)
- Due to a premature end to colonialism?¹⁸⁸⁴
- Due to the oppressions and incompetence of post-colonial Arab regimes?¹⁸⁸⁵
- Due to the incompetence and predations of the post-Saddam Iraqi government?¹⁸⁸⁶
- Due to a crisis in mainstream Sunni leadership?¹⁸⁸⁷
- Saudi exporting of Wahhabism?¹⁸⁸⁸
- Saddam Hussein's 1990s 'Faith Campaign'?¹⁸⁸⁹

¹⁸⁸² McMillan, *From the First World War*, 65; Sakai, "ISIS and Sectarianism"; Mather, "The Fall of the Ottoman Empire"; Masoom, "A Colonial Catalyst"; Nasser, "A Crisis a Century in the Making"; "Sykes-Picot and its aftermath"; Wright, "How the Curse of Sykes-Picot"; Hughes, "The Sykes-Picot Agreement"; Sachs, "The Middle East"; Renton, "The post-colonial caliphate"; and Bassil, "Islamic State knows its history".

¹⁸⁸³ Louise Fawcett, "States and sovereignty in the Middle East: myths and realities," *International Affairs* 93(4) (2017): pp. 789–807; Sara Pursley, "'Lines Drawn on an Empty Map': Iraq's Borders and the Legend of the Artificial State (Part 1)," *Jadaliyya*, June 2 2015. Accessed June 24 2018. Available at: <https://www.jadaliyya.com/Details/32140>; Dodge, "The Danger of Analogical Myths"; Steven A. Cook, and Amr T. Leheta, "Don't Blame Sykes-Picot for the Middle East's Mess," *Foreign Policy*, dated May 13 2016. Accessed May 30 2018. Available at: <https://foreignpolicy.com/2016/05/13/sykes-picot-isnt-whats-wrong-with-the-modern-middle-east-100-years/>; Khalaf, "Colonial powers did not set the Middle East ablaze,"; Asli Bâli, "Sykes-Picot and 'Artificial' States," *AJIL Unbound* 110 (2016): pp. 115-119; Daniel Neep, "Focus: the Middle East, Hallucination, and the Cartographic Imagination," *Discover Society*, dated January 3 2015. Accessed June 27 2018. Available at: <https://discoversociety.org/2015/01/03/focus-the-middle-east-hallucination-and-the-cartographic-imagination/>; David Siddhartha Patel, "Repartitioning the Sykes-Picot Middle East? Debunking Three Myths," *Brandeis University Middle East Brief* 103 (Nov., 2016); Gelvin, "Obsession with Sykes-Picot".

¹⁸⁸⁴ Kaplan, "Why the Middle East is still a mess."

¹⁸⁸⁵ William Zartman, "States, boundaries and sovereignty in the Middle East: unsteady but unchanging," *International Affairs* 93(4) (2017), 934; Khalaf, "Colonial powers did not set the Middle East ablaze."

¹⁸⁸⁶ Shaver and Tenorio, "Want to defeat ISIS in Iraq?", 20-21; Cordesman, *After ISIS*, 7; Fred Kaplan, "Obama's Quagmire: America's campaign against ISIS has already lost its way," *Slate*, dated October 31 2014. Accessed October 22 2020. Available at: <https://slate.com/news-and-politics/2014/10/president-obamas-campaign-against-isis-lacks-a-strategy-the-united-states-is-being-pulled-deeper-into-a-deadly-crisis.html>; Robert A. Pape, et al., "Hammer and Anvil," *Foreign Affairs*, dated January 2 2015. Accessed December 29 2019. Available at: <https://www.foreignaffairs.com/articles/iraq/2015-01-02/hammer-and-anvil>; al-Nidawi, "How Maliki lost Iraq".

¹⁸⁸⁷ Sinan Adnan and Aaron Reese, *Beyond the Islamic State: Iraq's Sunni insurgency* (Washington, DC: Institute for the Study of War, 2014), 4.

¹⁸⁸⁸ Clapper, "Wahhabism"; Abboud, "The only way to take on ISIS"; Williams, "The Saudi Arabia problem"; Taleb, "The Saudi Wahhabis"; Husain, "Saudis must stop"; Friedman, "Our radical Islamist BFF"; Butt, "How Saudi Wahhabism Is the Fountainhead"; Armstrong, "Wahhabism to ISIS".

¹⁸⁸⁹ Orton, "How Saddam Hussein gave us ISIS,"; Sly, "How Saddam Hussein's former military officers and spies are controlling ISIS,"; Perry, "Fighting Saddam".

- Saddam Hussein's fomenting of ethnic and sectarian hatreds?¹⁸⁹⁰
- Due to the failure of modernity to live up to its lofty promises?¹⁸⁹¹
- As a result of a Saudi-Iranian proxy war?¹⁸⁹²
- As a result of the 2003 Iraq war?¹⁸⁹³
- Due to the toppling of dictatorial regimes?¹⁸⁹⁴
- Due to the region's post-Arab spring civil wars?¹⁸⁹⁵
- Due to Assad's brutality?¹⁸⁹⁶
- Due to Obama's failure to depose Assad?¹⁸⁹⁷
- Due to the collapse of the Syrian 'moderates'?¹⁸⁹⁸

9.4. On what IS wants:

- To abolish the colonial-imposed, Westphalian order?¹⁸⁹⁹

¹⁸⁹⁰ Amatzia Baram, "Saddam's ISIS," *Foreign Affairs*, dated April 8 2016. Accessed December 29 2019. Available at: <https://www.foreignaffairs.com/articles/iraq/2016-04-08/saddams-isis>

¹⁸⁹¹ Muqtedar Khan, "This is what happens when modernity fails all of us," *The New York Times*, dated December 6 2015. Accessed December 22 2019. Available at: <https://www.nytimes.com/roomfordebate/2015/12/06/how-can-america-counter-the-appeal-of-isis/this-is-what-happens-when-modernity-fails-all-of-us>; Mishra, "How to think about Islamic State."

¹⁸⁹² Maha Yahya, "Viewpoint: How to defeat Islamic State," *Carnegie Endowment for International Peace*, dated December 1 2015. Accessed December 11 2019. Available at: https://carnegie-mec.org/2015/12/01/multi-faceted-approach-focusing-on-underlying-causes/imlt?mkt_tok=3RkMMJWWfF9wsRouvqzPZKXonjHpfsX67%2B4kW6Gg38431UFwdcjK Pmjr1YsDRMt0aPyQAgobGp5I5FEIQ7XYTLB2t60MWA%3D%3D

¹⁸⁹³ Hasan and Sayedahmed, "Blowback"; Chulov, "Tony Blair"; Chulov, "ISIS: the inside story"; Abdulrazaq, "Invasion of Iraq"; Gray, "ISIS: an apocalyptic cult"; Kaplan, "ISIS and the logic of anarchy"; Manne, "The mind of the Islamic State"; Maher, "Syria's war without end"; Thompson and Suri, "How America helped ISIS"; Norton-Taylor, "A Thirty Years War"; Thompson, "How disbanding the Iraqi Army fuelled ISIS".

¹⁸⁹⁴ Thompson, "Fighting in Iraq and Afghanistan"; Ignatius, "How ISIS spread in the Middle East."; Alan Cowell, "Time before Iraq invasion holds lessons for fight against ISIS," *The New York Times*, dated November 26 2015. Accessed December 22 2019. Available at: <https://www.nytimes.com/2015/11/27/world/europe/time-before-iraq-invasion-holds-lessons-for-fight-against-isis.html?searchResultPosition=131>

¹⁸⁹⁵ Barbara F. Walter, "The Jihadist threat won't end with ISIS' defeat," *Foreign Affairs*, dated December 22 2017. Accessed December 30 2019. Available at: <https://www.foreignaffairs.com/articles/middle-east/2017-12-22/jihadist-threat-wont-end-isis-defeat>

¹⁸⁹⁶ Frederic C. Hof, "A Syria-first strategy for defeating ISIS," *The Atlantic*, dated November 5 2015. Accessed December 20 2019. Available at: <https://www.theatlantic.com/international/archive/2015/11/syria-strategy-defeat-isis/414295/>

¹⁸⁹⁷ Muhammad Idrees Ahmad, "Barack Obama's presidency will be defined by his failure to face down Assad," *Guardian*, dated December 17 2016. Accessed December 8 2019. Available at: <https://www.theguardian.com/world/2016/dec/17/obama-presidency-defined-failure-face-down-assad-syria>; Roger Cohen, "The making of a disaster," *The New York Times*, dated August 25 2014. Accessed December 20 2019. Available at: <https://www.nytimes.com/2014/08/26/opinion/roger-cohen-the-making-of-a-disaster.html?searchResultPosition=291>

¹⁸⁹⁸ Ignatius, "How ISIS spread in the Middle East."

¹⁸⁹⁹ Ignatius, "How ISIS spread"; Zelin, "Colonial Caliphate".

- To usher in the apocalypse?¹⁹⁰⁰
- To destroy and kill for its own sake?¹⁹⁰¹

9.5. On IS' appeal:

- Its military prowess?¹⁹⁰²
- Its administrative efficiency and anti-corruption?¹⁹⁰³
- Its ethos on justice and morality?¹⁹⁰⁴
- A Faustian bargain of protection against regime predations?¹⁹⁰⁵
- Fear of IS coercion?¹⁹⁰⁶
- Its perceived religious authority?¹⁹⁰⁷
- A chance to live under an 'authentic' Islamic system?¹⁹⁰⁸
- Its emotive notion of restoring the Caliphate?¹⁹⁰⁹
- Its powerful religious message of jihad?¹⁹¹⁰

¹⁹⁰⁰ Maher, "Why ISIS seeks a battle"; Beauchamp, "ISIS's dead-serious obsession"; Hughes, "If Islamic State is based on religion"; Gray, "ISIS: an apocalyptic cult"; Nance, "Five ways to devastate ISIL".

¹⁹⁰¹ Cohen, "Here there is no why"; Crowley, "The End of Iraq"; Fisher, "Why is there Sunni Arab support for ISIS"; Holland, "The West can never hope to understand"; Iyer, "Islamic Terrorists aren't nihilists, they're firm believers in evil".

¹⁹⁰² Chugg, "Winning the strategic communications war,"; Watts, "Countering ISIL's Ideology," 2; Dhanaraj, "Evolution of the Islamic State," 3; Bouziss, "Countering the Islamic State," 891; Farwell. "The Media Strategy of ISIS," 50; Droogan and Peattie, "Mapping the thematic landscape," 617; Matthew Levitt, "How to beat ISIL without 50,000 troops," *Washington Institute for Near East Policy*, dated November 18 2015. Accessed December 11 2019. Available at: <https://www.washingtoninstitute.org/policy-analysis/view/how-to-beat-isil-without-50000-troops>; Barbara F. Walter, "Why moderates support extreme groups," *Foreign Affairs*, dated June 18 2018. Available at: <https://www.foreignaffairs.com/articles/2018-06-18/why-moderates-support-extreme-groups>

¹⁹⁰³ Kaplan, "ISIS and the logic of anarchy,"; Shaver and Tenorio, "Want to defeat ISIS in Iraq?" 20; Walter, "Why moderates support extreme groups".

¹⁹⁰⁴ Walter, "The Jihadist threat won't end".

¹⁹⁰⁵ Itani, "Defeating the Jihadists," 6; Lister, "A long way from success"; Sommerville, "Into the terror zone"; Jonathan Powell, "Bombing ISIS is not enough – we'll need to talk to them too," *The Guardian*, dated December 1 2015. Accessed December 22 2019. Available at: <https://www.theguardian.com/commentisfree/2015/dec/01/talk-to-isis-jihadis-ira-negotiate-military-political-solution>; al-Essawi and al-Nujaifi, "Let Sunnis defeat Iraq's militants"; John R. Bolton, "To defeat ISIS, create a Sunni State," *The New York Times*, November 24 2015. Accessed December 22 2019. Available at: <https://www.nytimes.com/2015/11/25/opinion/john-bolton-to-defeat-isis-create-a-sunni-state.html?searchResultPosition=164>; Walter, "Why moderates support extreme groups,"; Zimmerman, "The never-ending War on Terror".

¹⁹⁰⁶ Haid Haid, *Reintegrating ISIS Supporters in Syria: Efforts, Priorities and Challenges* (London: International Centre for the Study of Radicalisation, 2018), 12.

¹⁹⁰⁷ Sorenson, "Confronting the 'Islamic State'," 25-26, 34-35; Iyer, "Islamic Terrorists aren't nihilists, they're firm believers in evil".

¹⁹⁰⁸ Stern, "The Islamic State Paradox."

¹⁹⁰⁹ Shadi Hamid, "The roots of the Islamic State's appeal," *The Atlantic*, dated October 31 2014. Accessed December 20 2019. Available at: https://www.theatlantic.com/international/archive/2014/10/the-roots-of-the-islamic-states-appeal/382175/?single_page=true

¹⁹¹⁰ Ignatius, "How ISIS spread in the Middle East."

- The simplistic clarity of its version of Islamic law?¹⁹¹¹
- Its opposition to Western policies?¹⁹¹²
- Its ‘cool factor’?¹⁹¹³
- Its apocalyptic romance?
- The opportunities it offers for:
 - Sadistic violence?¹⁹¹⁴
 - Nihilistic violence?¹⁹¹⁵ (or not?¹⁹¹⁶)
 - Community/belonging?¹⁹¹⁷
 - Self-actualisation (meaning, purpose, self-esteem, identity, etc)?¹⁹¹⁸
 - Material and financial elevation?¹⁹¹⁹
 - Sexual gratification?¹⁹²⁰
 - Revenge against society?¹⁹²¹
 - Redemptive violence?¹⁹²²
 - ‘cosplay’ escapism?¹⁹²³
 - Transcendence?¹⁹²⁴

¹⁹¹¹ Fisher, “Why is there Sunni Arab support for ISIS in Iraq?”.

¹⁹¹² Bell, “ISIS and violent extremism”.

¹⁹¹³ Owen, “Comms helped defeat Isis”; Barbara Franz, “Pop-jihadism: Why Young European Muslims are joining the Islamic State,” *Mediterranean Quarterly* 26(2) (2015), 6 & 20; Chassman, “Islamic State,” 238.

¹⁹¹⁴ See footnote 2056 above.

¹⁹¹⁵ See footnote 2057 above.

¹⁹¹⁶ Atran, “ISIS: The durability of chaos,”; Iyer, “Islamic Terrorists aren’t nihilists”.

¹⁹¹⁷ Dhanaraj, “Evolution of the Islamic State,” 1; Droogan and Peattie, “Mapping,” 617; Chassman, “Islamic State,” 209.

¹⁹¹⁸ Tolis, “Investigating the influence,” 141; Cronin, “ISIS Is Not a Terrorist Group,” 94; Magid, “How to Beat ISIS”.

¹⁹¹⁹ Tolis, “Investigating the influence of ISIS radicalisation,” 141; Haid, *Reintegrating ISIS Supporters*, 11.

¹⁹²⁰ Townsend, “Rape and slavery was lure”; Dearden, “Isis among terrorist groups using slaves”; Kale, “How terrorist groups like ISIS use sexual violence”; Hilburn, “IS militants use sex to lure recruits”; Engel, “ISIS is recruiting in the most perverse way imaginable”.

¹⁹²¹ Atran, “ISIS: The durability of chaos,”; Stern, “The Islamic State Paradox”.

¹⁹²² Atran, “ISIS: The durability of chaos.”

¹⁹²³ Benjamin Dueholm, “Return of the king,” *Aeon*, dated June 30 2015. Accessed December 10 2019. Available at: <https://aeon.co/essays/the-appeal-of-isis-isn-t-so-far-from-that-of-tolkien>

¹⁹²⁴ Scott Atran, “Jihad’s Fatal Attraction,” *The Guardian*, dated September 4 2014. Accessed December 11 2019. Available at: <https://www.theguardian.com/commentisfree/2014/sep/04/jihad-fatal-attraction-challenge-democracies-isis-barbarism>; Atran, “ISIS: The durability of chaos,”; Dueholm, “Return of the king,”; Wood, “What ISIS really wants,”; Ross Douthat, “The joy of ISIS,” *The New York Times*, dated November 23 2015. Accessed December 22 2019. Available at: <https://douthat.blogs.nytimes.com/2015/11/23/the-joy-of-isis/?searchResultPosition=87>; Mishra, “How to think about Islamic State.”

9.6. On how to defeat IS:

- Ideology-centric approaches:
 - Promote non-violent interpretations of Islam? (or not?¹⁹²⁵):
 - Sufism?¹⁹²⁶
 - Traditional Islam?¹⁹²⁷ (or not?¹⁹²⁸)
 - New interpretations of Islam?
 - Pluralist interpretations of Islam?¹⁹²⁹
 - Ecumenical interpretations of Islam?¹⁹³⁰
 - Quietist Salafism?¹⁹³¹
 - Pressure Saudi Arabia to refute IS' version of Wahhabism?¹⁹³²
 - Stop Saudi Arabia from exporting Wahhabism?¹⁹³³
 - Pressure 'moderate' Muslims to denounce and refute IS' interpretation of Islam?¹⁹³⁴
 - Deny IS' religious credentials?¹⁹³⁵

¹⁹²⁵ Because either 1) 'moderate' Islam/'moderate' Muslims are not deemed as credible by 'extremists' (Hemmingsen & Castro, *The trouble with counter-narratives*, 29; Jeffrey and Eisenstadt, *U.S. Military Engagement*, 199); or 2) because the appeal of IS lies specifically in its 'extremism' and violence, so a 'moderate', tamer version of Islam will be of no appeal to IS supporters (Watts, "Countering ISIL's Ideology," 2; Gemmerli, "Normalisation campaigns," 2).

¹⁹²⁶ Rizvi, "Could Sufi Islam be the cure-all?"; Asim, "Is Sufism the Antidote to Extremism?"; and Moubayed, "Damascene Sufism".

¹⁹²⁷ Bin Ali, "Countering ISIS Ideological Threat".

¹⁹²⁸ Because traditional Islam is – allegedly – part of the problem. See: Ali, "A problem from heaven," 40-43; Wood, "What ISIS really wants,"; Abdullahi Ahmed an-Na'im, "How Islamic law can take on ISIS," *The Conversation*, dated November 16 2015. Accessed December 22 2019. Available at: <https://theconversation.com/how-islamic-law-can-take-on-isis-50113>; Rabih Dandachli, "Fighting ideology with ideology: Islamism and the challenge of ISIS," *Brookings*, dated January 5 2017. Accessed December 22 2019. Available at: <https://www.brookings.edu/opinions/fighting-ideology-with-ideology-islamism-and-the-challenge-of-isis/>

¹⁹²⁹ Maajid Nawaz, "How to Beat ISIS: Reform Islamic Teaching," *The New York Times*, dated November 17 2015. Accessed December 29 2019. Available at: <https://www.nytimes.com/2015/11/18/world/middleeast/how-to-beat-isis-reform-islamic-teaching.html?searchResultPosition=5>; Patel, "Encourage and Support a 'Big Tent Citizen' Islam".

¹⁹³⁰ David Brooks, "Finding peace within the Holy texts," *The Washington Times*, dated November 17 2015. Accessed December 20 2019. Available at: <https://www.nytimes.com/2015/11/17/opinion/finding-peace-within-the-holy-texts.html?searchResultPosition=69>

¹⁹³¹ Taylor, "Don't Fear (All) Salafi Muslims"; Wood, "What ISIS really wants,"; McCants and Shaikh, "Experts weigh in (part 2)"; Sorenson, "Confronting the 'Islamic State'," 26.

¹⁹³² Posen, "Contain ISIS".

¹⁹³³ Abboud, "The only way to take on ISIS"; Sigal Samuel, "What it takes to make Saudi Islam 'Moderate'," *The Atlantic*, dated November 17 2017. Accessed December 19 2019. Available at: <https://www.theatlantic.com/international/archive/2017/11/moderate-islam-saudi-arabia/546017/>; Editorial, "How to fight ISIS,"; Husain, "Saudis must stop exporting extremism"; Butt, "How Saudi Wahhabism Is the Fountainhead".

¹⁹³⁴ Editorial, "How to fight ISIS,"; Nance, "Five ways to devastate ISIL."

¹⁹³⁵ Nance, "Five ways to devastate ISIL".

- Promote nationalism as an alternative to Islamism?¹⁹³⁶
- Refute IS' ideology on a point-by-point basis?¹⁹³⁷ (or not?¹⁹³⁸)
- Challenge IS' black-and-white narrative?¹⁹³⁹
- Highlight inconsistencies and false analogies in IS propaganda?¹⁹⁴⁰
- Movement-centric approaches:
 - Ridicule IS?¹⁹⁴¹ (or not?¹⁹⁴²)
 - Militarily crush Caliphate to discredit it?¹⁹⁴³ (or not?¹⁹⁴⁴)
 - Urge Sunni states to lead the fight against IS so as to deny the latter's religious credentials?¹⁹⁴⁵

¹⁹³⁶ Brooks, "The Nationalist Solution".

¹⁹³⁷ Schmid, *Challenging the Narrative*.

¹⁹³⁸ This would be futile as 'extremists' are inimical to reasoned debate/logical argumentation (Cronin, "ISIS Is Not a Terrorist Group," 94).

¹⁹³⁹ Beutel, et al., "Field Principles," 40.

¹⁹⁴⁰ Braddock & Horgan, "Towards a Guide," 389-390.

¹⁹⁴¹ So as to degrade its credibility and 'cool' image: Al-Rawi, "Anti-ISIS Humor"; Obeidallah, "Middle East Goes Monty Python"; McLaughlin, "The Case for Making Fun of ISIS".

¹⁹⁴² For such ridicule will only be automatically rejected, back IS supporters further into a defensive corner, and validate IS' narrative as a chosen few against a corrupt world: Hemmingsen & Møller, "Why counter-narratives are not the best"; Elizabeth Nicholas, "Can We Just Laugh Off ISIS?" *Vice News*, dated July 25 2015. Accessed December 10 2018. Available at: https://www.vice.com/en_ca/article/gqmijm/can-we-just-laugh-off-isis-235

¹⁹⁴³ Defeating the Caliphate militarily will crush IS claims to religious legitimacy/authority and discredit their claims of being divinely aided: Watts, "Countering ISIL's Ideology," 2; Levitt, "How to beat ISIL without 50,000 troops"; Ilan Goldenberg, et al., "Defeating the Islamic State: A Bottom-up approach," *Center for a New American Security*, dated June 16 2016. Accessed December 11 2019. Available at: <https://www.cnas.org/publications/reports/defeating-the-islamic-state-a-bottom-up-approach>; Wood, "What ISIS really wants"; William McCants, "State of Confusion," *Foreign Affairs*, dated September 10 2014. Accessed December 29 2019. Available at: <https://www.foreignaffairs.com/articles/syria/2014-09-10/state-confusion>

¹⁹⁴⁴ Militarily defeating IS' Caliphate will only burnish IS' credentials as the only true defenders of Islam, make martyrs of its fighters, and validate its claims that the West is waging a war against Islam: Atran and Hamid, "Paris: The War ISIS wants"; Sunny Hundal, "The US and the UK can't defeat ISIS – Arab states have to take the lead," *New Statesman*, dated August 12 2014. Accessed December 22 2019. Available at: <https://www.newstatesman.com/politics/2014/08/us-and-uk-can-t-defeat-isis-arab-states-have-take-lead>; Shiraz Maher, "US air strikes on Isis add fuel to extremist ideologies," *New Statesman*, dated September 25 2014. Accessed December 22 2019. Available at: <https://www.newstatesman.com/world-affairs/2014/09/us-air-strikes-isis-add-fuel-extremist-ideologies>; Robert Grenier, "Against ISIS, try patience," *The New York Times*, dated March 2 2015. Accessed December 22 2019. Available at: <https://www.nytimes.com/2015/03/03/opinion/against-isis-try-patience.html?searchResultPosition=192>; Walt, "ISIS as Revolutionary State,"; Barry R. Posen, "The case for doing nothing in Iraq," *Politico*, dated June 16 2014. Accessed December 29 2019. Available at: <https://www.politico.com/magazine/story/2014/06/the-case-for-doing-nothing-in-iraq-107913>; Stern, "The Islamic State Paradox".

¹⁹⁴⁵ An anti-IS coalition comprised of Sunni states will demonstrate IS does not represent Sunnis: Kaplan, "Obama's Quagmire"; Hundal, "The US and the UK can't defeat ISIS,"; J.M. Berger, "How to beat ISIS: Use Arab armies to fight the group," *The New York Times*, dated November 17 2015. Accessed December 29 2019. Available at: <https://www.nytimes.com/2015/11/18/world/middleeast/how-to-beat-isis-use-arab-armies-to-fight-the-group.html?searchResultPosition=7>

- Highlight IS' cruelty?¹⁹⁴⁶ (or not?¹⁹⁴⁷)
- Highlight IS' failures?¹⁹⁴⁸
- Highlight IS' say-do gap?¹⁹⁴⁹
- Publicise defector testimonies?¹⁹⁵⁰ (or not?¹⁹⁵¹)
- Support Sunni factions to break Faustian bargain
 - Sunni tribes?¹⁹⁵²
 - Rival Islamists?¹⁹⁵³
 - To fight both IS and Assad to burnish their revolutionary legitimacy?¹⁹⁵⁴
- Potential recruit-centric approaches:
 - Provide education to increase their resilience against IS propaganda?¹⁹⁵⁵
 - Highlight grim reality of life in IS?¹⁹⁵⁶
 - Promote positive alternative Muslim identities?¹⁹⁵⁷
 - Help vulnerable individuals find alternative means of fulfilment?¹⁹⁵⁸
- *Status quo*-centric approaches:

¹⁹⁴⁶ Watts, "Countering ISIL's Ideology," 2-3; Ajit Maan, "Narrative: The Critical Component of Counter-Terrorism Strategy," *Small Wars Journal*, undated. Accessed October 2 2019. Available at: <https://smallwarsjournal.com/jrnl/art/narrative-the-critical-component-of-counter-terrorism-strategy>; McCants, "State of Confusion".

¹⁹⁴⁷ IS cruelty and brutality is actually a major recruitment draw: Counter-Daesh Communications Cell Guest Blogger for FCO Editorial, "Counter Daesh Communications"; Sorenson, "Confronting the 'Islamic State'," 25.

¹⁹⁴⁸ Counter-Daesh Communications Cell Guest Blogger for FCO Editorial, "Counter Daesh Communications,"; Chugg, "Winning the strategic communications"; Owen, "Comms helped defeat Isis in Iraq".

¹⁹⁴⁹ Braddock & Horgan, "Towards a Guide," 389; Ingram, *A 'Linkage-Based' Approach*, 7; Walter, "Why moderates support extreme groups."

¹⁹⁵⁰ Levitt, "A Counterterrorism Restructuring"; Bouziss, "Countering the Islamic State," 890.

¹⁹⁵¹ For would such testimonies not simply be dismissed by IS supporters as traitors, malcontents or even foreign agents? (Jeffrey and Eisenstadt, *U.S. Military Engagement*, 199).

¹⁹⁵² Andrew J. Tabler, "Securing al-Sham," *Foreign Affairs*, dated June 25 2014. Accessed January 18 2020. Available at: https://www.foreignaffairs.com/articles/iraq/2014-06-25/securing-al-sham?fa_anthology=1113995; Kimberly Kagan, et al., *A Strategy to Defeat Islamic State* (Washington, DC: Institute for the Study of War, 2014), 4; Ilan Goldenberg, et al., "Defeating the Islamic State,"; Jean-Marie Guéhenno and Noah Bonsey, "To stop ISIS in Syria, support Aleppo," *The New York Times*, dated September 14 2014. Accessed December 22 2019. Available at: <https://www.nytimes.com/2014/09/15/opinion/to-stop-isis-in-syria-support-aleppo.html?searchResultPosition=153>; Pape, et al., "Hammer and Anvil".

¹⁹⁵³ Matthieu Aikins, "The promise of Aleppo's radicals," *The New York Times*, dated July 7 2014. Accessed December 22 2019. Available at: <https://www.nytimes.com/2014/07/08/opinion/the-promise-of-aleppos-radicals.html?searchResultPosition=240>

¹⁹⁵⁴ Hassan, "Iraq isn't the right front" .

¹⁹⁵⁵ Ghosh, et al., "Can education counter violent religious extremism?"; Byrne, "We need character education to fight the ISIS death cult".

¹⁹⁵⁶ Beutel, et al., "Field Principles," 40.

¹⁹⁵⁷ Ibid, 41; Magid, "How to Beat ISIS".

¹⁹⁵⁸ Franz, "Pop-jihadism," 6 & 20.

- Humanise the stated enemies of IS?¹⁹⁵⁹
- Empower ‘moderate’ Islamists to legitimate the Westphalian order?¹⁹⁶⁰
- Root-cause-centric approaches¹⁹⁶¹:
 - Promote inclusive governance?¹⁹⁶²
 - Promote local, decentralised government and security provision?¹⁹⁶³
 - Promote competent government and service provision?¹⁹⁶⁴
 - Politically settle the region’s civil wars?¹⁹⁶⁵
 - Through sectarian power-sharing agreements that offer a peace-dividend to ‘moderate’ factions?¹⁹⁶⁶
 - Disarm Shi’a militias?¹⁹⁶⁷
 - Contain Iranian regional adventurism?¹⁹⁶⁸
 - Protect civilians from Assad regime predations?¹⁹⁶⁹
 - Depose Assad?¹⁹⁷⁰ (or not?¹⁹⁷¹)
 - Promote economic hope?¹⁹⁷²

¹⁹⁵⁹ Braddock & Horgan, “Towards a Guide,” 391.

¹⁹⁶⁰ Hamid, “The roots”.

¹⁹⁶¹ Hassan Hassan, “ISIS Is Poised to Make a Comeback in Syria,” *The Atlantic*, dated September 18 2018. Accessed January 19 2020. Available at: <https://www.theatlantic.com/ideas/archive/2018/09/isis-is-poised-to-make-a-comeback-in-syria/569986/>; Joyner, “Whack-a-Mole,”; Lister, “A long way from success,”; Powell, “Bombing ISIS is not enough,”; Walter, “Why moderates support extreme groups,”; Zimmerman, “The never-ending War on Terror”; Alpher, “Why defeating ISIS with military might is starry eyed idealism.”

¹⁹⁶² Lister, “A long way from success,”; Kagan, et al., *A Strategy to Defeat Islamic State*, 4; Goldenberg, et al., “Defeating the Islamic State,”; Hamid, “The roots”; Adnan and Reese, *Beyond the Islamic State*, 4.

¹⁹⁶³ Denise Natali, “Stabilizing Iraq with and without the Islamic State,” *War on the Rocks*, dated November 16 2016. Accessed January 11 2020. Available at: <https://warontherocks.com/2016/11/stabilizing-iraq-with-and-without-the-islamic-state/>; Mansour and al-Douri, *Rebuilding the Iraqi State*, 6; Lister, “A long way from success,”; Goldenberg, et al., “Defeating the Islamic State,”; Ignatius, “How ISIS spread in the Middle East,”; al-Essawi and al-Nujaifi, “Let Sunnis defeat Iraq’s militants”.

¹⁹⁶⁴ Mansour and al-Douri, *Rebuilding the Iraqi State*, 6; Shaver and Tenorio, “Want to defeat ISIS in Iraq?” 20; Jessica D. Lewis, *The Islamic State: a counter-strategy for a counter-state* (Washington, DC: Institute for the Study of War, 2014), 5.

¹⁹⁶⁵ Walter, “Why moderates support extreme groups,”; Hassan, “ISIS Is Poised”.

¹⁹⁶⁶ Ibid, Pape, et al., “Hammer and Anvil”.

¹⁹⁶⁷ al-Essawi and al-Nujaifi, “Let Sunnis defeat Iraq’s militants.”

¹⁹⁶⁸ Engel, “The crippling contradiction”; Kagan, et al., *A Strategy to Defeat Islamic State*, 4.

¹⁹⁶⁹ Hof, “A Syria-first strategy for defeating ISIS”.

¹⁹⁷⁰ Lister, “A long way from success,”; Yahya, “Viewpoint”; Ignatius, “How ISIS spread in the Middle East,”; Hof, “A Syria-first strategy for defeating ISIS,”; Editorial, “How to fight ISIS”.

¹⁹⁷¹ Julien Barnes-Dacey and Daniel Levy, “To beat ISIS, focus on Syria,” *The New York Times*, dated September 1 2014. Accessed December 29 2019. Available at: <https://www.nytimes.com/2014/09/02/opinion/to-beat-isis-focus-on-syria.html?searchResultPosition=1>

¹⁹⁷² Cordesman, *After ISIS: Creating Strategic Stability in Iraq*, 7.

- Promote sectarian reconciliation?¹⁹⁷³
- Create Sunni Arab autonomous regions or states?¹⁹⁷⁴
- Kinetic approaches:
 - Militarily defeat through Western boots on the ground?¹⁹⁷⁵ (or not?¹⁹⁷⁶)
- Minimalist approaches:
 - Contain IS and allow it to collapse under its own weakness and frictions?¹⁹⁷⁷
- Diplomatic approaches:
 - Negotiate with IS?¹⁹⁷⁸
- Abstract approaches based on religious analogy:
 - An 'Islamic Treaty of Westphalia'?¹⁹⁷⁹
 - An 'Islamic Reformation'?¹⁹⁸⁰ (or not?¹⁹⁸¹)
 - An 'Islamic Restoration'?¹⁹⁸²
 - An 'Islamic Enlightenment'?¹⁹⁸³
 - A Iraqi-Syrian 'Ta'if agreement'?¹⁹⁸⁴

¹⁹⁷³ Mansour and al-Douri, *Rebuilding the Iraqi State*, 13; Jonas Parello-Plesner, "Post-ISIS Challenges for Stabilization: Iraq, Syria and the U.S. Approach," *Hudson Institute* (Aug., 2018), 7.

¹⁹⁷⁴ Lieven, "The key to crushing ISIS"; Bolton, "To defeat ISIS"; Barak Mendelsohn, "Divide and Conquer in Syria and Iraq," *Foreign Affairs*, dated November 29 2015. Accessed December 29 2019. Available at: <https://www.foreignaffairs.com/articles/turkey/2015-11-29/divide-and-conquer-syria-and-iraq>

¹⁹⁷⁵ James Jeffrey, "Leave root causes aside – destroy the ISIS 'State'," *The Atlantic*, dated April 29 2016. Accessed December 20 2019. Available at: <https://www.theatlantic.com/international/archive/2016/04/destroy-isis-as-state/480531/>; Bremmer, "Obama's big talk"; Richard A. Epstein, "Obama's ISIS paralysis," *Hoover Institution*, dated November 23 2015. Accessed October 22 2020. Available at: <https://www.hoover.org/research/obamas-isis-paralysis>

¹⁹⁷⁶ The last time foreign troops occupied Iraq gave birth to IS' predecessor: Posen, "Contain ISIS".

¹⁹⁷⁷ Berman and Shapiro, "Why ISIL will fail on its own"; Stephen Biddle and Jacob Shapiro, "America can't do much about ISIS," *The Atlantic*, dated April 20 2016. Accessed December 20 2019. Available at: <https://www.theatlantic.com/international/archive/2016/04/isis-containment-civil-war/478725/>; Posen, "Contain ISIS,"; Wood, "What ISIS really wants,"; Cronin, "ISIS Is Not a Terrorist Group," 88; Walt, "ISIS as Revolutionary State".

¹⁹⁷⁸ Powell, "Bombing ISIS is not enough."

¹⁹⁷⁹ Tyrrell, "From Magdeburg to Mosul".

¹⁹⁸⁰ Ali, "A problem from heaven."

¹⁹⁸¹ Because IS is the Islamic Reformation. See footnote 2050 above.

¹⁹⁸² Abdullah al-Andalusi, "Islam needs a restoration, not a reformation," *Middle East Eye*, dated April 7 2017. Accessed December 15 2019. Available at: <https://www.middleeasteye.net/big-story/islam-needs-restoration-not-reformation>

¹⁹⁸³ Akyol, "The Islamic World doesn't need a Reformation".

¹⁹⁸⁴ A sectarian power-sharing agreement based on that used to end the 1975-1990 *Lebanese civil war*. Ignatius, "How ISIS spread in the Middle East".

Appendix B: Factors in ideological competitions: empirical evidence

10.

This appendix provides empirical evidence substantiating our identification of the interacting variables and processes involved in promoting/constraining ideological-popularisation during ideological competitions. Each ideological competition is presented in turn, chronologically:

10.1. Ideological competition 1: Ottoman collapse and colonial rule (c. 1918-1930s):

10.1.1. Facilitating factors:

- *Relevant diagnostic frames:*

Pan-Arab Nationalism:	Marxism:	Pan-Islamism:
<ul style="list-style-type: none"> • Pan-Arab Nationalism helped provide a locus of solidarity that could clearly differentiate indigenous friends from foreign enemies. • However, as noted below, it rested on an alien and maligned identity, while the Muslim identity of the Pan-Islamist movement was far more accessible and compelling for a 	<ul style="list-style-type: none"> • Marxism went some way towards providing a compelling ideological narrative in terms of its opposition to imperialism. • However, its specific class frames and narratives were accessible only to Lebanon's miniscule proletariat, being an alien form of solidarity for most of the region's menu people¹⁹⁸⁶. 	<ul style="list-style-type: none"> • Pan-Islamism provided a compelling and familiar locus of solidarity and ideological narrative to support revolt against encroaching, non-Muslim foreign powers. This was particularly the case when late-Ottoman pan-Islamic discourses had encouraged the Empire's Muslim menu people to consider themselves

¹⁹⁸⁶ See next section.

community still feeling solidarity with their Turkish Muslim brethren ¹⁹⁸⁵ .		residents of the Muslim world, in contradistinction to a distinctly 'Christian' Western world ¹⁹⁸⁷ .
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- *Elite support (sincere or rhetorical), or credible means of subverting elite influence:*

Pan-Arab Nationalism:	Marxism:	Pan-Islamism:
<ul style="list-style-type: none"> • Pan-Arab Nationalism was adopted as the official ideology of the Lebanese and Syrian Sunni zu'ama'¹⁹⁸⁸. • Their advocacy of Pan-Arab Nationalism was muddled, however, by the diffuseness of their rhetoric, which often appealed to Islamic discursive tropes such as 	<ul style="list-style-type: none"> • The CPSL did not enjoy the support of any traditional elites, nor did it possess the means or resources necessary to subvert them. 	<ul style="list-style-type: none"> • As noted¹⁹⁹¹, much elite discourse drew on Pan-Islamic discourses, thereby offering credence and platform to pan-Islamist ideas. • However, the project of those elites remained a decidedly Pan-Arab/Pan-Syrian one¹⁹⁹².

¹⁹⁸⁵ Indeed, many rebel leaders were calling for the reconstitution of the Ottoman Empire – see: Lawson, “The northern Syrian Revolts,” 258-269; Provence, *The Last Ottoman Generation*, 134.

¹⁹⁸⁷ Kanaan, *Lebanon*, 29.

¹⁹⁸⁸ As noted above. Helpful references include: Nadine Méouchy, “Rural resistance and the introduction of modern forms of consciousness in the Syrian countryside, 1918-1926,” in *From the Syrian Land to the States of Syria and Lebanon*, eds. Thomas Phillip and Christoph Schumann, (Beirut: Ergon Verlag Würzburg in Kommission, 2004), 284; Aboultaif, *Power Sharing*, 61; Kanaan, *Lebanon*, 203.

¹⁹⁹¹ See footnotes 2172 and 2173.

¹⁹⁹² As noted above. See Zamir, *Lebanon's Quest*, for a detailed exploration of Sunni-Lebanese elite politics during this period.

jihad ¹⁹⁸⁹ or defence of Muslim lands ¹⁹⁹⁰ .		
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- *Strong leadership:*

Pan-Arab Nationalism:	Marxism:	Pan-Islamism:
<ul style="list-style-type: none"> • As noted, the traditional elites officially adopted Pan-Arab Nationalism as their ideological programme, despite the ambiguity of much of their discourse. • Despite this, the movement lacked unifying leadership following the defeat of Emir Faysal in 1920. Thus Pan-Arab Nationalism constituted more of a diffuse movement led by isolated local elites and communal leaders than a 	<ul style="list-style-type: none"> • The CPSL had more unified leadership, but it was constituted of obscure individuals with unknown credentials, few of whom were Sunni, Muslim, or Arab¹⁹⁹⁴. • Moreover, that leadership was almost immediately decapitated by the French authorities upon their entry into the ideological competition¹⁹⁹⁵. 	<ul style="list-style-type: none"> • Like the Pan-Arab Nationalist movement, the Pan-Islamist movement lacked unifying leadership. Moreover, it was generally eschewed by the political elite, being championed chiefly by former Ottoman military cadres¹⁹⁹⁶. While this may have given them an edge militarily, it gave them a weaker organic link with the menu people they were trying to mobilise.

¹⁹⁸⁹ Méouchy, "Rural resistance," 286.

¹⁹⁹⁰ Zamir, *Lebanon's Quest*, 4; Salibi, *A House of Many Mansions*, 50.

¹⁹⁹⁴ So problematic was this ethnic and religious disconnect that, in 1928, the Comintern directed the CPSL to 'Arabise' – see: Franzén, "Communism in the Arab World, 556. See also: Salem, *Bitter Legacy*, 150.

¹⁹⁹⁵ Suleiman, "The Lebanese Communist Party," 137; Ismael and Ismael, *The Communist Movement in Syria and Lebanon*, 14; Muñoz, "The Lebanese Communist Party," 95.

¹⁹⁹⁶ Provence, "Ottoman Modernity,"; Michael Provence, *The Last Ottoman Generation*, 107.

unified movement ¹⁹⁹³ .		
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- *Sufficient resources (access to arms, means of dissemination, organisation, etc.):*

Pan-Arab Nationalism:	Marxism:	Pan-Islamism:
<ul style="list-style-type: none"> • The Pan-Arab Nationalist movement probably had the best access to weaponry, means of dissemination, and organisation. Its elite leadership had greater influence in key urban areas and had organic, patrimonial links with the menu people it sought to mobilise. 	<ul style="list-style-type: none"> • The CPSL lacked weaponry, but might have been able to make up for that through the power of the mass strike, had its leadership survived its early decapitation. • Its only means of dissemination were its newspapers, which were both inaccessible to a largely illiterate population¹⁹⁹⁷ and, moreover, distributed propaganda that was overly intellectual, ill-suited to the local contexts, and 	<ul style="list-style-type: none"> • The Pan-Islamist movement benefited from the support of many former Ottoman military cadres, granting them access to stocks of weaponry and the knowledge in their use¹⁹⁹⁹. • However, they lacked the organic links with the menu people enjoyed by the Pan-Arab Nationalist elites, meaning they were outmatched in means of dissemination.

¹⁹⁹³ After refusing French demands to cede control of Syria, Emir Faysal and his followers were crushed in battle by the French forces. After this point, the anti-colonial movement was diffuse, being led in various locales by various military officers, urban elites and rural sheikhs. See: Lawson, "The northern Syrian Revolts"; Provence, "Ottoman Modernity"; Méouchy, "Rural resistance".

¹⁹⁹⁷ The CPSL and its predecessor, the *Lebanese People's Party* [LPP] had some success coordinating unions in this early stage. Indeed, 1926 – the year after the CPSL's decapitation – was dubbed the "year of strikes" due to the high level of labour activism, see: Khayat, "The Left," 26. See also: Suleiman, "The Lebanese Communist Party," 136;

¹⁹⁹⁹ See footnote 2179 above.

	<p>militantly atheistic¹⁹⁹⁸.</p>	
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- *Clear precedents for success (prognostic or strategic):*

Pan-Arab Nationalism:	Marxism:	Pan-Islamism:
<ul style="list-style-type: none"> • The Pan-Arab Nationalists could invoke multiple precedents for success in mobilising along nationalist lines, in pursuit of a nationalist project. However, such examples were not necessarily advantages. Many precedents concerned anti-Ottoman Christian revolts in the Balkans, which had stigmatised nationalism in the eyes of many Muslim Arabs (see below). Moreover, the reportedly most influential precedents – the Turkish resistance to colonial 	<ul style="list-style-type: none"> • The CPSL enthusiastically cited the success of the October 1917 Bolshevik Revolution in Russia as evidence of the vitality and emancipatory potential of Marxism²⁰⁰². 	<ul style="list-style-type: none"> • Pan-Islamists could cite no explicit precedents for success (although, as noted, could potentially cite the Turkish or Moroccan anti-colonial movements as examples of Muslim solidarity). However, they could invoke a deeper historical memory of Ottoman or Muslim vitality in the glory days of Empire.

¹⁹⁹⁸ Ismael, *The Communist Movement in the Arab World*, 2.

²⁰⁰² Muñoz, "The Lebanese Communist Party," 93; Baun, *Winning Lebanon*, 25; Salem, *Bitter Legacy*, 149; Hanssen, "Communism in the Middle East and North Africa," 199.

<p>occupation²⁰⁰⁰ and the 1920s Moroccan ‘Rif’ resistance²⁰⁰¹ against Spanish and French colonialism could just as easily been seen as reflecting the vitality of Muslim solidarity as much as nationalist solidarity.</p>		
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- *De-intellectualising personalities and events (charismatic leaders, martyrs, glamorous ‘poster-boys’, heroic episodes, etc.):*

Pan-Arab Nationalism:	Marxism:	Pan-Islamism:
<ul style="list-style-type: none"> • The Pan-Arab Nationalist movement could cite Emir Faysal and his followers as heroes and martyrs following their military defeat to France at the 1920 battle of Maysalun²⁰⁰³. • However, it is dubious how credible this would be to the menu people, given their cold and suspicious reception 	<ul style="list-style-type: none"> • The CPSL lacked such charismatic leaders, heroes, or martyrs. It is possible that it might have been able to cultivate them, had their leadership not been decapitated almost immediately. 	<ul style="list-style-type: none"> • As with Pan-Arab Nationalism, the Pan-Islamist movement could seek to lionise heroes and martyrs of the anti-colonial resistance. However, it was often open to debate just what ideological vision those personalities stood for. • The Pan-Islamist movement, like the Pan-Arab Nationalist

²⁰⁰⁰ Nafi, “The Arabs and Modern Turkey,” 68; Provence, *The Last Ottoman Generation*, 104-112.

²⁰⁰¹ Rogan, *The Arabs*, 282.

²⁰⁰³ Zamir asserts that “The battle of Maysalun was engraved on Syria’s collective memory as a symbol of the nation’s heroic defence of its independence” – see: Zamir, *Lebanon’s Quest*, 2.

<p>of Emir Faysal's anti-Ottoman Arab Revolt²⁰⁰⁴.</p> <ul style="list-style-type: none"> • The Pan-Arab Nationalist movement could cite a growing roster of heroes and martyrs as the anti-colonial resistance progressed, however it was often ambiguous whether these fighters stood for Pan-Arab Nationalism, Pan-Islamism, or more parochial or reactive impulses. Nevertheless, the massive outbreaks of anti-colonial resistance across Lebanon, Syria, and Iraq in the 1920s likely did encourage a solidarity based on identitarian commonalities – whether as Arabs or Muslims²⁰⁰⁵. 		<p>movement, lacked unifying, charismatic leaders to provide a face to the movement and its ideals.</p>
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²⁰⁰⁴ As noted above.

²⁰⁰⁵ Zamir assesses the revolts likely did much to raise the emotive appeal of Pan-Arab Nationalism – see: Zamir, *Lebanon's Quest*, 9.

<ul style="list-style-type: none"> Overall, as noted, the movement lacked unifying charismatic leaders to give a human face to the movement and its ideals. 		
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- Endorsement by communal actors with high social capital:*

Pan-Arab Nationalism:	Marxism:	Pan-Islamism:
<ul style="list-style-type: none"> The Pan-Arab Nationalist movement was championed both by traditional elites and many ‘ulema, who then applied an Islamic gloss to the ideological project in their populist exhortations to their congregations²⁰⁰⁶. 	<ul style="list-style-type: none"> Marxism did not receive any such endorsements. 	<ul style="list-style-type: none"> As noted, while individual elites and ‘ulema lent their support to the movement, no overarching charismatic or authoritative figures emerged to champion it.

10.1.2. Inhibiting factors:

- Ideological/movement market is ‘saturated’:*

Pan-Arab Nationalism:	Marxism:	Pan-Islamism:
<ul style="list-style-type: none"> The collapse of the Ottoman Empire – and substantial Arab resentment towards the Turkish authorities that preceded it – left the region with an ideological blank-slate into which ideologies/movements could step up and compete on relatively equal footing. However, Pan-Islamism likely had a slight edge as the most familiar ideology and locus of solidarity on offer. 		

- Ideology is too intellectual/abstract:*

²⁰⁰⁶ Rogan, *The Arabs*, 288; Johnson, *Class and Client*, 25.

Pan-Arab Nationalism:	Marxism:	Pan-Islamism:
<ul style="list-style-type: none"> • Pan-Arab Nationalist ideas were highly abstract and intellectual, lacking currency among the menu people at this stage²⁰⁰⁷. 	<ul style="list-style-type: none"> • Not only was Marxism highly abstract and intellectual, it also lacked relevance in the post-Ottoman setting, being as it was highly Western-centric and formulated in reflection of highly-industrialised societies alien to the Levant²⁰⁰⁸. 	<ul style="list-style-type: none"> • Pan-Islamism was more of a populist identity project than a detailed ideology, rendering it familiar and accessible to the menu people.

- *Ideology's concepts or mobilising identities are alien or suspect:*

Pan-Arab Nationalism:	Marxism:	Pan-Islamism:
<ul style="list-style-type: none"> • Arab Nationalism was doubly alien and stigmatised for the Sunni-Lebanese menu people: • Firstly, Nationalism was an alien category that had become stigmatised through its association with 	<ul style="list-style-type: none"> • The notion of class conflict was highly alien in the Levant's broadly pre-industrial and highly patrimonial society²⁰¹¹. • Moreover, Marxism was viewed as an alien foreign import²⁰¹², one 	<ul style="list-style-type: none"> • Pan-Islamism alone was a familiar and unproblematic identity for the region's Sunni menu people at this time. • However, Salafism and Islamic modernism were more problematic. Both were hostile to

²⁰⁰⁷ As we have noted, Arab Nationalism essentially transitioned from the 'salon' stage directly into ideological competition.

²⁰⁰⁸ As discussed in the next section.

²⁰¹¹ As discussed in the next section.

²⁰¹² Ben Fowkes & Bülent Gökay, "Unholy Alliance: Muslims and Communists – An Introduction," *Journal of Communist Studies and Transition Politics* 25(1) (2009), 13; Dawn, "The Formation of Pan-Arab Ideology," 79; Muñoz, "The Lebanese Communist Party," 92.

<p>anti-Ottoman Christian revolts in the Balkans²⁰⁰⁹.</p> <ul style="list-style-type: none"> • ‘Arab’ was a stigmatised identity associated with violent, religiously-deviant Bedouin raiders – a conception long perpetuated by the Ottoman ‘ulema²⁰¹⁰. 	<p>associated with atheism²⁰¹³ and non-Muslim minorities such as various Christian and Jewish communities²⁰¹⁴.</p>	<p>the Sufi-dominated ‘folk Islam’ dear to most Muslims²⁰¹⁵, while Salafis were further stigmatised as savage Bedouin raiders hardly within the fold of Islam at all²⁰¹⁶.</p>
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- *Movement is repressed/decapitated prior to gaining a substantial public profile:*

Pan-Arab Nationalism:	Marxism:	Pan-Islamism:
<ul style="list-style-type: none"> • Although the Pan-Arab Nationalist ‘vanguard’ – in the form of Emir Faysal and his forces – was decapitated at the 1920 battle of Maysalun, it 	<ul style="list-style-type: none"> • As noted, the CPSL leadership was decapitated immediately upon entry into ideological competition, throwing the 	<ul style="list-style-type: none"> • The Pan-Islamist movement did not suffer decapitation, but this had much to do with the fact that it had no coherent leadership in the first place.

²⁰⁰⁹ Dawn, “From Ottomanism to Arabism,” 378-379; Goldschmidt Jr., *A Concise History*, 175; Salibi, *A House of Many Mansions*, 46.

²⁰¹⁰ Schaebler, “From urban notables”; Keddie, “Pan-Islam,” 17; Rodinson, *The Arabs*, 23; Goldschmidt Jr., *A Concise History*, 194; Ismael and Ismael, “The Legacy of Nationalism,” 59; Rogan, *The Arabs*, 24.

²⁰¹³ Dawn, “The Formation of Pan-Arab Ideology,” 79; Fowkes & Gökay, “Unholy Alliance,” 13.

²⁰¹⁴ Suleiman, “The Lebanese Communist Party,” 137; Muñoz, “The Lebanese Communist Party,” 92; Salem, *Bitter Legacy*, 149; Hanssen, “Communism in the Middle East,” 204; Franzén, “Communism in the Arab World,” 546.

²⁰¹⁵ Sufism had enjoyed a popular revival in the closing decades of the Ottoman Empire, Sultan Abd al-Hamid II (r. 1876-1909) having promoted Sufism as part of his broader strategy to cement his legitimacy and burnish Muslim trans-sectarian solidarity. See: Weismann, “The Politics of Popular Religion,” 41; Fattah, “‘Wahhabi’ influences,” 143; Deringil, “Legitimacy Structures,” 347.

²⁰¹⁶ Schaebler, “From urban notables,” 177; Rogan, *The Arabs*, 71; Commins, *Islamic Reform*, 23 & 32.

immediately acquired new and high-capital leaders in the form of the region's traditional elites.	movement into relative obscurity.	<ul style="list-style-type: none"> Arguably, the collapse of the Ottoman Empire – and Turkish turn towards Turkish nationalism – was akin to such a decapitation, leaving the movement rudderless and without a clear end point²⁰¹⁷.
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- *Condemnation from actors high on social capital:*

Pan-Arab Nationalism:	Marxism:	Pan-Islamism:
<ul style="list-style-type: none"> N/A. 	<ul style="list-style-type: none"> The CPSL does not appear to have faced significant condemnation at this stage, but this was probably likely due to its immediate decapitation. In later vanguard periods it would suffer tremendously (see below). 	<ul style="list-style-type: none"> N/A.

10.1.3. Inhibiting factor neutralisers:

- *Gap appears in the ideological/Movement market.*

Pan-Arab Nationalism:	Marxism:	Pan-Islamism:
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²⁰¹⁷ As Nafi notes, the Turkish abolition of the Caliphate and turn towards Turkish nationalism left the populations of the Arab former-Ottoman territories with nothing but their Arab identity to turn to. See: Nafi, "The Arabs and Modern Turkey," 67. See also: Pelham, *Holy Lands*, 39; Keddie, "Pan-Islam," 28; Wagner, "British intelligence and Arab nationalism," 66-67.

- As noted, the collapse of the Ottoman Empire created an ideological vacuum into which multiple ideologies/movements could compete on essentially equal footing.

- *Ideological concepts or mobilising identities naturalised/rehabilitated:*

Pan-Arab Nationalism:	Marxism:	Pan-Islamism:
<ul style="list-style-type: none"> • As noted, having essentially transitioned from the ‘salon’ stages into ideological competition, neither Pan-Arab Nationalism nor Marxism had had a chance to naturalise among the menu people, nor rehabilitate any stigmas against them. 		<ul style="list-style-type: none"> • Pan-Islamism alone was already naturalised, being a familiar holdover from the Ottoman Empire’s own Pan-Islamist solidarity project.

- *Reduction of repression endured:*

Pan-Arab Nationalism:	Marxism:	Pan-Islamism:
<ul style="list-style-type: none"> • N/A. 	<ul style="list-style-type: none"> • The CPSL would not enjoy reprieve until a general amnesty in 1928²⁰¹⁸, at which point anti-colonial agitation had broadly ended. 	<ul style="list-style-type: none"> • N/A.

- *Loss of social capital among condemnatory actors:*

Pan-Arab Nationalism:	Marxism:	Pan-Islamism:
<ul style="list-style-type: none"> • N/A. 		

10.1.4. Spoiling factors:

- *Alienating decisions and behaviours:*

Pan-Arab Nationalism:	Marxism:	Pan-Islamism:

²⁰¹⁸ Ismael and Ismael, *The Communist Movement*, 14; Muñoz, “The Lebanese Communist Party,” 95.

<ul style="list-style-type: none"> • N/A. 	<ul style="list-style-type: none"> • The CPSL alienated many potential followers through the militantly atheistic tone of much of its propaganda, which offended the sensibilities of the generally religious Sunni menu people²⁰¹⁹. 	<ul style="list-style-type: none"> • N/A.
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10.1.5. Scoring factors:

- *Redemption/renunciation of past alienating decisions and behaviours:*

Pan-Arab Nationalism:	Marxism:	Pan-Islamism:
<ul style="list-style-type: none"> • N/A. 		

- *Enduring repression after gaining a substantial public profile:*

Pan-Arab Nationalism:	Marxism:	Pan-Islamism:
<ul style="list-style-type: none"> • N/A. 		

- *Acts of courage/self-sacrifice/integrity/prototypicality in marked contrast to traditional elites/rival movements:*

Pan-Arab Nationalism:	Marxism:	Pan-Islamism:
<ul style="list-style-type: none"> • N/A. 	<ul style="list-style-type: none"> • Due to the imprisonment of its leaders, the CPSL's activism was curtailed, while elite-led factions of the Pan-Arab Nationalist and Pan-Islamic tendencies were able 	<ul style="list-style-type: none"> • N/A.

²⁰¹⁹ Ismael, *The Communist Movement*, 2.

	to continue earning laurels.	
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10.2. Ideological competition 2: the coming of the *Lebanese Crisis*, c. 1955-1958:

10.2.1. Facilitating factors:

- *Relevant diagnostic frames:*

Pan-Arab Nationalism:	Marxism:
<ul style="list-style-type: none"> • Pan-Arab Nationalism served to compellingly diagnose the lines of belligerence leading to the 1958 crisis, pitching what readily appeared to be an Arab people yearning for unity obstructed by a non-Arab-identifying Maronite community and its Western allies determined to stand against that aspiration for their own gain. 	<ul style="list-style-type: none"> • The CPL was able to make itself relevant in so far as it spoke out against the imperialism of the Eisenhower Doctrine (and Maronite complicity in embracing it)²⁰²⁰. However, beyond this anti-imperialist critique, its broader diagnostic frames remained orthodoxly Marxist, unnaturalised to the conditions of Lebanon and so deeply irrelevant beyond the country's small proletariat²⁰²¹. • Moreover, its ideological stances were confused and capricious at this time, vacillating between, on one hand, denial of the existence of an Arab Nation (and thus defence of Lebanese sovereignty against the UAR)²⁰²² and criticism of Nasser as "terrorist dictatorship [...] subordinated to the interests of the

²⁰²⁰ Suleiman, "The Lebanese Communist Party," 142.

²⁰²¹ As discussed in the next section.

²⁰²² Suleiman, "The Lebanese Communist Party," 151.

	big bourgeoisie in Cairo” ²⁰²³ ; before then endorsing Nasser and the UAR ²⁰²⁴ .
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- *Elite support (sincere or rhetorical), or credible means of subverting elite influence:*

Pan-Arab Nationalism:	Marxism:
<ul style="list-style-type: none"> • While the sincerity of zu‘amā’ support for Nasserist Pan-Arab Nationalism was often suspect, they nevertheless supported it rhetorically and mobilised their constituents in favour of it. This support for a credible ideological/movement enabled the zu‘amā’ to fortify the flagging VSC, thus keeping the menu people onside and deferential to their preferred ideology²⁰²⁵. 	<ul style="list-style-type: none"> • The CPL was actively shunned by the Sunni zu‘amā’²⁰²⁶. Moreover, it stood little chance of securing popular Sunni support while the VSC stood intact thanks to the zu‘amā’s embrace of a credible ideology/movement.

- *Strong leadership:*

Pan-Arab Nationalism:	Marxism:
<ul style="list-style-type: none"> • Pan-Arab Nationalism enjoyed strong leadership both regionally and locally: • Regionally, Nasser possessed both the charisma to inspire admirers and the proven abilities and resources to equip, 	<ul style="list-style-type: none"> • In contrast, the CPL’s leaders were obscure, unknown, and suspect, having been forced to operate underground and discredited by decades of demonisation by zu‘amā’ and ‘ulema alike²⁰²⁹.

²⁰²³ Ismael and Ismael, *The Communist Movement*, 55.

²⁰²⁴ Suleiman, “The Lebanese Communist Party,” 151.

²⁰²⁵ As discussed in the previous chapter.

²⁰²⁶ Hottinger, *Zu‘amā’ and Parties*, 138.

²⁰²⁹ See below.

<p>coordinate, and unify a movement for decisive action²⁰²⁷.</p> <ul style="list-style-type: none"> Locally, the Pan-Arab Nationalist movement was lent charismatic, familiar, and trusted leadership by the traditional zu‘amā’; leaders who, moreover, coordinated with one another to present a united anti-establishment front²⁰²⁸. 	
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- Sufficient resources (access to arms, means of dissemination, organisation, etc.):*

Pan-Arab Nationalism:	Marxism:
<ul style="list-style-type: none"> The Pan-Arab Nationalist movement was flush with arms, burnished both by the zu‘amā’ and massive shipments from both Egyptian and Syrian sides of the UAR. Allegedly, it also received large numbers of covert fighters from these states²⁰³⁰. Likewise, the movement benefited from ample means of dissemination. Most significantly, Nasser made great use of his radio station – <i>Voice of the Arabs</i> 	<ul style="list-style-type: none"> While the CPL does seem to have acquired arms for the 1958 crisis, it was hugely outmatched by those available to the Pan-Arab Nationalist movement. Similarly, the CPL remained reliant on its banned newspapers for disseminating its ideology²⁰³⁴, leaving it utterly outmatched by those means of dissemination and organisation available to the Pan-Arab Nationalists.

²⁰²⁷ Nasser’s leadership is discussed at length in extant leadership, notably: Elie Podeh and Onn Winckler, “Nasserism as a form of populism,” in *Rethinking Nasserism: Revolution and Historical Memory in Modern Egypt*, eds. Elie Podeh and Onn Winckler (Gainesville: University Press of Florida, 2004), 16; Leonard Binder, “Gamal ‘Abd al-Nasser: Iconology, Ideology, and Demonology,” in *Rethinking Nasserism: Revolution and Historical Memory in Modern Egypt*, eds. Elie Podeh and Onn Winckler (Gainesville: University Press of Florida, 2004), 48 & 66; Tim Mackintosh-Smith, *Arabs: a 3,000-year history of peoples, tribes and empires* (New Haven and London: Yale University Press, 2019), 468; Mackey, *Lebanon*, 120; Ismael, *The Arab Left*, 81; Attié, *Struggle*, 186 & 190.

²⁰²⁸ As seen in the previous chapter.

²⁰³⁰ Attié, *Struggle*, 186 & 190; Khalaf, *Civil and Uncivil*, 110-111.

²⁰³⁴ Ismael and Ismael, *The Communist Movement*, 39.

<p>– to reach out directly to a menu people still frequently illiterate but flush with newly available transistor radios²⁰³¹. Locally, the zu ‘amā’ owned their own radio stations and newspapers²⁰³², while even schools in Sunni areas taught the pro-Nasserist line²⁰³³.</p>	
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- *Clear precedents for success (prognostic or strategic):*

Pan-Arab Nationalism:	Marxism:
<ul style="list-style-type: none"> • Nasser himself embodied the proven vitality of the Pan-Arab Nationalist project, most vividly in his establishment of the UAR (which Lebanese Sunnis clamoured to join) but also in his string of anti-imperialist triumphs, as noted in chapter 6. • Moreover, in contrast to the precedents of success available to the CPL – which were only examples to be <i>emulated</i> – Nasser provided an active and directly applicable tide of victory to be <i>joined</i>. 	<ul style="list-style-type: none"> • While the CPL could still cite the success of the 1917 Russian Revolution in addition to the 1949 Chinese Revolution as precedents for success, these were geographically, temporally, and culturally distant examples compared to the recent, culturally familiar, and immediately and directly applicable triumphs of Nasser.

²⁰³¹ Labelle Jr., “A New Age of Empire? 150; Sorby, “Lebanon: The Crisis of 1958,” 84; Mackintosh-Smith, *Arabs*, 468; Fadi A. Bardawil, *Revolution and disenchantment: Arab Marxism and the binds of emancipation* (Durham and London: Duke University Press, 2020), 40; Khalaf, *Civil and Uncivil*, 114; Rogan, *The Arabs*, 384; Attié, *Struggle*, 113.

²⁰³² Attié, *Struggle*, 131.

²⁰³³ Bardawil, *Revolution and disenchantment*, 41; el-Solh, *Lebanon and Arabism*, 314; Dawn, “The Formation of Pan-Arab Ideology,” 70; Kramer, “Arab Nationalism,” 182; Aboultaif, *Power Sharing*, 192.

- *De-intellectualising personalities and events (charismatic leaders, martyrs, glamorous ‘poster-boys’, heroic episodes, etc.):*

Pan-Arab Nationalism:	Marxism:
<ul style="list-style-type: none"> • Nasser personified the Pan-Arab Nationalist tendency through his charisma and proven track record of David vs. Goliath anti-imperialism. Moreover, he was prototypical, emerging from relatively humble origins²⁰³⁵, and able to claim personal heroic and self-sacrificing credentials as a military officer wounded in battle during the 1948 Arab-Israeli war²⁰³⁶. He provided a visceral and admirable face to the ideology’s otherwise abstract ideals. 	<ul style="list-style-type: none"> • While culturally distant Marxist heroes like Lenin, Stalin, and Mao did exist, they could not compete with the culturally relevant, contemporary, and immediately relevant charisma and heroism of Nasser and his camp.

- *Endorsement by communal actors with high social capital:*

Pan-Arab Nationalism:	Marxism:
<ul style="list-style-type: none"> • The Pan-Arab Nationalist project was championed by the traditional zu‘amā’ – whose VSC remained intact in doing so – as well as by the ‘ulema²⁰³⁷. 	<ul style="list-style-type: none"> • Marxism was demonised by both zu‘amā’ and ‘ulema as a foreign, subversive, atheist force²⁰³⁸.

10.2.2. Inhibiting factors:

- *Ideological/movement market is ‘saturated’:*

²⁰³⁵ Nasser was the son of a postmaster who had “acute sense of what the people wanted and needed [which] allowed him to communicate with them better than practically anyone before him or since.” See: Podesh and Winckler, “Nasserism,” 16.

²⁰³⁶ Saul S. Friedman, *A History of the Middle East* (Jefferson, NC., and London: McFarland & Company, Inc., Publishers, 2006), 256; and Morris, *1948*, 276.

²⁰³⁷ Romero, “Discourse and Mediation, 577; Khalaf, *Civil and Uncivil*, 114; Aboultaif, *Power Sharing*, 92.

²⁰³⁸ Suleiman, “The Lebanese Communist Party,” 145; Haugbolle, “Social Boundaries,” 440.

Pan-Arab Nationalism:	Marxism:
<ul style="list-style-type: none"> • Pan-Arab Nationalism was able to saturate the ideological field, with Nasser’s socialising reforms enabling it to cater to the same socioeconomic concerns as the Marxist tendency with none of the stigma, alongside additional appeals to religious and ethnic identity²⁰³⁹. 	<ul style="list-style-type: none"> • In contrast, the subordinate Marxist tendency was unable to offer anything Nasserist Pan-Arab Nationalism could not, the latter accommodating for socioeconomic concerns through its socialist leanings and anti-imperialist concerns through its nationalism.

- *Ideology is too intellectual/abstract:*

Pan-Arab Nationalism:	Marxism:
<ul style="list-style-type: none"> • Through his personal charisma and populist style, Nasser was able to embody the Pan-Arab Nationalist project and enthuse the menu people through simplified slogans and by translating abstract ideas into tangible real-world success stories²⁰⁴⁰. 	<ul style="list-style-type: none"> • As before, the CPL had still failed to de-intellectualise its abstract orthodox Marxist ideology²⁰⁴¹.

- *Ideological concepts or mobilising identities are alien or suspect:*

Pan-Arab Nationalism:	Marxism:
<ul style="list-style-type: none"> • The previously alien notions of nationalism and Arab identity had been naturalised by this time 	<ul style="list-style-type: none"> • Marxism’s ideological concepts remained abstract, irrelevant (on account of Lebanon’s still small

²⁰³⁹ Nasser is broadly credited for providing a Sunni Islamic gloss to both Arab Nationalism and socialism. See: Elie Salam, “Nationalism and Islam,” *The Muslim World* 52(4) (Oct., 1962), 278; Bruce Riedel, *Beirut 1958: How America’s wars in the Middle East began* (Washington, DC: Brookings Institution Press, 2020), 15; Ismael, *The Arab Left*, 79 & 81; Quandt, “Palestinian Nationalism,” 54.

²⁰⁴⁰ As Kramer notes, Pan-Arab Nationalism under Nasser was less defined by doctrine than my Nasser’s own “warm glow” – see: Kramer, “Arab Nationalism,” 186. Similar sentiments are expressed in: Mackey, *Lebanon*, 120; Podeh and Winckler, “Nasserism,” 16-17.

²⁰⁴¹ Baun, *Winning Lebanon*, 140; Haugbolle, “Dealing with Dissent,” 83.

through decades of educational and propagandistic indoctrination and normalisation ²⁰⁴² .	proletariat) ²⁰⁴³ and demonised (by zu‘amā’ and ‘ulema).
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- *Movement is repressed/decapitated prior to gaining a substantial public profile:*

Pan-Arab Nationalism:	Marxism:
<ul style="list-style-type: none"> • N/A 	<ul style="list-style-type: none"> • Since its decision to endorse the establishment of Israeli in 1948, the CPL had been banned and driven underground²⁰⁴⁴.

- *Condemnation from actors high on social capital:*

Pan-Arab Nationalism:	Marxism:
<ul style="list-style-type: none"> • On the contrary, as noted it was championed by both zu‘amā’ and ‘ulema. 	<ul style="list-style-type: none"> • As noted, the CPL had been condemned and demonised by both zu‘amā’ and ‘ulema.

10.2.3. Inhibiting factor neutralisers:

- *Gap appears in the ideological/movement market:*

Pan-Arab Nationalism:	Marxism:
<ul style="list-style-type: none"> • N/A. 	<ul style="list-style-type: none"> • As noted, the CPL was forced to compete in an ideological/movement market already saturated by Nasserist Pan-Arab Nationalism.

- *Ideology’s concepts or mobilising identities naturalised/rehabilitated:*

Pan-Arab Nationalism:	Marxism:
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²⁰⁴² See footnote 2216 above.

²⁰⁴³ As noted, and further discussed in the next section.

²⁰⁴⁴ Kardahji, “A Deal with the Devil,” 147; Franzén, “Communism in the Arab World,” 560; Salem, *Bitter Legacy*, 159; Khayat, “The Left,” 30; Baun, *Winning Lebanon*, 140.

<ul style="list-style-type: none"> As noted, by this time, 'nationalism' and 'Arab' identity had been naturalised and rehabilitated by decades of Pan-Arab Nationalist education and political discourses. 	<ul style="list-style-type: none"> As noted, Marxism remained obscure and stigmatised.
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- Reduction of repression endured:*

Pan-Arab Nationalism:	Marxism:
<ul style="list-style-type: none"> N/A. 	<ul style="list-style-type: none"> Though able to function with a low profile, the CPL remained officially banned²⁰⁴⁵.

- Loss of social capital among condemnatory actors:*

Pan-Arab Nationalism:	Marxism:
<ul style="list-style-type: none"> N/A. 	

10.2.4. Spoiling factors:

- Alienating decisions and behaviours:*

Pan-Arab Nationalism:	Marxism:
<ul style="list-style-type: none"> N/A. 	<ul style="list-style-type: none"> The CPL had tarnished itself through numerous alienating policy stances, mostly at the behest of the Kremlin, to which it was seen as being too subservient²⁰⁴⁶: It has cooperated closely with the French occupying forces during the 1930s²⁰⁴⁷, even if eventually

²⁰⁴⁵ It would not be legalised until 1971 – see: Hazran, “Lebanon’s Revolutionary Era,” 167; Traboulsi, *A History of Modern Lebanon*, 156; Naor, “The Quest for a balance,” 999.

²⁰⁴⁶ Haugbolle, “Dealing with Dissent,” 84; Ismael, *The Communist Movement*, 1.

²⁰⁴⁷ The Comintern had decreed such a policy, urging communist parties to ally with any and all anti-fascist actors. See: Suleiman, “The Lebanese Communist Party,” 149; Ismael and Ismael, *The Communist Movement*, 29; Salem, *Bitter Legacy*, 153; Hanssen, “Communism in the Middle East,” 209.

	<p>helping to eject them in the 1940s²⁰⁴⁸.</p> <ul style="list-style-type: none"> • It had moderated its political platform in the 1940s to the extent that it came to hold little anti-establishment potential²⁰⁴⁹. • It endorsed the establishment of Israel in 1948²⁰⁵⁰. • It denounced Nasser and the UAR at Nasser's point of greatest popularity²⁰⁵¹.
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10.2.5. Scoring factors:

- *Redemption/renunciation of past alienating decisions and behaviours:*

Pan-Arab Nationalism:	Marxism:
<ul style="list-style-type: none"> • N/A. 	<ul style="list-style-type: none"> • While it eventually turned against French colonialism, this redemption was overshadowed by its endorsement of Israel. • While it eventually endorsed Nasser and the UAR²⁰⁵², this occurred at such a late stage this it likely appeared insincere to many.

- *Enduring repression after gaining a substantial public profile:*

Pan-Arab Nationalism:	Marxism:

²⁰⁴⁸ Salem, *Bitter Legacy*, 155; Suleiman, "The Lebanese Communist Party," 149; Kardahji, "A Deal with the Devil," 139.

²⁰⁴⁹ Again inline with Comintern policy, which had urged communist parties in colonised states to moderate their platforms so as to forge cooperative bonds with the indigenous anti-colonial bourgeoisie. See: Kardahji, "A Deal with the Devil" 140; Ismael and Ismael, *The Communist Movement*, 32; Suleiman, "The Lebanese Communist Party," 140 & 147; Haugbolle, "Dealing with Dissent," 85.

²⁰⁵⁰ After stalwartly standing against the establishment of a Jewish State in Israel, the CPL about-turned on command of the Comintern and endorsed it in 1947, see: Kanaan, *Lebanon*, 209; Yacoub, "The Lebanese Left," 85; Franzén, "Communism in the Arab World," 560; Hanssen, "Communism in the Middle East," 212.

²⁰⁵¹ Ismael and Ismael, *The Communist Movement*, 55; Suleiman, "The Lebanese Communist Party," 151.

²⁰⁵² Suleiman, "The Lebanese Communist Party," 151.

- N/A.

- *Acts of courage/self-sacrifice/integrity/prototypicality in marked contrast to traditional elites/rival movements:*

Pan-Arab Nationalism:	Marxism:
<ul style="list-style-type: none"> • The zu‘amā’ were able to share in Nasser’s heroic defiance of imperialism by championing his Pan-Arab Nationalist project locally. 	<ul style="list-style-type: none"> • The CPL’s quiet activism paled in comparison to the highly visible displays of courage and heroism by the zu‘amā’-led anti-establishment forces.

10.3. Ideological competition 3: Leadup to the 1975-6 *Two-Year War*:

10.3.1. Facilitating factors:

- *Relevant diagnostic frames:*

Pan-Arab Nationalism:	Marxism:	Islamism:
<ul style="list-style-type: none"> • Given the degree to which the 1975-6 conflict constituted unfinished business from 1956²⁰⁵³, Pan-Arab Nationalism remained a compelling diagnosis given the lines of belligerence. • Additionally, the increasingly socialist tone of Nasserist Pan-Arab Nationalism during this period could still 	<ul style="list-style-type: none"> • The Marxist tendency – which by this stage had diffused, becoming less dogmatic and more ‘Arabised’ – had become far more relevant to local settings in its narratives. • Moreover, the discrediting of the Pan-Arab Nationalist regimes and zu‘amā’ lent credence to Marxist analyses of 	<ul style="list-style-type: none"> • The Islamist tendency also gained increased vitality, both in its ability to account for the broadly Muslim-Christian lines of belligerence alongside its ability to account for the corruptions of the secular Arab/Muslim elites.

²⁰⁵³ As discussed in the previous chapter.

rival the Marxist tendency in socioeconomic appeals.	the inevitable convergence of interests between foreign imperialists and indigenous bourgeois and petit-bourgeois classes.	
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- *Elite support (sincere or rhetorical), or credible means of subverting elite influence:*

Pan-Arab Nationalism:	Marxism:	Islamism:
<ul style="list-style-type: none"> • While Arab ‘unity of purpose’ remained an evocative element of zu‘amā’ discourse, demands for Arab political unity had fallen silent since 1958, ridding it of any real anti-establishment vitality. 	<ul style="list-style-type: none"> • While the zu‘amā’ were threatened by the LNM, they felt bound to offer rhetorical support to the LNM’s PRM allies, and champion their rights to operate²⁰⁵⁴ – which directly strengthened the LNM who cooperated with them. • Through the vast funding lavished upon the PRM by Egypt, Syria, Iraq, Libya, Algeria, China, 	<ul style="list-style-type: none"> • The Islamist tendency at this stage lacked significant funding²⁰⁵⁹ and appears to have been barely on the radar of the zu‘amā’. Thus, they were unable to benefit from, or else subvert the need for, elite support.

²⁰⁵⁴ Sorby, “Lebanon during the Shāril Hulw Presidency,” 101; Naor, “The Quest for a balance,” 993; Picard, *Lebanon*, 85; el Khazen, *The Breakdown of the State*, 55, 150 & 208; Traboulsi, *A History of Modern Lebanon*, 155; Deeb, *The Lebanese Civil War*, 63.

²⁰⁵⁹ Of the two Islamist factions present in Lebanon at this time – *Youth of Muhammad* and the *Islamic Association* (see next session), the former was apolitical and lacked organisation or funding at this stage (Gade, “Return to Tripoli,” 37) while the latter was focussing on non-violent proselytization and was investing what funds it possessed in schools (Rabil, *Salafism in Lebanon*, 84) which, while valuable could not subvert the zu‘amā’s patronage networks significantly.

	<p>etc.²⁰⁵⁵, the PRM was able both to equip the LNM²⁰⁵⁶, subvert the zu‘amā’s patronage networks²⁰⁵⁷ and weaken the Qabadayat off zu‘amā’ dependence²⁰⁵⁸.</p>	
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- *Strong leadership:*

Pan-Arab Nationalism:	Marxism:	Islamism:
<ul style="list-style-type: none"> • Leadership for Pan-Arab Nationalism was essentially non-existent by this time, with both the zu‘amā’ and Arab Nationalist regimes having defaulted to a vague Arab ‘unity of purpose’ mantra 	<ul style="list-style-type: none"> • The LNM-PRM benefited from the leadership of Druze za‘īm Kamal Jumblatt, who was both a unifying figure for the movement’s disparate trends²⁰⁶¹, held positions of authority within the 	<ul style="list-style-type: none"> • The Islamist tendency’s leaders were both obscure, underequipped, and relatively quietist during this period²⁰⁶⁴.

²⁰⁵⁵ Thanks to these contributors, the PLO faction of the PRM is estimated to have had a higher annual budget than the Lebanese state by its height or power. See: Anne Marie Baylouny, “Born Violent: Armed political parties and non-state governance in Lebanon’s Civil War,” *Small Wars & Insurgencies* 25(2) (2014), 335. See also: Yezid Sayigh, “Turning Defeat into Opportunity: The Palestinian Guerrillas after the June 1967 War,” *Middle East Journal* 46(2) (Spring 1992), 240-260; Quandt, “Palestinian Nationalism,” 13; Hussain, “The Palestine Liberation Movement,” 2027; Sing, “Brothers in Arms,” 12.

²⁰⁵⁶ Badran, “Lebanon’s Militia Wars,” 169; Picard, *Lebanon*, 101; Rougier, *The Sunni Tragedy*, 4.

²⁰⁵⁷ The PRM established in Sunni population centres a vast network of medical, agricultural, economic, welfare, industrial/labour, and educational services – including 9 hospitals. So expansive was this network in Sunni West Beirut that it acquired the nickname *Fatahland*, in deference to the PLO’s lead faction – Fatah’s – alleged creation of a state within a state. See: Giacaman, “Political Representation,” 34; Hirst, *Beware of Small States*, 87; Hanf, *Coexistence*, 169; Khalidi, *Under Siege*, 32.

²⁰⁵⁸ Many Qabadays – alienated from their zu‘amā’ patrons – came under the employ, patronage and protection of PRM factions. See: Michael Johnson, “Political Bosses and Strong-Arm Retainers in the Sunni Muslim Quarters of Beirut, 1943-1992,” in *Cities in the developing world: Issues, theory, and policy*, eds. Joseph Gugler (New York: Oxford University Press, 1997), 334; el Khazen, *The Breakdown of the State*, 332 & 365; Harris, *Lebanon*, 196; Hanf, *Coexistence*, 120 & 127; Petran, *The Struggle*, 174.

²⁰⁶¹ Hazran, “Lebanon’s Revolutionary Era,” 167; Petran, *The Struggle*, 124-125.

²⁰⁶⁴ As discussed in the next section.

<p>over political unity²⁰⁶⁰.</p>	<p>system without being subservient to it²⁰⁶², and constantly burnished his integrity and heroic credentials by acting in a non-self-serving way in constant contrast to the Lebanon's other zu' amā'²⁰⁶³.</p>	
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- Sufficient resources (access to arms, means of dissemination, organisation, etc.):

Pan-Arab Nationalism:	Marxism:	Islamism:
<ul style="list-style-type: none"> • Again, the Pan-Arab Nationalist movement was essentially dormant by this stage. 	<ul style="list-style-type: none"> • The Marxist tendency was flush with weaponry on account of the vast shipments provided by multiple states to the PRM, which were then shared with the LNM²⁰⁶⁵. • The PRM and LNM both ran multiple radio channels and 	<ul style="list-style-type: none"> • Much like the CPL in 1958, the two extant Islamist factions at this time (see next section) both succeeded in forming small armed militias in time for the conflict, but both were dwarfed by that

²⁰⁶⁰ As noted, this change of tack was led by Nasser, and by the late 1960s, fealty to Arab Nationalism was tested not by any political unity but by a vague unity of purpose in supporting the PRM.

²⁰⁶² For example, he used his authority as Minister of the Interior to legalise long-banned Marxist tendency factions in 1971 – see: Hazran, “Lebanon’s Revolutionary Era,” 167.

²⁰⁶³ While all other zu' amā' attempted to maintain the *status quo* which guaranteed their privileges – and stamp down on anti-establishment movements that threatened it – Jumblatt was a lone voice in selflessly calling for the downfall of the *status quo* he benefited from, and championing the welfare of the menu people exploited by it. See: Hazran, “Lebanon’s Revolutionary Era,” 165-166; Abu Khalil, “Druze, Sunni and Shiite,” 132; Gilmour, *Lebanon*, 73; Petran, *The Struggle*, 130 & 135.

²⁰⁶⁵ See footnote 2238 above.

	<p>newspapers²⁰⁶⁶, as well as running ideological awareness campaigns that were deeply integrated into the daily life of the menu people by paring them with service provisions and patronage institutions²⁰⁶⁷.</p>	<p>available to the PRM-LNM²⁰⁶⁸.</p> <ul style="list-style-type: none"> • Likewise, while the IA benefited from a radio station²⁰⁶⁹, it was dwarfed by the media output of the Marxist tendency.
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- *Clear precedents for success (prognostic or strategic):*

Pan-Arab Nationalism:	Marxism:	Islamism:
<ul style="list-style-type: none"> • On the contrary, the Pan-Arab Nationalist movement provided only precedents for failure – with the collapse of the short-lived UAR, failed wars against Israel, and repeated episodes of Arab infighting. 	<ul style="list-style-type: none"> • By this stage, the Marxist tendency was flush with precedents for the success of its strategic frames – explicitly seeking to emulate the success of ‘People’s Wars’ in China, Vietnam, Algeria, Cuba, etc., which were directly contrasted against the repeated failures of the Arab 	<ul style="list-style-type: none"> • The Islamist tendency at this time could not cite any clear precedents for success, only recall the past glory days of Islam which, according to their ideological narrative, had been achieved by the religious rectitude of the early Caliphs.

²⁰⁶⁶ Kliot, “The Collapse,” 60; Naor, “The Quest for a balance,” 1003; el Khazen, *The Breakdown of the State*, 177.

²⁰⁶⁷ Giacaman, “Political Representation,” 34.

²⁰⁶⁸ See next section.

²⁰⁶⁹ Rabil, “Fathi Yakan,” 60.

	Nationalist regimes ²⁰⁷⁰ .	
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- *De-intellectualising personalities and events (charismatic leaders, martyrs, glamorous ‘poster-boys’, heroic episodes, etc.):*

Pan-Arab Nationalism:	Marxism:	Islamism:
<ul style="list-style-type: none"> • As noted, by this stage, the old heroes of Pan-Arab Nationalism (chiefly Nasser) had been supplanted by negative images of corrupt petit-bourgeois Arab Nationalist regimes protective of their privileges²⁰⁷¹. 	<ul style="list-style-type: none"> • The Marxist tendency was flush with charismatic leaders, heroes, martyrs, heroic episodes, and glamorous poster boys, both locally and globally²⁰⁷²: • Jumblatt was charismatic and heroic – his integrity constantly contrasted against that of his fellow zu‘amā’²⁰⁷³, while the fighters of the LNM-PRM were 	<ul style="list-style-type: none"> • N/A.

²⁰⁷⁰ As noted, the PRM/Marxist tendency’s key critique was that the bourgeois and petit-bourgeois Arab Nationalist regimes had consistently failed due to their class interests, and victory could only be guaranteed by a people’s war fought by the menu people who held no stake in the *status quo*. As proof of this, they explicitly cited the successes of Marxist revolutionaries across the Third World, producing from it a vast and prolific new revolutionary literature genre. See: Chamberlin, *The Global Offensive*, 19-20; Sune Haugbolle, “The New Arab Left and 1967,” *British Journal of Middle Eastern Studies* 44(4) (2017), 510; Nisan, “The PLO and Vietnam,” 192-193; Meier, “The Palestinian Fidâ’i,” 327; Picard, *Lebanon*, 96.

²⁰⁷¹ Particularly in light of the critiques that followed the Arab defeat in the 1967 Arab-Israeli War, outlined above and in the previous chapter.

²⁰⁷² In addition to Kamal Jumblatt discussed above, the PRM-LNM feted heroes local and global, from martyrs who fought to defend the PRM from LAF and Maronite militia attacks within Lebanon itself, to the PRM’s stand against Israeli forces at the 1968 Battle of Karameh, to the heroes of the Cuban revolutionaries, Algerian FLN, Vietnamese Viet Cong, etc. See: Joel Beinin, *Workers and Thieves: Labor Movements and Popular Uprisings in Tunisia and Egypt* (California: Stanford University Press, 2015), 26; W. Andrew Terrill, “The Political Mythology of the Battle of Karameh,” *Middle East Journal* 55(1) (Winter 2011), 98; Petran, *The Struggle*, 101; Meier, “The Palestinian Fidâ’i,” 326; Nisan, “The PLO and Vietnam,” 185; Chamberlin, *The Global Offensive*, 19, 26, 102; Laleh Khalili, *Heroes and Martyrs of Palestine: The Politics of National Commemoration* (New York: Cambridge University Press, 2007), 132.

²⁰⁷³ See footnote 2246 above.

	<p>lionised in their courageous struggles against both Israel and the LAF and Maronite militias²⁰⁷⁴.</p> <ul style="list-style-type: none"> • Globally, the Marxist tendency lionised heroes from the spectrum of Third World Revolutionary movements, from individuals like Yasser Arafat and 'Che' Guevara, to movements like the Algerian FLN and Vietnamese Viet Cong²⁰⁷⁵. 	
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- *Endorsement by communal actors with high social capital:*

Pan-Arab Nationalism:	Marxism:	Islamism:
<ul style="list-style-type: none"> • As noted, endorsements of Arab political unity had long fallen silent. 	<ul style="list-style-type: none"> • N/A. 	<ul style="list-style-type: none"> • N/A.

10.3.2. Inhibiting factors:

- *Ideological/movement market is 'saturated':*

Pan-Arab Nationalism:	Marxism:	Islamism:
<ul style="list-style-type: none"> • N/A. 	<ul style="list-style-type: none"> • The Marxist tendency saturated the 	<ul style="list-style-type: none"> • The fledgling Islamist tendency

²⁰⁷⁴ As described in chapters 6 and 7.

²⁰⁷⁵ Ibid.

	<p>ideological/movement market by this time, through its continued championing of Arab identity, increasing harmony with Islamic identity and values (see below), anti-imperialist and sectarian critique (while an anti-sectarian movement, its class analyses compellingly conceptualised the sectarian lines of belligerence – the wealthier Maronite elite people seeking to defend their privileges).</p>	<p>thus struggled to offer anything not already championed by the newly naturalised Marxist tendency.</p>
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- *Ideology is too intellectual/abstract:*

Pan-Arab Nationalism:	Marxism:	Islamism:
<ul style="list-style-type: none"> • N/A. 	<ul style="list-style-type: none"> • The Marxist tendency had been deintellectualised due to the glamourisation and lived examples of the LNM and PRM cadres, who provided heroic faces for the 	<ul style="list-style-type: none"> • The Islamist tendency remained overwhelmingly intellectual at this time, in both membership and doctrine²⁰⁷⁷.

²⁰⁷⁷ See next section.

	<p>movement.</p> <p>Meanwhile, many of its key tenets – notably socialism – had been de-intellectualised in the populist rhetoric of Nasser²⁰⁷⁶.</p>	
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- *Ideology's concepts or mobilising identities are alien or suspect:*

Pan-Arab Nationalism:	Marxism:	Islamism:
<ul style="list-style-type: none"> • N/A 	<ul style="list-style-type: none"> • Marxism had become naturalised and lost much of its stigmatising attachments – see below. 	<ul style="list-style-type: none"> • The iconoclasm of extant Islamist movements²⁰⁷⁸ did not sit well with the popular Sufi trend in Lebanon²⁰⁷⁹.

- *Movement is repressed/decapitated prior to gaining a substantial public profile:*

Pan-Arab Nationalism:	Marxism:	Islamism:
<ul style="list-style-type: none"> • N/A. 		

- *Condemnation from actors high on social capital:*

Pan-Arab Nationalism:	Marxism:	Islamism:
<ul style="list-style-type: none"> • N/A. 	<ul style="list-style-type: none"> • The Marxist tendency continued to be condemned by the 'ulema²⁰⁸⁰. 	<ul style="list-style-type: none"> • N/A.

10.3.3. Inhibiting factor neutralisers:

²⁰⁷⁶ Ismael, *The Arab Left*, 81; Quandt, "Palestinian Nationalism," 54.

²⁰⁷⁸ As noted in Chapter 7.

²⁰⁷⁹ As noted above

²⁰⁸⁰ Haugbolle, "Social Boundaries," 440.

- *Gap appears in the ideological/movement market:*

Pan-Arab Nationalism:	Marxism:	Islamism:
<ul style="list-style-type: none"> • Pan-Arab Nationalism's loss of vitality created a gap into which the Marxist and Islamist tendencies could step. 		

- *Ideology's concepts or mobilising identities naturalised/rehabilitated:*

Pan-Arab Nationalism:	Marxism:	Islamism:
<ul style="list-style-type: none"> • N/A. 	<ul style="list-style-type: none"> • The CPL rehabilitated itself by distancing itself from the Kremlin²⁰⁸¹, 'Arabising' and populising its discourse²⁰⁸² and forging alliances with other popularising factions – chiefly the PRM²⁰⁸³. • Nasser led the way in naturalising socialism by integrating it into his charismatic, populist and Islam-friendly brand of Pan-Arab Nationalism²⁰⁸⁴. 	<ul style="list-style-type: none"> • N/A.

- *Reduction of repression endured:*

Pan-Arab Nationalism:	Marxism:	Islamism:
<ul style="list-style-type: none"> • N/A. 	<ul style="list-style-type: none"> • The CPL and a host of fellow banned Marxist/progressive 	<ul style="list-style-type: none"> • N/A.

²⁰⁸¹ Guirguis, "The New Left," 66.

²⁰⁸² Picard, *Lebanon*, 100; Rowayheb, "Lebanese Militias," 307.

²⁰⁸³ Khayat, "The Left," 30.

²⁰⁸⁴ See footnote 2259 above.

	parties were all legalised in 1971 by LNM leader Kamal Jumblatt, in his capacity as Minister of the Interior ²⁰⁸⁵ .	
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- *Loss of social capital among condemnatory actors:*

Pan-Arab Nationalism:	Marxism:	Islamism:
<ul style="list-style-type: none"> • N/A. 	<ul style="list-style-type: none"> • As noted in chapter 6, the zu‘amā’ had lost capital on account of their alienating, self-serving stance towards the domestic protest movement, coupled with the collapse of their VSC and failure to champion any viable ideology/movement in the face of the HSC breakdown. 	<ul style="list-style-type: none"> • N/A.

10.3.4. Spoiling factors:

- *Alienating decisions and behaviours:*

Pan-Arab Nationalism:	Marxism:	Islamism:
<ul style="list-style-type: none"> • As noted, the Arab Nationalist regimes alienated themselves through their lack of commitment to Arab 	<ul style="list-style-type: none"> • N/A. 	<ul style="list-style-type: none"> • N/A.

²⁰⁸⁵ Traboulsi, *A History of Modern Lebanon*, 156; al-Khazen, “Kamal Jumblatt,” 181; Naor, “The Quest,” 999; Hazran, “Lebanon’s Revolutionary Era,” 167.

unity, manifesting in the collapsed UAR, military failures against Israel and episodes of intra-Arab infighting.		
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10.3.5. Scoring factors:

- *Redemption/renunciation of past alienating decisions and behaviours:*

Pan-Arab Nationalism:	Marxism:	Islamism:
<ul style="list-style-type: none"> • N/A. 	<ul style="list-style-type: none"> • Through its courageous protection of the PRM and championing of the domestic protest movement²⁰⁸⁶, the CPL and its allies rehabilitated their anti-imperialist, populist, revolutionary credentials. 	<ul style="list-style-type: none"> • N/A.

- *Enduring repression after gaining a substantial public profile:*

Pan-Arab Nationalism:	Marxism:	Islamism:
<ul style="list-style-type: none"> • N/A. 	<ul style="list-style-type: none"> • The LAF and Maronite militias attempted to contain the PRM and its LNM allies by force, prompting outrage towards them and sympathy and 	<ul style="list-style-type: none"> • N/A.

²⁰⁸⁶ As discussed in the previous chapter.

	admiration towards the LNM-PRM ²⁰⁸⁷ .	
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- *Acts of courage/self-sacrifice/integrity/prototypicality in marked contrast to traditional elites/rival movements:*

Pan-Arab Nationalism:	Marxism:	Islamism:
<ul style="list-style-type: none"> • N/A. 	<ul style="list-style-type: none"> • In their courageous championing of the domestic movement and protection of the PRM against LAF and Maronite militia attacks – all in the face of zu‘amā’ passivity or complicity - the factions of the Marxist tendency burnished themselves with unrivalled prototypical, courageous and heroic credentials²⁰⁸⁸. 	<ul style="list-style-type: none"> • N/A.

10.4. Ideological competition 4: the post-LNM-PRM civil war period (1982-1986):

Here the Islamist tendency popularised in an ideological vacuum. Nevertheless it exhibited the same strengths as had aided winners of previous ideological competitions.

10.4.1. Facilitating factors:

²⁰⁸⁷ Ibid.

²⁰⁸⁸ Ibid.

- *Relevant diagnostic frames:* Tawhid's ideology was vague and undeveloped, with different cadres postulating doctrines as diffuse as Salafism, Khomeinism, and Qutbism²⁰⁸⁹. Overall, its public ideological face was one of populism wrapped in a discourse of Sunni solidarity against sectarian threats (notably the Alawite Syrian regime and its local Tripolitanian Alawite allies) and secular Muslim Marxist factions²⁰⁹⁰. Tawhid does seem, however, to have provided a compelling, organic, redemptive, and enclavist narrative for Tripoli's Sunnis undergoing an ideological and leadership vacuum in the wake of collapsed, imported, secular ideologies, continuing zu'amā' alienation, and enemies on all sides – both sectarian and secular²⁰⁹¹.
- *Elite support (sincere of rhetorical), or credible means of subverting elite influence:* Tawhid did not enjoy the support of the Sunni zu'amā', who were mostly collaborating with Tawhid's main enemy, the Syrian regime²⁰⁹². However, Tawhid was able to subvert the zu'amā's patrimonial hold over the Sunni-menu people – and ween the Qabadayat off dependence upon their support and protection – thanks to the vast resources made available to the group by their allies, the PRM and revolutionary Iran²⁰⁹³, the former of whom they cooperated with on the battlefield, and who left Tawhid stocks of weaponry and equipment upon the PRM's ejection from Lebanon in 1982²⁰⁹⁴, while exploiting the attendant collapse/straining of Sunni zu'amā' patronage networks due to the war's disruption²⁰⁹⁵.
- *Strong leadership:* Tawhid benefited from charismatic and prototypical leadership. Sha'ban himself was charismatic and prototypical, railing against the Syrian occupying forces despite the personal risks²⁰⁹⁶. Additionally, prior to his defection from the group, Tawhid benefited from the involvement of Khalil Akkawi, a renowned Tripolitanian Qabaday much loved by the

²⁰⁸⁹ Mneimneh, "The Islamization," 60; Rabil, *Salafism in Lebanon*, 9, 74-75; Gade, "Return to Tripoli," 33;

²⁰⁹⁰ Gade, "Return to Tripoli," 33.

²⁰⁹¹ Ibid, 33 & 46.

²⁰⁹² Gade, "Sunni Islamists," 35.

²⁰⁹³ Revolutionary Iran saw in Sha'ban an amenable conduit through which to export its Islamic revolution to Lebanon's Sunnis (Gade, "Return to Tripoli," 33).

²⁰⁹⁴ Mneimneh, "The Islamization," 60; Gade, "Sunni Islamists," 42; Gade, "Return to Tripoli," 33 & 43.

²⁰⁹⁵ Abu Khalil, "Druze, Sunni and Shiite," 36; Tine Gade, "The reconfiguration," 143.

²⁰⁹⁶ Gade, "Return to Tripoli," 41.

population for his long pedigree of 'social banditry' against zu'amā' exploitation, high intelligence, and ascetic lifestyle²⁰⁹⁷.

- *Sufficient resources (access to arms, means of dissemination, organisation, etc.):* As noted, Tawhid inherited vast stocks of weaponry from its outgoing PRM ally, while incorporating three of Tripoli's most consequential militias. This enabled it to militarily impose itself over the remaining Marxist factions and defend its new fiefdom from Syrian and Lebanese-Allawite attacks. Additionally, Sha'ban was able to disseminate his ideological views – and coordinate action – from his position as Imam at the popular al-Tawba Mosque, which drew crowds of thousands at the time of Tawhid's establishment²⁰⁹⁸.
- *Clear precedents for success (prognostic or strategic):* Sha'ban, Tawhid's cadres, and the broader diffuse Islamist tendency that proliferated across Sunni Lebanon following the collapse of the Marxist tendency, all drew inspiration from the 1979 *Islamic Revolution* in Iran²⁰⁹⁹, which demonstrated for the first time the vitality and utopian potential of political Islam. They also drew inspiration from the near-coterminous *Muslim Brotherhood* revolt in Syria which, while eventually crushed by the overwhelming military might of the regime, nonetheless demonstrated the vitality of Islam as a mobilising identity²¹⁰⁰.
- *De-intellectualising personalities and events (charismatic leaders, martyrs, glamorous 'poster-boys', heroic episodes, etc.):* The Islamist tendency was granted its first real martyrs and heroes by the Syrian Muslim Brotherhood revolt (1976-1982), many fugitives from which settled in Tripoli in 1982 where they forged bonds of comradeship with a Sunni population also chaffing under the Syrian regime. The fugitives (and the martyrs they left behind) gave a heroic and activist face to what had previously been an essentially intellectual

²⁰⁹⁷ Gade, "The reconfiguration," 154; Tine Gade, "Together all the way? Abeyance and co-optation of Sunni networks in Lebanon," *Social Movement Studies* 18(1) (2019), 62.

²⁰⁹⁸ Abi Samra, "Revenge of the Wretched," 223.

²⁰⁹⁹ Sing, "Brothers in Arms," 6-7, 43; Pall, *Salafism in Lebanon*, 69; Rabil, *Salafism in Lebanon*, 9.

²¹⁰⁰ Moreover, Syrian MB fugitives sought refuge in Tripoli, where they were warmly received, and many joined Tawhid. They wove a compelling ideological narrative that depicted the sufferings of Syrian and Lebanese Sunnis under the al-Assad regime as one and the same struggle, defined by sectarian predations. See: Gade, "Sunni Islamists," 44; Tine Gade, "Limiting violent spillover," 5; Gambill, "Islamist Groups," 44; International Crisis Group, "A Precarious Balancing Act: Lebanon and the Syrian conflict," *ICG Middle East Report* 132 (Nov., 2012), 3; Hanf, *Coexistence*, 306.

movement. Likewise, the successful Iranian Revolution helped transform intellectual debates on political Islam into a popular, utopian emancipatory project capable of catching the imagination of the oppressed and destitute²¹⁰¹.

- *Endorsement by communal actors with high social capital:* Tawhid did not receive any endorsements from high capital actors. Nevertheless, as noted below, it was operating in a vacuum of such actors.

10.4.2. Inhibiting factors:

- *Ideological/movement market is 'saturated':* Tawhid entered a marketplace vacant rather than saturated – the traditional zu‘amā’ discredited, the Syrian occupation forces despised, and the LNM-PRM discredited, fragmented, and increasingly decimated²¹⁰² - enabling it to step into a vacuum as the only player ideologically and physically intact to take over leadership of Tripoli’s Sunni menu people.
- *Ideology is too intellectual/abstract:* As noted, Sha‘ban managed to transform the Islamist tendency into a populist identity project, a first for Sunni-Lebanese militants.
- *Ideology’s concepts or mobilising identities are alien or suspect:* Upon Tawhid’s conception, the old stigmas against Islamism – chiefly based on its association with Wahhabi Bedouin raiders – had not been rehabilitated in any significant way. Nevertheless, the memories of those raiders had broadly faded, with the ideological consciousness of the menu people far more concerned with finding a replacement – perhaps any replacement – for the failed Pan-Arab Nationalist and Marxist tendencies.
- *Movement is repressed/decapitated prior to gaining a substantial public profile:* By the time Tawhid became subject to repression (at the hands of the Syrian occupying forces), it was already militarily well-established, enabling it to resist effectively and garner heroic, prototypical credentials for its leadership and ideological vision in the process²¹⁰³.
- *Condemnation from actors high on social capital:* As noted, Tawhid emerged in a social vacuum, with previously-high capital actors (e.g., the zu‘amā’,

²¹⁰¹ As noted above.

²¹⁰² As noted in the previous section.

²¹⁰³ Tawhid’s Emirate surviving three years of siege before finally being crushed by overwhelming numbers - Gade, “Sunni Islamists,” 42.

mainstream 'ulema, and the LNM-PRM) all having suffered substantial losses to their social capital by this stage.

10.4.3. Inhibiting factor neutralisers:

- *Gap appears in the ideological/movement market:* As noted, Tawhid was able to exploit a newly vacant marketplace thanks to the collapse and discrediting of the LNM-PRM Marxist tendency, enabling it to portray itself as the sole actor capable of protecting, and bestowing social justice upon, Tripoli's Sunni-Lebanese menu people.
- *Ideology's concepts or mobilising identities naturalised/rehabilitated:* As noted, the old stigmas against Islamism had faded into distant memory by this time and, while no concerted processes had succeeded so far in naturalising Islamism as an ideological framework or basis of identity for Lebanese Sunnis, the image of Islamists had been somewhat rehabilitated by the Iranian Revolution's toppling of a Imperialist-backed regime, and the Syrian Muslim Brotherhood's resistance against the hated shared Syrian regime enemy.
- *Reduction of repression endured:* (N/A).
- *Loss of social capital among condemnatory actors:* (See above).

10.4.4. Spoiling factors:

- *Alienating decisions and behaviours:* Available evidence suggests Tawhid left a mixed impression on Tripoli's Sunnis, which itself suggest that at least some were deeply alienated by its behaviour. In particular, the movement has been criticised for its brutality (particularly its murder of 28 CPL members on charges of atheism – an atrocity that provoked the defection of leading Tawhid Qabadays Khalil Akkawi and Naji Murad)²¹⁰⁴, alongside its coercive imposition of its draconian and alien interpretation of shari`a law upon the population²¹⁰⁵.

10.4.5. Scoring factors:

- *Redemption/renunciation of past alienating decisions and behaviours:* (N/A).

²¹⁰⁴ Rougier, *The Sunni Tragedy*, 11.

²¹⁰⁵ Rabil, *Salafism in Lebanon*, 77; "The conflict context in Tripoli: Chronic neglect, increased poverty, & leadership crisis," *Lebanon Support*, Conflict Analysis Report (September 2016). Available at: https://civilsociety-centre.org/sites/default/files/resources/ls-car-nov2016-tripoli_0.pdf, 27; Pall, *Salafism in Lebanon*, 69; Gade, "Together all the way," 63; Gade, "Return to Tripoli," 45.

- *Enduring repression after gaining a substantial public profile:* Tawhid's Emirate came under sustained attack by the Syrian occupying forces, in conjunction with local Allawite and cross-confessional Marxist factions²¹⁰⁶. Despite its mixed legacy, Tawhid's dogged if unsuccessful resistance against these threats garnered it heroic credentials in local memory as a defender of the community²¹⁰⁷. Even while Sha'ban was later shunned for allowing himself to be co-opted by the Syrians²¹⁰⁸, many lower-level Tawhid members were murdered or imprisoned by the Syrians and their allies, earning them martyrs' credentials as defenders of the Sunni population against its enemies²¹⁰⁹. It is less clear, however, if they were remembered as Islamists, or simply as heroic local men defending their community, regardless of their ideological affinities.
- *Acts of courage/self-sacrifice/integrity/prototypicality in marked contrast to traditional elites/rival movements:* As above, Tawhid's defence of its Emirate earned it heroic credentials as stalwart and prototypical defenders of the local community. However, once again, it is unclear the extent to which this reflected their Islamist ideological affinities, or simply their role as local men defending their community.

10.5. Ideological competition 5: the *Sunni insurrections* (2012-2014):

Again, the Islamist tendency popularised in an ideological vacuum. Nevertheless, it exhibited the same strengths as had aided winners of previous ideological competitions:

10.5.1. Facilitating factors:

- *Relevant diagnostic frames:* Salafism's simplistic religious diagnostic and prognostic frames provided an accessible and compelling critique and remedy for a community exasperated by the weakness and self-servitude for their secular mainstream leaders, while its sectarian conspiracy theories painted a visceral and morally unambiguous picture of friend and foe.
- *Elite support (sincere or rhetorical), or credible means of subverting elite influence:* In the post-2005 period, the mainstream Sunni leadership routinely

²¹⁰⁶ Notably the CPL, SSNP, Allawite militias, and others. See: Gade, "Sunni Islamists," 42.

²¹⁰⁷ Gade, "Return to Tripoli," 33 & 45.

²¹⁰⁸ Gade, "Sunni Islamists," 42; Gade, "Return to Tripoli," 47

²¹⁰⁹ Ibid.

lent tacit credibility to the Salafis by tapping into their sectarian rhetoric as a means of leveraging populist appeals to their constituents against Shi‘a Hezbollah²¹¹⁰, and they often provided platforms to Salafis to further this populist discourse, magnifying Salafi ideology (and personalities) in the process²¹¹¹. More concretely, the Salafis were able to subvert the zu‘amā’s patronage networks through their own formidable and heavily-funded charity networks²¹¹², a form of soft power that also enabled them to draw the Qabadayat away from their traditional dependence on the zu‘amā²¹¹³.

- *Strong leadership*: The Salafi movement benefited from charismatic, courageous, self-sacrificing (and thus prototypical)²¹¹⁴, well-resourced and platformed, but highly diffuse leadership²¹¹⁵. This has afforded them significant mobilisatory power over their local constituents but has prevented them from uniting Lebanese Sunnis across the country under a single organisation²¹¹⁶, as Hezbollah had done for the Shi‘as. Thus, Sunni militant Salafism has succeeded only in enclavist, defensive and reactive actions, rather than proactive, offensive ones.
- *Sufficient resources (access to arms, means of dissemination, organisation, etc.)*: The Lebanon’s Haraki-Salafi and Salafi-jihadist factions have acquired substantial stocks of weapons from multiple avenues:
 - Stocks left over from the civil-war, in which society was heavily militarised.

²¹¹⁰ Rabil, *Salafism in Lebanon*, 205, 348; Rougier, *The Sunni Tragedy*, 74; Knudsen, “Sunnism,” 11; Gambill, “Islamist Groups,” 50.

²¹¹¹ Knudsen, “Sunnism,” 13; Rougier, *The Sunni Tragedy*, 74; Bassel F. Salloukh, “The architecture of sectarianization in Lebanon,” in *Sectarianization: mapping the new politics of the Middle East*, eds. Nader Hashemi and Danny Postel (London: C. Hurst & Co. (Publishers), 2017), 228; Genieve Abdo, *The New Sectarianism: the Arab Uprisings and the rebirth of the Sunni-Shi‘a divide* (Oxford: Oxford University Press, 2017), 107.

²¹¹² This ability has only increased since 2008 when Saudi Arabia reduced their patronage of al-Mustaqbal, reducing the mainstream Sunni leadership’s ability to fulfil its end of the VSC, and allowing the Salafis – quietist and activist – with their formidable Saudi and Kuwaiti, and Qatari, sponsors, respectively – to take up the slack. See: Rougier, *The Sunni Tragedy*, 220; Lefèvre, *The roots*, 7; Gade, “The reconfiguration,” 161; Pall, *Lebanese Salafis*, 32; Rabil, *Salafism in Lebanon*, 5, 82-83, 240.

²¹¹³ Discussed in detail in Lefèvre, *The sociopolitical undercurrent*.

²¹¹⁴ Many of whom have burnished their prototypicality not just in Lebanon but in forays fighting for the SAOM as well. See: Pall, *Lebanese Salafis*, 42; Rougier, *The Sunni Tragedy*, 194; Pall, “Kuwaiti Salafism”; Zelin, “Jihadism,” 53; Hemish, “Can Islamic State win”.

²¹¹⁵ Pall, *Lebanese Salafis*, 62-64; Saouli, “Lebanon’s Salafis,” 49; Knudsen, “Sunnism,” 6.

²¹¹⁶ Ibid.

- Syrian intelligence and other foreign agencies equipping Salafi-jihadist outfits for fighting US-led forces in Iraq²¹¹⁷.
- Al-Mustaqbal began arming Haraki-Salafis in the post-2005 period as a means of creating a Sunni foil to Hezbollah²¹¹⁸. It is alleged that they have also contributed to arming some of the salafi-jihadist groups resident in Lebanon's Palestinian refugee camps for the same purpose²¹¹⁹.
- The vast funds available to Salafi networks have aided their ability to acquire arms through black market channels.

Haraki-Salafis have also been afforded ample means for disseminating their ideological narratives: firstly through their running of significant numbers of Sunni mosques (some of which attract thousands of supplicants)²¹²⁰ and, secondly, through their frequent platforming by mainstream Sunni personalities, who have routinely invited them to speak on zu'amā'/al-Mustaqbal-run TV channels as a means of whipping up populist Sunni-solidarity against Hezbollah²¹²¹.

- *Clear precedents for success (prognostic or strategic)*: Militant Islamist movements have been given credibility by the vitality firstly of Hezbollah²¹²² and, since 2012, by military successes of Islamist factions of the SAOM – most notably AaS, JaN and IS – vis-à-vis their secular FSA brethren. Available evidence suggests that all of these actors have played significant roles in increasingly faith in, and enthusiasm towards, Lebanon's Haraki-Salafi and Salafi-jihadist tendencies²¹²³.

²¹¹⁷ Lister, *The Syrian Jihad*, chapter 1; Rabil, *Salafism*, 169-171; Hassan Rabih, "The Beirut Bombings and the Islamic State's Threat to Lebanon," *CTC Sentinel* 8(11) (Nov./Dec., 2015), 37; Gade, "Sunni Islamists," 51.

²¹¹⁸ As well as al-Mustaqbal launching a concerted effort to arm Salafis as a countermeasure to Hezbollah, various Sunni zu'amā' have funded and armed groups of Salafis to act as their personal bodyguards and enforcers – à la traditional qabadyat. See: Rosen, *Aftermath*, 398-399; Rougier, *The Sunni Tragedy*, 66, 84; Knudsen, "Sunnism," 11; Luca, "Sectarian Conflict," 90.

²¹¹⁹ Rosen, *Aftermath*, 199, 205-206; Rabil, *Salafism in Lebanon*, 220.

²¹²⁰ Knudsen, "Sunnism," 13; Pall, "Kuwaiti Salafism,,"; Alexander Corbell, "The Syrian Conflict and Sunni Radicalisation in Lebanon," *Sada*, dated January 9 2014. Accessed December 4 2015. Available at: <https://carnegieendowment.org/sada/54132>

²¹²¹ See footnote 2294 above.

²¹²² Luca, "Sectarian Conflict," 89-91; Rosen, *Aftermath*, 387.

²¹²³ Rougier, *The Sunni Tragedy*, 225; Daher, "In the Wake of the Islamic State," 210; Gade, "Limiting violent spillover," 12; Hilal Khashan, "Dateline: Why Lebanon's Sunnis support ISIS," *Middle East Quarterly*, dated Summer 2015. Accessed October 9 2016. Available at: <https://www.meforum.org/5316/lebanon-sunnis-isis>, 2.

- *De-intellectualising personalities and events (charismatic leaders, martyrs, glamorous ‘poster-boys’, heroic episodes, etc.):* The Haraki-Salafi and Salafi-jihadist tendencies have both benefited, since the eruption of the Syrian conflict, from a steady crop of heroes and martyrs, both Syrian co-religionists and Lebanese volunteering to aid them. On top of this, the *Sunni Insurrections* themselves have burnished the movement(s) with heroes and martyrs, remodelling the traditionally celebrated social banditry of the Qabadayat in an Islamist garb, as they defend their communities from the predations and indignities inflicted upon them by Hezbollah and an allegedly Hezbollah-infiltrated LAF²¹²⁴. Meanwhile, the Haraki movement has produced a slew of charismatic Sheikhs, who have come to embody the movement through their denunciations of Hezbollah, the Syrian regime, and al-Mustaqbal’s failures, weaknesses and alleged betrayals, their campaigning for Sunni rights (including for the release of those detained for Islamist activism and/or violence), and their championing of the Syrian revolution and Syrian refugees – all in contrast to the passive and capricious mainstream Sunni leadership²¹²⁵.
- *Endorsement by communal actors with high social capital:* As noted, mainstream Sunni politicians have routinely offered tacit endorsement to Haraki-Salafis as a means of whipping up populist Sunni solidarity against Hezbollah.

10.5.2. Inhibiting factors:

- *Ideological/movement market is ‘saturated’:* On the contrary, as noted, the Islamist tendency has risen in an ideological vacuum.
- *Ideology is too intellectual/abstract:* Thanks to its charismatic leading Sheikhs and Qabadayat, the movement has grown increasingly populist, offering simplistic but compelling ideological narratives through which the Sunni-Lebanese menu people might interpret and seek to remedy their predicaments.

²¹²⁴ Lefèvre, *The sociopolitical undercurrent*.

²¹²⁵ This is attested at length in: Rougier, *The Sunni Tragedy*, 170-172, 174-175, 181-182, 194, 206, 212, 220; Luca, “Sectarian Conflict,” 50, 106; Pall, *Lebanese Salafis*, 42; Rabil, *Salafism in Lebanon*, 11-12, 218-219, 222, 226, 230; Knudsen, “Sunnism,” 13; Alexander Corbell, “Securing Lebanon, widening divides,” *Sada*, dated July 31 2014. Accessed December 4 2014. Available at: <https://carnegieendowment.org/sada/?fa=56303>; Pall, “Kuwaiti Salafism”; Gade, “Limiting violent spillover,” 10; Gade, “Lebanon,” 8; Nir, “The Sunni-Shi’a balance,” 68.

- *Ideology's concepts or mobilising identities are alien or suspect*: Islamism acquired a stigma among many Sunni-Lebanese menu people in the post-civil war period for four main reasons: 1) the brutish and draconian behaviour of Tawhid during the war²¹²⁶; 2) the association of Salafi-jihadism with Palestinian refugee camp populations, who had become commonly stigmatised as destabilising forces among Lebanese Sunnis since the civil war²¹²⁷; and 3) the belief, perpetuated by the mainstream Sunni leadership, that those refugee camp-based Salafi-Jihadist factions were creations of Syria designed to destabilise Lebanon²¹²⁸. However, as noted below, these stigmas would be rehabilitated in large measure by the time of the *Sunni Insurrections*.
- *Movement is repressed/decapitated prior to gaining a substantial public profile*: (N/A).
- *Condemnation from actors high on social capital*: Much like Tawhid before it, the Salafi tendency has thrived in a social capital vacuum – see below.

10.5.3. Inhibiting factor neutralisers:

- *Gap appears in the ideological/movement market*: As noted, the Salafi tendency has operated in an ideological vacuum, its only competitors being rival Islamist groups who disqualified themselves from any anti-establishment credentials on account of their support for the Sunni-Lebanese menu people's main perceived enemies – Hezbollah and the Syrian regime.
- *Ideology's concepts or mobilising identities naturalised/rehabilitated*: Salafi-jihadism has been rehabilitated for some members of the Sunni-Lebanese menu people as a result of their role in the SAOM, which enabled them to remodel themselves as popular liberation forces²¹²⁹. More broadly, the Islamist tendency – for so long alien and suspect in Lebanon – has been gradually naturalised since the end of the civil war as Haraki-Salafis and Purist-Salafis have positively integrated themselves into the daily lives of Lebanese Sunnis through their expansive charitable enterprises and trusted arbitration, employment, and other social services, completely transforming

²¹²⁶ As noted above.

²¹²⁷ Rosen, *Aftermath*, 210, 213; 388.

²¹²⁸ Ibid, 214; Rougier, *The Sunni Tragedy*, 83; Saab, "al-Qa'ida's presence," 5.

²¹²⁹ As discussed at length in chapters 2 and 3. For a quick reference, see: Peter Harling, "The reinvention of jihadism in the Middle East," *Turkish Policy Quarterly* 15(1) (Spring, 2016): pp. 41-48.

their image²¹³⁰. Additionally, Sufism –so antagonistic to iconoclastic brands of Islamism such as Salafism - had lost much of its popularity by this period²¹³¹.

- *Reduction of repression endured:* While the Haraki-Salafi trend endured sporadic repression at the hands of the Syrian occupation forces between 1990-2005 (see below), that was lifted upon the Syrian withdrawal in 2005. This gave those Salafis a new lease on life, greater freedom of action and improved platforms of dissemination, and anti-Syrian martyr credentials, all while enabling many exiled figures – notably Haraki-leader Da'i al-Islam al-Shahhal – to return²¹³².
- *Loss of social capital among condemnatory actors:* While the zu' amā' has generally attempted to leverage the Haraki-Salafis for their own populist designs, the only actors to speak out against the movement have suffered a considerable loss of social capital. Firstly, the traditional Sunni religious establishment – Dar al-Fatwa – has both lost many of its organic links with the menu people (due to its loss of control over many of the country's mosques) and has also suffered a significant loss of credibility due to its lack of funding, alleged corruption scandals, alleged subservience to the zu' amā', and alleged conciliatory attitude towards Hezbollah²¹³³. Similarly, the Purist-Salafi trend has provoked outrage through its conciliatory overtures towards Hezbollah and failure to stand up for the Sunni-Lebanese menu people against the group in any meaningful way²¹³⁴.

²¹³⁰ As already noted. Particularly well-articulated throughout Pall, *Lebanese Salafis*.

²¹³¹ Habibis describes Lebanese Sufism by 1992 as “an anachronism catering for marginal sections of society” (Daphne Habibis, “Change and Continuity: A Sufi Order in Contemporary Lebanon”, *Social Analysis: The International Journal of Social and Cultural Practice* 31 (July 1992), 46). That said, Sufism does appear to retain a non-institutional folk-legacy among many Lebanese Sunnis, and accommodation to Salafism appears to have had much also to do with the pragmatic willingness of Lebanese Salafis to temper their usual iconoclasm in order to ingratiate themselves. See: Lefèvre, *The Sociopolitical Undercurrent*.

²¹³² Lebanon's haraki Salafis have endured/enjoyed a capricious environment. When it suited them, Syria afforded them free reign as a means of dividing Sunni-Lebanon's political and Islamist currents. However, the movement suffered two waves of blanket and brutal repression following the assassination by Palestinian jihadists of a Syrian ally in 1996, and following clashes between Salafi-jihadists and the LAF in 2000. After Syria's ejection, al-Mustaqbal enacted an amnesty that freed and allowed the return of exiled Harakis, and formed a working alliance-of-convenience with them as a means of solidifying Sunni solidarity and cohesion. They have suffered instances of repression in response to Islamist violence in 2007 and as a result of the Sunni insurrections, however, though never to the blanketing levels of the Pax-Syriana period. See: Pall, *Lebanese Salafis*, 45-52; Rabil, *Salafism in Lebanon*, 10; Rougier, *The Sunni Tragedy*, 54-59; Gade, “Sunni Islamists,” 52; Abdel-Latif, “Trends in Salafism,” 81.

²¹³³ Lefèvre, *The Roots*, 10; Pall, *Lebanese Salafis*, 32; Pall, “Kuwaiti Salafism,”; Rabil, *Salafism in Lebanon*, 239.

²¹³⁴ Pall, *Lebanese Salafis*, 60-61; Rabil, *Salafism in Lebanon*, 5-6.

10.5.4. Spoiling factors:

- *Alienating decisions and behaviours:* As noted, previous spoiling behaviours, such as the brutishness of Tawhid or excesses of AQI – have been redeemed by the celebrated behaviour of the Haraki-Salafis and the rehabilitation and re-invention of the Salafi-jihadist movement in light of the Syrian conflict.

10.5.5. Scoring factors:

- *Redemption/renunciation of past alienating decisions and behaviours:* (As above).
- *Enduring repression after gaining a substantial public profile:* The Haraki-Salafi trend has suffered repeated rounds of repression, notably:
 - 1) The 1996 banning of Da'i al-Islam's al-Shahhal's charitable institution on the pretence that it was spreading sectarian attitudes²¹³⁵.
 - 2) The 2000 dissolution of Da'i al-Islam al-Shahhal's second charitable institution on pretence of his alleged links with Salafi-jihadist groups *Takfir wa al-Hijra*²¹³⁶.
 - 3) The 2007 mass arrest of Lebanese Salafis following clashes between the LAF and Palestinian Salafi-jihadist group *Fatah al-Islam*²¹³⁷.
 - 4) The allegedly arbitrary imprisoning of Haraki-Salafi personalities and sympathisers by the LAF and ISF during the time of the *Sunni Insurrections*²¹³⁸.

All such cases occurred after it had established itself as a valued actor in Sunni-Lebanese society – enabling it to portray its repression as an injustice or even conspiracy (typically by an Allawite Syrian occupation force or, later, by an allegedly Hezbollah-controlled LAF)²¹³⁹, while enflaming the resentment of the Sunni-Lebanese menu people towards the repressing agencies, who are seen to be depriving them of the patronage they have come to rely upon. Each time, the Haraki-Salafis have emerged with greater prototypicality due

²¹³⁵ Gambill, "Islamist groups," 46; Pall, *Lebanese Salafis*, 48-52; Abdel-Latif, "Trends in Salafism," 81.

²¹³⁶ Gade, "Sunni Islamists," 49; Rabil, *Salafism in Lebanon*, 168.

²¹³⁷ Rosen, *Aftermath*, 204; Luca, "Sectarian Conflict," 50.

²¹³⁸ Luca, "Sectarian Conflict," 78, 80-81, 103.

²¹³⁹ Rosen, *Aftermath*, 427; Rougier, *The Sunni Tragedy*, 170; Siegrist, "Lebanon," 16; Van Veen, "Elites, power and security," 17.

to the greater personal risks they endure to stand up for the rights of the Sunni-Lebanese menu people.

- *Acts of courage/self-sacrifice/integrity/prototypicality in marked contrast to traditional elites/rival movements:* As noted, Haraki-Salafis have assumed great personal risks in standing up for the Sunni-Lebanese menu people, in marked contrast to the apparent passivity – and often alleged betrayals – of the mainstream Sunni leadership.

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