Spirituality or Savagery? How the term jihad has been manipulated by political actors throughout Islamic history

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Spirituality or Savagery? How the term *jihad* has been manipulated by political actors throughout Islamic history

A thesis submitted in partial fulfillment of the requirement for the degree of Bachelors of Arts in Global Studies from The College of William and Mary

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April 24, 2009
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Since the attacks of September 11, 2001, the debate over the “true” meaning of the Islamic concept of *jihad* has been contentiously argued in American society, media, and government. Although most Americans had probably never heard of, much less thought about the meaning of the Arabic term *jihad* before the September 11 attacks, the word – and its connection to militant Islamist terrorism – rapidly became the subject of intense controversy and discussion among not only scholars and academics, but ordinary Americans as well. What did *jihad* mean? Was it the Islamic equivalent of “holy war”? Or was it simply an “internal spiritual struggle”? Were modern-day terrorists manipulating an ancient religious idea for their own ends, or was militancy inherent in Islam? In an effort to address these difficult questions, diverse theories, explanations, and conclusions have arisen.

Those seeking to explain the meaning of *jihad* – especially in the media – have tended to fall into two diametrically opposed camps, both of which provide inaccurate portrayals of what *jihad* has historically meant. The first, advocated by many experts sympathetic to Islam and concerned about the rise of anti-Islamic sentiment in America and Europe after September 11, holds that *jihad* is not a militant concept but rather nothing more than an internal, spiritual struggle to control one’s own selfish passions and desires. Many media reports in the months after September 11 included this explanation. Dr. Zaki Badawi, principal of The Muslim College in west London, offered that “Jihad has become an abused term. It does not mean holy war. It means the struggle to do

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good...[like] doing your job properly or controlling your anger or appetite.”

A front-page article in the Christian Science Monitor in October 2001 announced that jihad meant an “internal struggle’ for a just cause,” which was being “co-opted by extremists.”

Farish Noor, a Malaysian scholar, told the Straits Times of Singapore that “Jihad...referred originally to a personal existential struggle against one’s own moral failings, like pride, fear, anxiety, and prejudice.”

In the U.S., similar sentiments were echoed by Sarah Eltantawi of the Muslim Public Affairs Council, who told Greta Van Susteren of Fox News that jihad “means an internal struggle...that’s the classical definition of jihad. I can refer you to several books that highlight the classical definition of jihad as being an internal struggle for self-good.”

On the other side, many commentators have promoted the theory that militant jihad as articulated by Osama bin Laden is actually part of Islam, and thus that Islam is an inherently violent religion. “We are at war with Islam,” Sam Harris wrote in the Washington Times. “The only reason Muslim fundamentalism is a threat to us is because the fundamentals of Islam are a threat to us.”

Lawrence Auster, a contributor to FrontPageMagazine.com, blasted the Middle East scholar Daniel Pipes for suggesting that the promotion of “moderate Islam” is the solution to today’s militancy in the Islamic world. In Auster’s view, “The problem is not ‘radical’ Islam but Islam itself.”

Robert Spencer, a well-known and outspoken critic of Islam, wrote in the Politically Incorrect

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4 Kwok Kian Woon, “Battle Lines; The Words of the War,” The Straits Times (Singapore), December 31, 2001, p. 1, 4-5.
5 On The Record With Greta Van Susteren, Fox News Channel, February 13, 2002.
Guide to Islam that “there is no mistaking the centrality of violent jihad in Islam.”

Rather than having been a purely spiritual idea co-opted by extremists, Spencer argued that “the unpleasant fact is that violent jihad warfare against unbelievers is not a heretical doctrine held by a tiny minority of extremists but a constant element of mainstream Islamic theology.”

Andrew C. McCarthy, the former New York prosecutor who put Omar ‘Abd al-Rahman in prison for life for his role in the 1993 World Trade Center bombings, told National Review that “the forcible tendencies of fundamentalist Islam may be exacerbated or rationalized by poverty, resentment, lack of democracy, etc. But they are not caused by such pretexts. The violence is commanded by scripture.”

Many newspaper columnists echoed the sentiments of Washington Times columnist Diana West, who wrote that “what we know as ‘terrorism’ is directly linked to the centrality of jihad (holy war)…in Islam,” and wondered about the possibility that “the violent and hateful ideology runs through Islam itself[.]”

Strangely, these commentators’ conclusions align closely with the views of militant Islamists themselves. Terrorism expert Steven Emerson records that Abdullah Azzam, the mentor of both Omar ‘Abd al-Rahman and Osama Bin Laden, once proclaimed, “The jihad, the fighting, is obligatory on you whenever you can perform it. The word jihad means fighting only, fighting with the sword.”

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9 Spencer, 38.
Yet this controversy is not a new phenomenon. From its origins in the pages of the Qur’an to its usage in the twentieth and twenty-first centuries by radical Islamists as justification for acts of violence, the term *jihad* has long been a subject of controversy and debate, both in the West and within the Muslim world. As Richard Bonney wisely observes, “[D]iscussion and clarification of the term [jihad] are not optional extras, but mandatory for any understanding of the relationship between the Muslim world and the West.”

Which side, then, is correct? The answer, although complex and nuanced, is “neither.” *Jihad*, contrary to the claims of well-meaning experts, has not historically meant simply a spiritual, internal struggle, but has in fact frequently been tied to military and political conflicts from its earliest uses. A closer analysis of the evolution of *jihad* shows that it has been adapted throughout history by political leaders to fit the political circumstances of the time. At the same time, although much of the debate today (and throughout Islamic history) over the “true” meaning of *jihad* revolves around its significance as a theological or religious doctrine, the militant *jihad* advocated by Bin Laden is not “inherent in Islam,” nor does it prove that Islam is a violent religion bent on military conquest. It is more accurate to understand *jihad* as an idea which, although originating in a religious context, has been consistently used primarily as a powerful political and ideological tool by leaders and activists in order to further their own – very worldly – ends.

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PART I: Jihad’s origins in sacred Islamic texts

The word *jihad* comes from the Arabic trilateral root *jiim – ha – daal* (جــهــد), which in its verbal form *jahada* means literally “to strive” or “to struggle.” From its various contexts in the Qur’an, one can see that *jihad* does not refer simply to warfare, but rather more specifically to “disputation and efforts made for the sake of God [fi sabil Allah] and in his cause.”14 However, even combined with references to *jihad* in the *sunna* (tradition) of the Prophet Muhammad, these verses do not constitute a coherent or practicable theological doctrine.

Rather, the evolution of *jihad* as an important Islamic doctrine is long and complex – in fact, it has been the subject of controversy and debate within the Islamic world for most of Islamic history. The concept of *jihad* is founded in the usage of the term in the text of the Qur’an itself. Out of 41 instances of *jihad* or its derivatives in the Qur’an, ten specifically refer to the conduct of war.15 The rest are either clearly pacifistic in intent or open to either interpretation. In addition, there are other Arabic words that may be synonyms for armed *jihad*, such as *qital*, or “fighting,” (Q.2:290-1, Q.9:30, Q.48:22, Q.60:9, Q.3:13, Q.4:74-6), *ribat* (Q.8:60), and *harb* (Q.2:279, Q.9:107, Q.5:33), which is the Arabic word literally meaning “war,” although this term differs from *jihad* in that it encompasses all warfare, whether legitimate (authentic and divinely sanctioned) or illegitimate (undertaken for personal or political gain).

Richard Bonney believes that the development of the doctrine of *jihad* as found in the Qur’an can be broken down into four distinct phases. In the first phase, Muslims were instructed to propagate the message of Islam peacefully, avoiding direct confrontation

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15 Bonner, 22.
with the unbelievers, or in the words of Asma Afsaruddin, “The Muslims were not given permission by the Qur'an to physically retaliate against their persecutors.”\(^{16}\) In the second stage, the believers (mu’minun) were to confront the unbelievers by means of argumentation only, as long as it was done “in good spirit, meaningfully and effectively.”\(^{17}\)

The third phase was the point when Allah gave permission to the Prophet Muhammad and his followers to physically fight their enemies within the divine command. The mu’minun were “enjoined to wage war against those who initiated aggression against Muslims,” and were only allowed to do so after the end of the “sacred/forbidden months,” during which fighting was proscribed. However, three important verses in sura 42 describe the non-militant aspects of “enjoining right and forbidding wrong.”\(^{18}\) Although these verses give permission for self-defense in response to aggression, they also call on Muslims to be “patient in adversity and [forgive], this is indeed the best resolution of affairs.”\(^{19}\)

In the fourth and final phase, the Prophet and his followers were commanded to wage war against the unbelievers until they either submitted to Islam or agreed to live under Muslim rule and pay the jizya, or poll tax.\(^{20}\) These verses permit Muslims to fight those who have waged war against them, even during the “forbidden months,” since “discord and strife (fitna) are worse than killing.”\(^{21}\) The infamous “sword verses” (ayat al-sayf) go even further, instructing Muslims to “slay the polytheists wherever you find

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\(^{17}\) Afsaruddin, 110.

\(^{18}\) Q. 42:40-43.

\(^{19}\) Afsaruddin, 110.


\(^{21}\) 2:217.
them, and take them captive, and besiege them, and lie in wait for them at every conceivable place.” In addition, verse 9:29 instructs Muslims to:

Fight against those who – despite having been given the revelation before – do not believe in God nor in the Last Day, and do not consider forbidden that which God and His messenger have forbidden, and do not follow the religion of the truth, until they pay the jizya with willing hand, having been subdued.

On its face, this Qur'anic injunction seems completely contradictory to earlier commandments for Muslims to only fight in self-defense against an aggressor, and to show “patience” and “forgiveness” to those who wrong them. Indeed, another passage often referenced in conjunction with the “sword verses” is 2:191-193:

Slay them wherever you catch them, and turn them out from where they have turned you out; for persecution is worse than slaughter. Do not fight them at the Sacred Mosque unless they fight you there. If they do fight you, kill them—this is what such disbelievers deserve—but if they cease, God is most forgiving and merciful. Fight them until there is no discord (fitna), and worship is devoted [only] to God. If they cease hostilities, there can be no [further] hostility, except towards aggressors.

How then is one to understand these Qur'anic conceptions of jihad when they seem so incompatible and contradictory to one another? Is there a “correct” directive that should guide Muslims today? To answer this question (as well as explain other apparent inconsistencies found in the Qur’an), Islamic scholars have generally followed one of two schools of thought. The first invokes the doctrine of naskh, or “abrogation.” This hermeneutic was enunciated by several early Islamic jurists during critical periods of warfare and armed conflict for the early Muslim community, and holds that the later verses revealed to the Prophet Muhammad abrogate, or supersede, any earlier verses on the same subject.

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22 9:5.
23 9:29.
In the Qur’an, the doctrine of abrogation becomes somewhat problematic because the *suras*, or chapters, are not arranged chronologically, but rather by length. Many Islamic jurists rely upon a generally agreed-upon chronology of when each *sura* was revealed to Muhammad. Broadly, Qur’anic *suras* can be generally divided into two groups – the earlier chapters revealed to the Prophet during the thirteen years he spent in Mecca, and the later chapters revealed to him during his ten years in Medina.

The theory of abrogation holds that since the two so-called “verses of the sword” (Q.9:36, Q.9:5) are part of *sura At-Tawba* – which was one of the last chapters of the Qur’an to be revealed (in fact it was most likely twenty-seventh out of twenty-eight “Medinan” chapters, and the second-to-last revealed *sura* of the Qur’an) – the directive to wage war unconditionally against the unbelievers “until they submit [to Islam] or pay the *jizya* [poll tax]” is an eternal and immutable divine command for the rest of time, and that these two verses nullify all earlier Qur’anic verses – according to jurists, between 113 and 140 *ayat* – that refer to a more peaceful conception of *jihad*.26

Critics of the doctrine of *naskh* object for several reasons. First, they argue that allowing later verses to abrogate earlier verses prevents a holistic reading of the Qur’an and thereby effectively inhibits a complete understanding of the revealed text. Instead, proponents of this theory – based the pioneering work of 11th century Islamic scholar ‘Ali ibn Ahmad al-Wahidi – argue that when examining Qur’anic verses, one must take into account the *asbab al-nuzul*, the “circumstances of revelation.”27 Afsaruddin notes that many Muslim and non-Muslim scholars tend to “downplay the critical Meccan phase in the development of the Qur’anic doctrine of *jihad,*” but it is “practically impossible to

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26 Bonney, 25.
contextualize the Qur‘anic discourse on the various meanings of *jihad* without taking the Meccan phase into consideration.”

It is only possible to understand the development of a more aggressively militant call to *jihad* in the later Medinan chapters by realizing that it was introduced as a “last resort option…when attempts at negotiations and peaceful proselytization among the Meccans had failed…” Its development – and that of *naskh* – was in fact distinctly political in nature.

*Jihad in the early years of Islam*

As has been observed by Michael Bonner, the instances of *jihad* in the Qur‘an do not by themselves constitute a coherent doctrine. A recognizable and complete theory of *jihad* did not fully develop until another two centuries of Islamic legal reasoning, jurisprudence and scholarship had passed.

The usage of the doctrine of *naskh* to legitimize aggressive, armed *jihad* can be understood when viewing its development within the context of the political circumstances that existed in the Muslim world during the first few centuries of Islam. Islam was a fledgling faith, surrounded by hostile empires and weakened by infighting following the death of the Prophet Muhammad. The early leaders of the Islamic community needed a way to both unify the believers under a single political entity, as well as direct their energies outwards by legitimizing armed conquest against the empires and nations that controlled Mesopotamia, Anatolia, Persia, and North Africa.

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28 Afsaruddin, 111.
29 Afsaruddin, 112.
In the early years of Islam, many scholars devoted themselves to collecting and documenting the oral and transmitted reports about the life of Muhammad and his companions. The first to produce a complete compilation was Ibn Ishaq (d. 767), whose book *al-Sira* (“The Way”) was edited and reproduced by a later scholar, Ibn Hisham (d. 834). The original title of Ibn Ishaq’s work, however, was *Kitab al-maghazi* (the book of campaigns/battles). Another scholar, al-Waqidi (d. 823) wrote a book by the same name which was “devoted entirely to the campaigns and raids of Muhammad’s lifetime.”

These works represented a literary genre in Islam known as *sira* and *maghazi*, which described in detail the life of Muhammad and the history of the early Muslim community. They also contain an outline of the development of how that community came to view warfare and *jihad* – from the nonviolence of the early years in Mecca to the military conquests Muhammad organized from Medina. Ibn Ishaq’s work also contains a description of the Constitution of Medina (*‘ahd al-umma*, or “agreement of the community”). According to Bonner, “the community here is clearly founded more for war than for any other recognizable purpose, even though the text of the Covenant does not name the adversary in this war.”

The *sira* and *maghazi* narratives document the many famous battles of the Prophet’s lifetime, from the Battle of Badr, to the Battle of Uhud, to the truce with the Meccans at al-Hudaybiya. Following his victory over the Quraysh, Muhammad turned his attention northward, directing (and even personally leading) campaigns against the Byzantine frontier fortresses. He “may have been

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30 Bonner, 37.
31 Ibid., 40.
planning for a large-scale campaign against Byzantine Palestine and Syria” when he died in 632.32

One important aspect missing from these narratives is any discussion of contrast between true jihad and “mere” fighting for personal or political gain. There is also little mention of the internal “jihad” against one’s own base desires, what will later be known as the jihad al-akbar, or “the greater jihad.”33

This brings us to the discussion of jihad in the hadith reports. Here lies the origin of much of the intense disagreement and debate over the nature and doctrine of jihad that has plagued the Muslim community for centuries. Many of these reports, compiled over time and by various collectors, are directly contradictory to one another. Bonner explains that “in the hadith we will often find a particular doctrine enunciated in one tradition and then, in another tradition, contradicted outright or in part.” This phenomenon forces readers – including the scholars, exegetes, and judges of Islam – to “choose between conflicting traditions.”34 More often than not, these rulings were influenced by the political necessities of the time in which these scholars lived.

For instance, one central theme in the hadith is the universality of Islam, and the injunction for believers to spread the faith throughout the entire world – including the use of military force to expand the political borders of Islamic rule. One report cites the Prophet as saying, “I have been sent to the human race in its entirety…I have been commanded to fight the people [the unbelievers] until they testify: ‘There is no God by

32 Bonner, 40.
33 Ibid., 45.
34 Ibid., 46.
God, and Muhammad is the Messenger of God.” In the early years of Islam, the universality of the faith was cited as support for the conduct of aggressive *jihad* in the Islamic conquests following the death of the Prophet Muhammad.

Other *hadith* reports concern themselves with defining “correct intention” of those who participate in *jihad* – a clear distinction is made between “mere” fighting and “authentic” *jihad*. The Prophet is asked, “Men may fight out of a desire for booty, or for fame and glory. Who is it that fights in the path of God?” The Prophet responds that “Whoever fights so that the Word of God may be highest is fighting in the path of God.” Therefore, when initiating or directing armed conquest (usually for political or strategic reasons), Islamic rulers made sure to emphasize the legitimacy of the conflict to the community by using the label of *jihad* as a tool to unite the public behind the ruler and the campaign.

**The early Islamic conquests**

Following the death of the Prophet Muhammad in 632, the burgeoning Muslim community found itself with a swelling population and growing power in the Arab world. However, under first caliph, Abu Bakr, the Muslim community was faced with the attempted secession of many tribes who wanted to leave the Muslim *umma* following the death of the Prophet. To prevent this, Abu Bakr launched what is known as the Wars of *Ridda* (apostasy) to defeat these wayward tribes. These wars, however, were not caused by disputes over adherence to Islamic theology or faith, but rather a standard case of political rebellion.

36 Wensinck, 166.
Although some of the tribes did wish to return to their pre-Islamic faiths, most did not renounce Islam – they simply refused to continue paying the zakat, or obligatory alms-giving, to the fledgling central Islamic government in Medina, and announced that their participation in the alliance ended with the death of Muhammad.\(^{37}\) Abu Bakr, realizing the profound danger that could result from a splintering of the political community and the importance of unity in the crucial first years following the death of the Prophet Muhammad, launched the Ridda Wars for starkly political reasons – to consolidate the Medinan government’s political authority over the conglomeration of tribes that spanned the Arabian peninsula.

To justify his actions, Abu Bakr – like so many after him – selected those certain hadith reports which legitimized his arguments for war against the rebellious tribes. He cited reports in which the Prophet had announced that the lives and property of all believers were protected, but with the important exception of illa bi-haqqiha (“except for what is due upon it”), a requirement under which the payment of zakat fell.\(^{38}\) On this basis, Abu Bakr successfully argued for war against the rebellious tribes.

The rebellion was crushed by Abu Bakr’s armies by 634, and he had again unified and consolidated power in Medina. Just as this was occurring, however, groups of Arab Islamic tribesmen were finding success in raids against the weakened Byzantine and Sassanian empires to the north in Syria, Palestine, and Iraq. There is evidence that such fighting “began locally, as raiding expeditions met with unexpected success.”\(^{39}\) Realizing the political need to quickly consolidate these gains and exploit them to the advantage of the new Islamic state, Abu Bakr quickly unified the command of these groups and sent

\(^{37}\) Afsaruddin, 27.
\(^{38}\) Afsaruddin, 28.
\(^{39}\) Bonner, 58.
larger armies to reinforce their efforts, pushing further into Mesopotamia and towards the Mediterranean.

There are three remarks on *jihad* attributed to Abu Bakr: first, he lauded the service of those who fought in the way of God, saying that “every step of the warrior of God merits him seven hundred pious deeds, raises him seven hundred grades and effaces for him seven hundred sins.” However, Abu Bakr also cautioned Muslim warriors to act in strict accordance with the values emphasized by the Prophet: “Do not embezzle, do not cheat, do not break trust, do not mutilate, do not kill a palm or burn it, do not cut down a fruit tree, do not slaughter a goat or cow or camel except for food…”

The second caliph, ‘Umar, continued these conquests, pushing into Iran in the east following the Islamic victory over the Sassanian army at the Battle of al-Qadisiyya, and into Syria with the defeat of the Byzantine army at the Battle of Yarmuk. Jerusalem surrendered to ‘Umar shortly afterwards, and Islamic armies pushed into Egypt and North Africa. The Byzantine Empire, although weakened, still remained – a fact that would shape the development of the doctrine of *jihad* in the future. The fourth caliph, ‘Ali, gave a famous sermon on *jihad*, in which he emphasized the duty of every Muslim to fight in the way of God, saying that “even if you run away from the sword of today you [will] not remain safe from the sword of the next world…Paradise lies under the edge of spears.”

The organization of the Muslim armies at this point was still very much tribal – forces were organized in tribal units, with each tribe dominating in the conquest of different area. In fact, a great point of debate among scholars of this period of Islamic history was whether or not these dramatic conquests were “Arab” or “Islamic.” From the

40 Bonney, 60.
41 Ibid., 66.
42 Bonner, 59.
Islamic point of view, medieval Arabic authors were unanimous in their belief that the early Muslims engaged in conquest because “God has commanded them to do so, and has given them both motivation and opportunity.” They cite verses like Q.33:26-27, which state:

He brought those People of the Book who supported them down from their strongholds and put panic into their hearts. Some of them you [believers] killed and some you took captive. He passed on to you their land, their houses, their possessions, and a land where you had not set foot: God has power over everything.

These early Muslim scholars emphasize that the Muslim fighters were not motivated by greed or fear, but rather inspired by their piety, devotion to God, and desire to spread Islam throughout the world.

The opposing view emphasizes the “Arab” nature of the conquests. Since in the history of the Arabian Peninsula, “scarcity and poverty held sway,” Arab tribes felt compelled to move into the fertile lands of Mesopotamia which had been controlled by the two great empires. They explain the Muslim armies’ successes as due not to the religious zeal of the fighters but instead to the Arabs’ natural fighting skills, honed through centuries of tribal warfare. This explanation was popular among many modern Orientalist scholars in the 19th and early 20th centuries, but as Bonner points out, “The Arabs suffered from scarcity and want, but so too have other peoples who have not then undertaken the conquest of the world.”

The most persuasive explanation, rather, is that the conquests were undertaken primarily for political reasons, specifically the formation of the Muslim state. After asserting its strength in the defeat of the rebels in the *ridda* wars, the Medinan leadership of the Muslim community was looking for a way to further consolidate control over the

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43 Bonner, 61.
44 Ibid., 63.
fledgling state. As groups of Arab fighters were finding success in border skirmishes on the frontiers against the Byzantines and Sassanids, the central leadership in Medina acted in order to “maintain control and make sure of the loyalty of the Arab tribesmen.” As scholar F. M. Donner has noted, the unifying factor of Islam was a key tool in “providing the new state with a secure ideological foundation.”  

45 Richard Bonney agrees, saying that “since Arabia had been largely pacified, it was only by directing raiding and warfare outside Arabia that Medina’s hold over the Arab tribes could be preserved.”  

As Bonner explains, this theory is actually a combination of the “Islamic” and “Arab” arguments for conquest – the Arab Muslims were motivated “at the same time by religious fervor and by hunger, want, and even…greed.”  

47 Indeed, the recorded narratives of these early conquests, known as the futuh, contain very different descriptions of units of fighters – some focus on the spoils of war and plunder, other put emphasis on the acquisition of “religious merit” and having “correct intention” (niyya) when undertaking jihad.  

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**The early Islamic scholars and the debate over the doctrine of jihad**

One of the curiosities of Islamic history is how dramatically the development of the actual theological doctrine of jihad lagged behind the actual performing of jihad. It is important to remember that “the practice [of jihad] preceded the theory,” and that “the jurists provided a post facto rationalization of the Arab conquests, a legal justification for

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46 Bonner, 61.

47 Bonner, 63.

48 Ibid., 65.
the rapid expansion of the Islamic empire that occurred in the decades following the Prophet’s death.”49

During the Umayyad period, the reach of Islam continued to expand as the Muslim community was transformed into what could be described as a “conquest society.”50 In fact, the scholar Khalid Yahya Blankinship has argued that the Umayyad caliphate survived only via perpetual territorial expansion, and in fact “it was the *jihad* that provided the ideological basis to the entire Umayyad enterprise…”51 In this way, *jihad* can be seen during the Umayyad period as an imperial ideology: historian Joseph Schacht proposed that the imperial legislation of the Umayyads eventually served as the basis for the development of much of Islamic law – including the Islamic law of war (*siyar*; also translated as the conduct of international relations). Only later did scholars attribute this law to “more acceptable Islamic sources” such as the Prophet and his companions.52

According to Tamara Sonn, the Umayyads inherited rule over an empire based on an ideology that had no specific theory of governance and a chaotic system of interpreting law. The Umayyads adopted the characteristics of many pre-Islamic systems to fill in the gap, and established a system of judges, or *qadis*. These officials were political appointees charged with not only administrative responsibilities, but also the authority to exercise their own judgments about the application of Islamic principles. Over time, a group of scholars emerged who were regarded as having the most authority

49 Bonney, 63.
50 Bonner, 84.
51 Ibid., 122.
52 Ibid.
to identify and interpret the sources of Islamic law. The four major schools of Sunni Islamic jurisprudence were each named after one of the early jurists.

Several significant splits occurred between the juridical schools in regards to the specifics of the performing of jihad. Malik Ibn Anas (d. 710), the founder and namesake of the Maliki school of jurisprudence, tended to be more cautious and moderate in his opinions on jihad, emphasizing that jihad was only legitimate when applied against those unbelievers who had “been identified politically as the enemies of Islam because of their aggression or hostility.”

However, for the “majority of classical Muslims scholars, particularly of the second century of Islam,” unbelief was “tantamount to injustice (zulm), aggression (‘udwan), and sedition (fitnah).” This view led them to the general assumption that all unbelievers must be the enemies of Muslims, without further investigation as to whether they were or not the actual perpetrators of injustice, aggression, and sedition. The underlying assumptions of the views of al-Shaybani, a preeminent jurist from the Hanafi school, were that “jihad was to be conducted perpetually until there was a complete elimination of religious fitnah, that is polytheism and unbelief.”

The religious justification for conquest and fervor of the Muslim forces produced a dramatic result – by the end of the Umayyad period, Muslim rule stretched all the way across North Africa to the Atlantic and into southern and central Spain (al-Andalus). To the east, Muslim armies had made significant inroads into central Asia and northern India. But it is telling that Islamic history does not favorably review the personal piety of the Umayyad rulers – most were regarded as “impious tyrants” whose Islamic credentials

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54 Bonney, 72.
55 Ibid., 73.
were thin at best.\textsuperscript{56} The Umayyads were unpopular, regarded by their own people as inept and illegitimate, and are considered by Islamic historians to have been opportunistic, only citing Islamic law or principles when it suited their own purposes.

During the Umayyad period, however, the definitions of what \textit{jihad} meant were diverse, with various scholars arguing over its true import due to the “polyvalence of the Qur‘anic term \textit{jihad}.”\textsuperscript{57} The “divergence of opinion” during this period about the nature of \textit{jihad} centered mainly on the differing perspectives of the Hijazi and Syrian jurists. The jurists from the Hijaz, such as Ibn Jurayj (d. 762), placed greater emphasis on \textit{jihad} as a struggle for personal piety, and did not consider it obligatory for all Muslims. Another, Sufyan al-Thawri (d. 778) argued that \textit{jihad} was primarily defensive, and only defensive \textit{jihad} could be considered obligatory on the individual Muslim. However, Syrian jurists such as al-Awza‘i (d. 773) believed that even aggressive war was obligatory upon all Muslims. However, it is important to recognize that “the Syrian Umayyads during this time were engaged in border warfare with the Byzantines and there was a perceived need to justify these hostilities on a theological and legal basis,” while the more pacifist Hijazi jurists were far removed from the bloody frontier fighting.\textsuperscript{58}

It was under the Abbasid caliphate, which arose after the fall of the Umayyads in 750, that the classical doctrine of armed \textit{jihad} began to be formally articulated. Afsaruddin argues that “realpolitik” played a major role in the development of this doctrine, and that the military aspect of striving began to “receive greater emphasis.”\textsuperscript{59}

\begin{footnotes}
\item[56] Afsaruddin, 78.
\item[57] Ibid., 116.
\item[58] Ibid.\item[59] Ibid, 108.
\end{footnotes}
Internal, spiritual aspects of *jihad* were downplayed and the Qur’anic complexity of the term largely overlooked as *jihad* came to be synonymous with *qital*, or “fighting.”

The Abbasid jurists used the doctrine of abrogation (*naskh*), mentioned earlier, to justify this interpretation, trumpeting the “sword verses” and rendering “null and void” the Qur’anic injunctions which permitted truces with unbelievers and peaceful coexistence with Jews and Christians (*ahl al-kitaab*). Scholars such as Abu al-Khattab (d. 735) contended that verses such as Q.8:61 (“incline towards peace”) had been abrogated by the sword verses, and therefore *jihad* was to be “the underlying principle” governing relations between Muslims and non-Muslims. It is important to recognize that Abbasid exegetes like Abu al-Khattab were writing during a time at which the Islamic world was experiencing a persistent string of grave security threats, emanating from both internal revolts and from external powers.

One of the most important developments in the theorization of *jihad* was the classical Islamic jurists’ division of the world into an Abode of Islam (*dar al-islam*) and an Abode of War (*dar al-harb*), first expressed by the famed jurist al-Shafi‘i (d. 820). Although this doctrine has no basis in the Qur’an or *sunna*, framing the world in this stark dichotomy was extremely helpful in legitimizing the conquests of the early caliphs. In this view of the world, the two sides are locked in perpetual conflict with one another. Since the *dar al-harb* is defined as any territory not under the rule of *shari’ah*, in the eyes of the Islamic jurists the states and rulers within the Abode of War “have no legitimacy,

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60 Afsaruddin, 117.
62 Bonney, 74.
and their rule is mere oppression or tyranny." The early jurists concluded that it was permissible to conclude a truce with these rulers and states for up to ten years, based on the precedent of the Prophet in his signing of the Treaty of Hudaybiyya. The existence of peace between Muslim and non-Muslim states prompted some Shafi’i jurists to declare the existence of a third sphere, known as the *dar al-sulh* or *dar al-‘ahd* (the Abode of Truce/Treaty), pertaining to countries with which the Islamic ruler had concluded a truce. Such territories were off-limits to declarations of *jihad*, even though they were not part of *dar al-islam*. This view would eventually gain considerable prominence during the Ottoman era.

Nevertheless, the essentially dualistic nature of this scheme “requires warfare for the defense of lands under Islamic control and encourages the acquisition, through conquest, of new lands.” This does not mean that military *jihad* waged on the basis of this theory aims to convert non-Muslims to Islam by force, since this is explicitly forbidden in Qur’an. Rather, Bonney and Bonner conclude that the construct of *dar al-harb* and *dar al-islam* was created to legitimize the expansion of the political boundaries of Islamic rule under the pretext of defense of the religion.

Indeed, as Afsaruddin observes, the Abbasid caliphate came to control a “vast and diverse political realm [and] had to develop a sophisticated law of nations” (*al-siyar*). From a political perspective, *jihad* to the Abbasid rulers was a tool that could be used to legitimize either offensive or defensive warfare for the sake of state security. The

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64 Bonner, 92.
65 Bonney, 74.
67 Bonner, 92.
68 Afsaruddin, 119.
Abbasid rulers readily accepted these “realpolitik” interpretations, which transformed *jihad* into a military and political tool.

That is not to say that this period in history was without significant debates between scholars. Similarly, while some jurists of this period believed that under certain circumstances Muslims engaging in *jihad* could kill “protected” categories of people (women, children, the disabled, the elderly), important scholars like Ibn Rushd (d. 1198), for example, argued that most jurists were in agreement about the rules of war, including the non-killing of civilian women and children. Ibn Rushd identified the source of contention for this disagreement – the motive for killing the enemy: “Those who think that [they should be killed] because they are unbelievers do not make any exceptions for any polytheist. Others, who are of the opinion that this motive consists in their capacity for fighting, in view of the prohibition to slay female unbelievers, do make an exception for those who are unable to fight or who are not as a rule inclined to fight…” For Ibn Rushd, then, it was the enemy’s capacity to fight against the Muslims that mattered, not the fact that they were unbelievers.  

Ibn Rushd also emphasized an important prerequisite for *jihad* – the prior invitation of the enemy to accept Islam before hostilities begin. However, other scholars such as Shamsuddin al-Sarakhsi (d. 1106) drew upon the example of a battle led by the Prophet Muhammad “to justify pre-emptive hostilities against the enemy without a declaration of war or prior invitation to Islam.” During the siege of Banu al-Mustaliq in 628, the Prophet ordered a pre-emptive attack on the tribe (who were allied to the

69 Bonney, 80.
70 Bonney, 75-76.
Quraysh) after he heard that they had been planning a campaign against the Muslims.71

Al-Sarakhsi also declared that the *imam* was allowed to agree to a treaty on terms which were favorable to the enemy, but also that he was permitted to renounce any such treaty unilaterally once the Muslims had regained strategic or tactical supremacy.72

The jurist Al-Shafi’i was also credited with finding a “solution” to another important early debate about *jihad* – whether it was an “individual” obligation (*fard ‘ala l’ayn*) for each Muslim, or a “collective” duty for the community to undertake as a whole (*fard ‘ala l-kifaya*). Earlier jurists, such as Makhul during the Umayyad period, had argued in favor of *fard ‘ala l’ayn*, mainly because the Umayyad army during that time was in desperate need of more soldiers.73 Al-Shafi’i, however, decided in favor of *fard ‘ala l-kifaya*, saying that the obligation to undertake *jihad* does not fall on every individual, but rather is fulfilled when a “sufficient number” of Muslim volunteers perform it. He did, however, make an exception, in cases of “military emergency” when “the enemy threatens the lands of Islam,” as circumstances when *jihad* did become an individual obligation.74 This interpretation became “widely (though not universally) accepted” and also served a very useful political purpose in that it “provided some resolution to tensions that had been breeding among various contending parties that included the imam/caliph…who needed to mobilize armies so as to defend and…expand the territory of Islam.”75

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72 Bonney, 76.
73 Bonner, 123.
74 Ibid., 107.
75 Ibid., 115.
The Crusades also proved crucial to the development of the doctrine of *jihad*. Saladin, undoubtedly the most famous of all Muslim military commanders, credited with defeating the European crusaders, used the language of *jihad* to rally support for defense of the lands of Islam, or what came to be known as a “counter-crusade.” His predecessor, the commander Nur al-Din, pursued a “puritanical drive towards ‘*jihad* of the sword,’” focusing his attention on Egypt, which was at that time controlled by the Fatimid dynasty. This was not because the Fatimids were Shi’a (though anti-Shi’a language, including a condemnation of “factionalism”, was in fact employed to rally support), but rather because Nur al-Din realized that the capture of Egypt would mean “an immediate and substantial accretion of military and financial resources for the war in Syria” against the Crusaders.\(^7^6\)

Saladin himself made extensive use of *jihad* propaganda in order to drum up support for his military campaigns. Although this language was an attempt to “canalize energy and direct it outwards,” it amounted to little more than “coloured rhetoric in which everything is shown in extremes.”\(^7^7\) It did not provide “an immediate, practical and coherent policy” of *jihad*, and in the end proved unsuccessful – after his death in 1193, *jihad* propaganda and support for the counter-crusade “evaporated almost overnight.” Saladin’s Ayyubi successors immediately ceased using the language of *jihad* not because they disagreed with it on a theological level, but mainly due to the adverse impact it had had on a practical political level: Saladin’s “*jihad* of the sword” was hugely expensive,
had weakened the Muslims, and had provoked a military response against the Muslim state in the region.78

Ibn Taymiyya and the jihad of rebellion

Another source of early contention among the scholars was over the possibility of jihad to overthrow an unjust ruler. In this case, political motivations can usually be clearly identified – the early scholar Ibn Hazm (d. 1064), for example, was one of the leading proponents of using jihad to overthrow unjust Muslim leaders, calling for the change to occur as quickly as possible using whatever means necessary, whether political reform or armed struggle. However, he was also harshly critical of the leadership of the caliphate in Andalusia, for which he was routinely imprisoned.79 Not surprisingly, Ibn Hazm also argued that traditions and verses used to justify passive obedience to ruling authorities were not applicable because they had been abrogated by later traditions in the hadith that called for revolt and struggle (including jihad) against unjust leadership. In his view, obedience to unjust and corrupt leaders was contradictory to Qur’anic texts that enjoined what was right and prohibited what was evil.

However, most later scholars diverged from this interpretation, and warned against rebellion because of the likely “costs of such action.” It is not surprising that this later pro-stability interpretation also occurred once Islamic rule had been firmly solidified and institutionalized, for this ruling was in the clear interests of the political elites of the time.80 Nevertheless, the debates over this important aspect of jihad continued, and “it is

78 Bonney, 88-89.
79 Ibid., 77.
80 Ibid., 78.
clear that with the passing of time, the differences between the jurists on the issue of *jihad* and its relations to questions of political power widened rather than diminished.  

No scholar, jurist, or thinker in Islamic history has had a greater – or more controversial – impact on the development of the doctrine of *jihad*, and especially on the question of when (and against whom) *jihad* could be declared, than the medieval jurist Ibn Taymiyya (d. 1328). The political context in which Ibn Taymiyya wrote is crucial to understanding his arguments about *jihad*. The Abbasid Empire, which had ruled the Islamic world for centuries, had disintegrated. The Mongols from the East had invaded, conquered, and dominated much of the Muslim world. Many of the Mongol rulers, however, had publicly converted to Islam. Yet Ibn Taymiyya was unconvinced – he accused the Mongols of being “fake” Muslims, and in his writings sought to make a clear distinction between those he considered “true believers” and those who were partial converts, lapsed believers, or apostates. The Mongol rulers were not true Muslims, Ibn Taymiyya argued, because their “conversion” to Islam had not been reinforced by the adoption of Islamic practices like the institution of *shari’a* as the law of the land.

Utilizing the language of *jihad*, Ibn Taymiyya proclaimed that it was an Islamic duty to “fight the Mongols who came to Syria.” Yet Ibn Taymiyya went even further – it was not only the unjust, impious Mongol rulers that were to be fought, but also any Muslims who accepted the Mongol rulers, or even neglected to fight against them. In 1303, Ibn Taymiyya issued a *fatwa* against the Muslims of Mardin who had surrendered to the Mongols in 1260, because they “showed apathy about the [non-Islamic] law

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81 Bonney, 79.
82 Ibid., 114.
83 Ibid., 113.
imposed by the Mongols and their refusal to undertake *jihad* against the Mongol occupation.”

This *fatwa* was in fact one of the first precedents for the doctrine of *takfir*, or declaring self-described Muslims to be apostates and legitimate targets of violence. Ibn Taymiyya explained in the above *fatwa* that “Any community or group that refuses to abide by any clear and universally accepted Islamic law...must be fought until they abide by its laws. This applies even though they make the verbal declaration [*shahada*, or expression of Islamic faith] and abide by some of its laws.” While Ibn Taymiyya was reluctant to employ the term *takfir* in his *fatwas* against allegedly “false” Muslims, he considered it appropriate to determine a Muslim’s “Muslimness.”

To support his argument, Ibn Taymiyya cited the example of the caliph Abu Bakr in fighting the rebellious tribes who refused to pay the *zakat* to the central government in Medina, as well as a hadith report in which Muhammad declared that anyone who helps or supports “oppressive” and “wicked” rulers “will not come to me on the Day of Judgment.” Ibn Taymiyya also addresses the important question of leadership in *jihad* – for if it is the duty of all Muslims to fight against and unjust or impious ruler, then the classical prescription which insisted that *jihad* be declared only by a *caliph* or *Imam* cannot be followed. Ibn Taymiyya circumvents this restriction by declaring, “We should join *jihad* against them with any ruler, commander, or group that is closer to Islam than they, if such is the only means of fighting them.”

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85 Ibid.
86 Bonney, 120.
decentralization of the leadership of jihad was a key development in the evolution of the doctrine.

Ibn Taymiyya was a prolific writer, and in his later treatises he further expanded his views on jihad. In his treatise on Public Policy in Islamic Jurisprudence, Ibn Taymiyya wrote that “he who forsakes the Law of Islam should be fought, though he may have once pronounced…Faith [in Islam].”88 In his famous chapter on “The Religious and Moral Doctrine of Jihad” in Governance According To…, Ibn Taymiyya wrote that jihad was “the best voluntary [religious] act that man can perform,” – even greater than performing the hajj – and saying that performing it “implies love and devotion for Allah.”89 Those who participate in jihad have only two outcomes: “either victory and triumph or martyrdom and Paradise.” Ibn Taymiyya added that death while performing jihad is superior to all other forms of dying: “the death of a martyr is easier than any other form of death. In fact, it is the best of all manners of dying.” Again, he emphasized that “if a rebellious group, although belonging to Islam, refuses to comply with clear and universally accepted commands, all Muslims agree that jihad must be waged against them, in order that the religion will be God’s entirely.”90 He repeated his conclusion again later, “those who depart from the law of Islam must be fought, even if they pronounce the…professions of faith.”91

Ibn Taymiyya also argued that jihad was obligatory whether the jihad was offensive or defensive:

The most serious type of obligatory jihad is the one against the unbelievers and against those who refuse to abide by certain prescriptions of the shari’a, like those who refuse to pay zakat, the

88 Bonney, 115.
90 Ibid., 50.
91 Ibid., 52.
Kharijites and the like. This jihad is obligatory if it is carried out on our initiative and also if it is waged as defence.\textsuperscript{92}

However, Ibn Taymiyya goes on to clarify that only defensive \textit{jihad} can be considered an individual obligation on every Muslim (\textit{fard al-ayn}) – offensive \textit{jihad} is by contrast a collective duty (\textit{fard al-kifaya}), meaning that if it is fulfilled by a sufficient number of Muslims, the rest of the Muslims \textit{umma} need not participate, and merit will be given to those who took the initiative to fight. Ibn Taymiyya explains that only defensive \textit{jihad} is performed out of necessity – the offensive type of jihad “is voluntary fighting in order to propagate the religion, to make it triumph and to intimidate the enemy…”\textsuperscript{93}

Richard Bonney writes that “no other Muslim writer, medieval or contemporary, has exercised as much influence on the modern radical Islamist movement as Ibn Taymiyah.”\textsuperscript{94} Many aspects of Ibn Taymiyya’s ideology would come to characterize modern militant Sunni movements, such as rejection of Sufism – especially “innovations” such as the worship of saints and pilgrimages to shrines – and hatred for the Shi’a, who Ibn Taymiyya described as “more dangerous than the Jews and the Christians and…more to be feared since they acted treacherously within the [Muslim] community.”\textsuperscript{95}

Although Muslim critics of Ibn Taymiyya point to the fact that he was imprisoned four separate times, by a judge from each of the four major schools of Islamic jurisprudence, as a reason to dismiss him as an extremist not worthy of the title of Shaykh al-Islam, “for militant anti-establishment Islamists his several arrests and death in prison only serve to confirm his radical credentials.”\textsuperscript{96}

\textsuperscript{93} Ibid., 53-4.
\textsuperscript{94} Bonney, 111.
\textsuperscript{95} Bonney, 120.
\textsuperscript{96} Ibid.
Muhammad Ibn ‘Abd al-Wahhab and the Sa‘udi jihad

Muhammad Ibn ‘Abd al-Wahhab was an 18th century scholar and Islamic reformer from the central Arabian region of Nejd. He came from a prestigious family of jurists and scholars of the Sunni Hanbali school of jurisprudence, and was himself a serious student of Islamic theology. Ibn ‘Abd al-Wahhab believed that a return to strict adherence to *tawhid*, or “absolute monotheism,” was the only way to restore the glory of Islam and create a just, stable, and powerful Islamic society.97 The *shahada*, or vocal expression of Islamic faith, proclaims that “there is no god but God, and Muhammad is the messenger of God.” Ibn ‘Abd al-Wahhab saw a need for a “return” to the essence of that monotheism, which he saw as having eroded under the centuries of Ottoman rule, and believed that adherence to *tawhid* should be stringently reflected in public and social life.

In fact, the ideology espoused by Muhammad Ibn ‘Abd al-Wahhab was heavily influenced by the writings and teachings of Ibn Taymiyya.98 Drawing inspiration from Ibn Taymiyya, Ibn ‘Abd al-Wahhab sought to “find a pure Islam, untainted by the developments of later centuries.”99 Like Ibn Taymiyya, Ibn ‘Abd al-Wahhab was also firmly against the adoption of any rituals or beliefs of any other religions into Islamic practice, many of which he believed had been absorbed into Islam by the 18th century. He also opposed *taqlid*, or following the accumulated interpretations of Islamic law over the

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centuries by legal specialists, which he felt had become more important to the *ulema* than the actual direct study of the Islamic scriptures themselves.¹⁰⁰

Ibn ‘Abd al-Wahhab further believed that practices such as praying for the intercession of saints or prophets was an expression of “polytheism,” because it violated *tawhid* by taking the focus away from God. In each area where Wahhabism spread, there are countless stories of Ibn ‘Abd al-Wahhab personally ordering the graves of all Muslim saints dug up and their remains scattered, so as to prevent the people from engaging in activities that would compromise *tawhid*.¹⁰¹ He even believed that visiting the Prophet’s tomb was heretical, as well as celebration of the Prophet’s birthday (*mawlid an-nabi*). Additionally, he felt that mosques should be free of decoration and none could bear an inscription of the Prophet’s name.¹⁰²

The puritanical ideology preached by Ibn ‘Abd al-Wahhab was relegated to a small minority of followers until he allied with the tribal leader Muhammad Ibn Sa‘ud in the late 18th century. This combination of politico-military and ideological power gave new life to Ibn ‘Abd al-Wahhab’s movement.

Ibn ‘Abd al-Wahhab promised Ibn Sa‘ud that he and his descendents would “rule over the lands of Nejd and its regions” if he dedicated himself to the promotion of *tawhid* among his subjects. Apparently tantalized by this promise of conquest and power, Ibn Sa‘ud and Ibn ‘Abd al-Wahhab swore a mutual oath of loyalty in 1744.¹⁰³ According to the pact, “you [Ibn Sa‘ud] will perform *jihad* against unbelievers. In return you will be…leader of the Muslim community and I [Ibn ‘Abd al-Wahhab] will be leader in

¹⁰⁰ DeLong-Bas, 12.
¹⁰² Schwartz, 70.
¹⁰³ DeLong-Bas, 34.
religious matters.”\textsuperscript{104} This combination of military-political power and religious-ideological authority made the Wahhabi-Sa‘udi alliance especially potent, since the amir (political leader) could conduct military operations, but only the Imam (religious leader) could legitimize such operations in a religious context and declare them part of rightful \textit{jihad}.\textsuperscript{105}

Later that year, the alliance declared \textit{jihad} against all polytheists (interpreted as those who did not accept Ibn ‘Abd al-Wahhab’s formulation of \textit{tawhid}). Thus began the first joint Wahhabi-Sa‘udi military conquest of the Arabian Peninsula. In this and subsequent cases, the assault would begin on the ideological front, with Ibn ‘Abd al-Wahhab sending a letter to the leader of a town or region calling on him to accept his teachings, especially the principle of \textit{tawhid}. Many leaders, realizing that Ibn ‘Abd al-Wahhab was backed by the power of Ibn Sa‘ud, responded positively and accepted the doctrine, peacefully surrendering to Wahhabi-Sa‘udi authority. If the leader did not accept the Wahhabi doctrine, Ibn Sa‘ud would commence his military operations against the leader and his tribe.\textsuperscript{106} This action was legitimized by Ibn ‘Abd al-Wahhab’s adaptation of Ibn Taymiyya’s \textit{takfir} ideology – although Ibn ‘Abd al-Wahhab recognized that only those people who had been previously instructed in the Qur’an and \textit{hadith} but had then rejected the faith could be called an apostate and an unbeliever, his views on \textit{shirk} (polytheism) meant that he considered most Muslims, aside from his own followers, guilty of such “associationism.”\textsuperscript{107} Thus, those tribes who refused to accept his

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\textsuperscript{104} Madawi al-Rasheed, \textit{A History of Saudi Arabia} (New York: Cambridge University Press, 2002), 17. \textsuperscript{105} DeLong-Bas, 35. \textsuperscript{106} DeLong-Bas, 36. \textsuperscript{107} Mark J. Sedgwick, \textit{Sufism: The Essentials} (New York: American University in Cairo Press, 2003), 95.\end{flushleft}
interpretation of *tawhid* could not be considered true Muslims, and it was therefore permissible for Ibn Sa‘ud’s forces to fight against them.

Although initially successful in conquering much of the Arabian Peninsula, the Wahhabi-Sa‘udis were eventually defeated by Muhammad ‘Ali Pasha, the powerful Ottoman governor of Egypt. Muhammad ‘Ali was persuaded by Istanbul to lead his forces into Arabia to expel the Wahhabi-Sa‘udis from the Hijaz in 1811. Muhammad ‘Ali’s superior and modernized forces were more than a match for the Bedouin raiders, and the Egyptian governor retook Mecca and Medina in 1812. However, a remnant of Wahhabi-Sau’dis remained in the Nejd, and began their resurgence in 1865, when they established their capital in Riyadh. After being again defeated and exiled to Kuwait, the Wahhabis returned under the leadership of ‘Abd al-‘Aziz ibn ‘Abd al-Rahman Al Sa‘ud in 1901, initiating their re-conquest of the peninsula.

At this time, ‘Abd al-‘Aziz Ibn Sa‘ud made an important strategic decision in his bid to control Arabia. In 1912, the *Ikhwan*, or “Brotherhood” were organized as a Wahhabi paramilitary militia. The *Ikhwan* were a Bedouin tribe that settled in the town of al-Artawiyyah in 1912 with the permission of ‘Abd al-‘Aziz Ibn Sa‘ud, who then adopted and organized their movement under the Sa‘udi banner by sending Wahhabi missionaries to them.\(^{108}\) The purpose of sending these *mutawwi’in* to the desert tribes was “to kindle them in a zeal for *jihad*” using Wahhabi ideology.\(^{109}\) According to Schwartz, the *Ikhwan* were originally envisioned by ‘Abd al-‘Aziz Ibn Saud as a way to control the Bedouin

\(^{108}\) Poore, 36.

\(^{109}\) Schwartz, 97.
tribes and keep them under Saudi-Wahhabi control, as well as utilize them as an effective fighting force for his conquest of the Arabian Peninsula.¹¹⁰

The effect of this acceptance of Wahhabi ideology was to transform the *Ikhwan*’s traditional raids against other tribes for material gain into *jihad* against the “unbelievers” for the sake of Islam.¹¹¹ It also meant that the Bedouin warriors were now ready to sacrifice themselves for the sake of Wahhabi Islam, and these fighters became “consumed by their desire for martyrdom.” Inspired by religious rhetoric, the *Ikhwan* were known for brazenly charging enemy lines despite usually being heavily outnumbered. The *Ikhwan* also abandoned the traditional rules of warfare developed by the Bedouin over the centuries. Poore observes that “their honor was now found in killing, and they maximized bloodshed to the point of excess in the name of religion.”¹¹² Despite their legendary brutality, their enthusiasm for battle clearly also had a profound impact in assisting ‘Abd al-‘Aziz Ibn Sa‘ud’s expansion and conquests – indeed, with the help of the *Ikhwan*, ‘Abd al-‘Aziz Ibn Sa‘ud extended the borders of his kingdom into the Eastern Province and the Hijaz.¹¹³ Between 1916 and 1928, a full twenty-six Bedouin uprisings against Wahhabi-Saudi authority were brutally suppressed by the *Ikhwan*.¹¹⁴

With the conquest of Mecca and Medina in 1924 and the ousting of the ruling Hashemite dynasty, ‘Abd al-‘Aziz Ibn Sa‘ud’s control of the Arabian peninsula was nearly complete. However, the *jihadi* enthusiasm of the *Ikhwan* would soon outlive its political usefulness to ‘Abd al-‘Aziz Ibn Sa‘ud. Until this point, the Wahhabis had only invoked *jihad* against other rival Muslims who stood in their way during the conquest of

¹¹⁰ Schwartz, 96.
¹¹¹ Poore, 38.
¹¹² Ibid., 39.
¹¹³ Bonney, 165.
¹¹⁴ Poore, 39.
the Arabian peninsula. When following the conclusion of World War I the Ikhwan demanded that ‘Abd al-‘Aziz Ibn Sa’ud continue the jihad against the British in Iraq, Transjordan, and Kuwait, he refused, realizing that British interests and power in those regions were too strong to be challenged. ‘Abd al-‘Aziz Ibn Sa’ud then joined with the ulema against the Ikwhan and defeated them soundly at the battle of Sibillah in 1930. Having served their purpose in the Sa’udi conquest of the peninsula, the Ikhwan were crushed, as ‘Abd al-‘Aziz Ibn Sa’ud imprisoned the rebellious Ikhwan leaders and firmly restored his control. Karpat concludes that the Sa’udis “relied on Wahhabism [only] when convenient” and were quick to control and suppress it when it posed any challenge to their political authority.115

The Ottomans and jihad

Under the domination of the Ottomans, the practice of jihad in the Muslim world took on a decidedly different role – rather than directing jihad against external enemies such as the Byzantines, the early Ottomans invoked jihad mainly against other rival Muslims.

The Ottomans undertook countless raids and campaigns into Europe, but these actions were known by the Turkish variation, ghaza, or “raiding.” In the view of Ottoman historian Cemal Kafadar, ghaza meant “raiding,” not “divinely-commanded war” (jihad); it was not constrained by the legal norms of jihad and often served as a tool for expansion and the acquisition of treasure, as well as glory in battle for the ghazi warriors. This may be partially because these Ottoman ghazi warriors often allied with Christians and incorporated other “infidels” into their ranks, so the ideology of these ghazis is

115 Karpat, 27.
Yet in a speech to the council that decided to launch the conquest of Byzantine Constantinople, sultan Mehmed II argued that

The ghaza is our basic duty, as it was in the case of our fathers. Constantinople, situated as it is in the middle of our dominions, protects the enemies of our state and incites them against us. The conquest of this city is, therefore, essential to the future and safety of the Ottoman state.  

Although the sultan referred to the ghaza as a “basic duty,” he followed it by using rather conventional political arguments for a campaign against Constantinople (its geostrategic location and the fact that it was giving aid and protection to the enemies of the Ottoman state). Yet after the conquest was complete, Mehmed II proclaimed that “he was the only Muslim ruler who could ‘fit out the people waging the holy wars of ghaza and jihad.’”

One of the most prominent examples of early Ottoman ghaza came during the conflict between the Ottoman sultan Selim and the Mamluk rulers of Egypt in the early 16th century. Once Selim had defeated the Mamluks, the caliph in Cairo transferred all rights to the caliphate to Selim and his heirs, linking the caliphate and the Ottoman dynasty. In addition, the wars between the Sunni Ottomans and the Shi‘i Safavid Empire were often viewed as an ideological conflict between Sunnism and Shi‘ism, and the Ottoman leadership regarded each new campaign against the Safavids as the beginning of a new ghaza.

The later Ottomans, however, increasingly used religious exhortations and proclamations of jihad to justify military conflicts. When the Russians annexed the Crimea in 1783, the Ottoman sultan Abdulhamid I declared that it would be retaken with a ghaza. Likewise, Napoleon Bonaparte’s seizure of Egypt in 1797 was met with a

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116 Bonney, 128.
117 Ibid.
declaration of *jihad* against “infidel savages” who had captured Muslim land. Sultan
Selim III claimed that the French invasion of Egypt endangered the holy cities of Mecca
and Medina and would result in “territorial fragmentation and the extirpation of Muslims
from the face of the earth.” Selim III further claimed that other religious groups were also
at risk because the French “doctrine of liberty was hostile to religion.”

These proclamations of *jihad* can be understood in the context of the considerable
weakening of Ottoman authority and control over their disparate territories and regions
during the 18th century. As the corrupt, bureaucratic Ottoman administration became
increasingly unpopular with its subjects, the great colonial powers of Europe had begun
carving up the Ottomans’ dominions. The Ottoman rulers’ increased usage of *jihadi*
rhetoric to rally support against these invasions and incursions was undoubtedly a
reflection of their internal and external political weakness.

This pattern would continue throughout the 19th century. During the Greek
revolution of 1821, believing that he was the victim of a Christian conspiracy backed by
Russia, Sultan Mehmud II sought a declaration of *jihad* from the chief Mufti against the
Greek Christians. After consulting the Greek Orthodox Patriarch in Constantinople (who
opposed the rebellion), the Mufti refused to declare a *jihad* – and as a result was replaced
and then executed by Mehmud II, along with the Patriarch and other Greek Orthodox
leaders.

Yet the Ottomans continued to respond to European invasions with declarations
of *jihad*. The fourth Russo-Turkish war launched in 1877 by Russian Tsar Alexander II
“for Orthodoxy and Slavdom” sought to “neutralize, if not liquidate, the Ottoman state

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120 Karpat, 51.
121 Bonney, 146.
and the caliphate as a political and cultural-religious force.” With the full backing of the chief mufti, sultan Abdulhamid II proclaimed a defensive *jihad* against the Russians. The war was a disaster for the Ottoman state – 300,000 Muslims were killed and a million subjects were displaced from the Balkans and Caucasus, and the Ottomans lost control over Serbia, Montenegro, Romania, and Bulgaria. In the Berlin Conference of 1878, the Ottomans lost two fifths of their territory and one fifth of their population.122 When Greece absorbed Crete in 1897, Abdulhamid II “reluctantly” declared *jihad* against Greece and won a quick victory in less than a month.

When the British invaded Egypt in 1882, Egyptian journals, publications, and mosques proclaimed *jihad* in defense of Muslim lands. The leader of the short-lived Egyptian resistance, Ahmad ‘Urabi, was described in such publications as “the leader of the *mujahidun*” who “has sold himself and his army to the *jihad* in the path of God…”123

Faced with the serious decline of Ottoman power and the danger of complete collapse of the empire, Abdulhamid II decided to assert his role as caliph and “threatened to launch an international *jihad* against imperialism if Muslim interests were seriously damaged by the great powers,” which were now clearly intent on carving up what was left of the empire. Abdulhamid II also began to emphasize his title as caliph (*amir al-muslimin*) rather than sultan in order to “place the stress on Muslim unity.”124 He saw this as an advantage:

As long as the unity of Islam continues, England, France, Russia, and Holland are in my hands, because with a word [I] the caliph could unleash the *jihad* among their Muslim subjects, and this would be a tragedy for the Christians…one day [Muslims] will rise up and shake off the infidel’s yoke. Eighty-five million Muslims under [British] rule, 30 million in the colonies of the Dutch, 10 million in Russia…altogether 250 million Muslims are beseeching God for delivery from foreign

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122 Bonney, 148.
123 Bonner, 159.
124 Bonney, 149.
rule. They have pinned their hopes on the caliph, the deputy of the Prophet Muhammad. We
cannot [therefore] remain submissive in dealing with the great powers.125

However, Abdulhamid II realized that “a miscalculated jihad could backfire; it was the
properly manipulated threat of jihad alone which might produce suitable results” for the
Ottomans.126 The sultan was convinced that the European powers were taking over his
territory and encouraging the “liberation” of other parts of the empire as part of a new
“crusade.” Bonney notes that “in using this term, [Abdulhamid II] was echoing the
terminology of writers who made the comparison of contemporary colonialism to the
earlier Crusading era.” The use of this rhetorical device would increase dramatically
during the rise of the radical Islamist movement in the twentieth and twenty-first
centuries. The pan-Islamic press eagerly jumped on Abdulhamid II’s use of such
language, and the first Muslim history of the Crusades, published in 1899, noted that “our
most glorious sultan, Abdulhamid II, has rightly remarked that Europe is now carrying
out a crusade against us in the form of a political campaign.”127 This is a tactic that would
be repeated by the militant Islamists of the later 20th century, including Osama bin Laden.

During World War I, the call to jihad was issued by the Ottomans in five separate
fatwas calling for the “Muslims of Turkish stock in Kazan, Central Asia, Crimea, India,
Afghanistan and Africa to rise against their Russian and European masters.” One

particular fatwa issued 11 November 1914, read:

Question: Now that it has been established that Russia, England, France, and the governments that
support them and are allied to them, are hostile to the Islamic Caliphate, since their warships and
armies attack the Seat of the Islamic Caliphate and the Imperial Dominions and strive (God forbid)
for extinguishing and annihilating the exalted light of Islam, is it, in this case, also incumbent upon
all Muslims that are being ruled by these governments to proclaim jihad against them and to
actually attack them?

125 Karpat, 176.
126 Bonney, 149.
Karpat notes that there is considerable evidence, including letters between German and Ottoman officials, that the German government actually encouraged the Ottomans’ declaration of jihad against France and Britain – in fact, the potential to use pan-Islamism and especially jihad as a weapon to weaken their European adversaries was an especially promising prospect for the Germans in their efforts to persuade the Ottomans to ally with the Central Powers. German Baron Max Von Oppenheim had spent considerable time in the Middle East and “believed that if Turkey participated in war against England, it could incite other Muslims to rebel and tie down much of the British army and navy.”

However, these calls to jihad produce virtually no Muslim response, perhaps because, as Karpat argues, the Muslim subjects in question “had no compelling interest in fighting for one European power against the other,” as the Ottomans were allied with Germany and Austria-Hungary. Or, as Bonney points out, by this point the Ottoman caliphate’s call to jihad was nearly completely discredited, since it “smacked of opportunism.” During the late 19th century, the Ottoman sultans were sensing the impending collapse of their empire, weakened by corruption, economic domination, and European colonial encroachment. Sultan Abduhamid II, for example, feared that allowing the independence of the Balkan states would lead to a domino effect of secession by other Arab regions, and even the loss of Anatolia. He therefore sought to strengthen the ties between the state and Islam in order to bolster his own credibility and preserve the unity of the empire. He saw this as a way to “prevent the Arabs from breaking away, and [he]

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129 Karpat, 222.
130 Karpat, 257.
131 Bonney, 150.
invoked the threat of [jihad] to prevent further interference in Ottoman domestic affairs” by the European powers on the pretext of protecting the “rights” of Christian minorities.132

When Mustafa Kemal “Ataturk” proclaimed the Turkish Republic and abolition of the caliphate in 1922, so ended “over four and a half centuries of Ottoman history…in which state-controlled jihad was present at the outset and subsequently had never been very far from the centre of political affairs.”133 Yet it is also telling that no Ottoman sultan ever performed the pilgrimage to Mecca during the six centuries that the dynasty existed.134

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132 Karpat, 321.
133 Bonney, 153.
134 Bonney, 132.
PART II: Political Islam and Jihad in the 20th and 21st Century

Political Islam and the modern jihad

Beginning at the end of the 19th century, a trend developed among Islamic jurists which attempted to define jihad as exclusively defensive warfare. These jurists cited classical examples like that of al-Shafi’i and emphasized the Qur’anic verses, such as Q.8:61 that called for reconciliation and peace: “But if they incline to make peace, then incline to it also, and trust in God.” They also attempted to put the traditionally “offensive” verses about jihad (such as the “sword verses”) into context and downplayed the doctrine of naskh.135 These jurists were fully aware that the historical example of military campaigns by Islamic rulers, as well as “the classical legal literature as a whole[,] recognized offensive as well as defensive warfare.”136 However, their purpose in attempting to shift the definition of jihad this was to ensure the place of shari’a in modern Islamic societies, which were at that time almost universally under the domination of European colonial powers. By emphasizing jihad as a primarily defensive doctrine and downplaying its ability to be used to justify offensive warfare, these jurists were attempting to make jihad – and shari’a in general – appear more palatable and less threatening to their European rulers.

This emphasis would soon change, however. Chafing under the weight of colonial domination by the European powers, many Arab intellectuals, writers, and scholars began supporting ideologies that promised liberation from colonial rule and a return to a golden age of prosperity and power. Many of these intellectuals would lend their support to the secular Arab nationalist movement, but not all.

135 Bonner, 161.
136 Ibid., 160.
Political Islam, or Islamism, arose as an alternative reformist ideology. Supporters of political Islam claimed that any government that based its authority on a source other than Islam was illegitimate, and the proliferation of such governments was responsible for the decline of the Muslim world. Islam, they argued, precluded the idea of modern nation-states due to the fact that Muslims are members of a worldwide *umma*, or global community of believers. Islam was not meant to be simply a religion or a system of belief, but a way of life and perfect model for social and political organization – one that if implemented in its true form could fix all the ills that plagued the Muslim world, including poverty, corruption, and weakness that allowed for domination by the Western powers. Hence the quintessential, all-encompassing Islamist motto: “Islam is the solution.”

**Hasan al-Banna and the jihad of the Muslim Brotherhood**

In 1928, Egyptian scholar and activist Hasan al-Banna (d. 1949) founded an organization that would become one of the most popular and enduring Islamic political movements of the modern era: *al-Ikhwan al-Muslimin* – the Muslim Brotherhood. The Muslim Brotherhood was founded just after the collapse of the Ottoman Empire and the Caliphate, meaning that no authentic Islamic political authority existed for the first time in over 1300 years. Al-Banna rejected the system of nation-states that had sprung up throughout the Muslim world following World War I which were based on Western-style institutions and political structures. He strongly believed that only a government which based its legitimacy and policies exclusively on the Qur’an and the *shari’a* could be
successful in revitalizing the Islamic world. Al-Banna was responsible for pioneering the idea of Islam as a nizal al-kamil wa shamil – “a complete and perfect system.”

In his famous letter to King Farouk of Egypt, entitled “Towards the Light,” al-Banna’s case for Islamic government was laid out most clearly. He described Egypt as poised at a crossroads, with two paths available – either the way of Islam and Islamic principles, or the way of the West and its organization and methods of governance. Arguing in favor of the former, al-Banna lauded the many benefits of Islamic governance, citing the historical example of great Islamic civilizations as well as the unifying effect that a government based on Islam could have on the Islamic world, which would give it a “great moral advantage.” He also promised that an Islamic system would “be able to solve the many complicated problems which the present institutions have failed to solve.” Indeed, al-Banna argued that “there is no regime in this world which can supply the forthcoming nation with what it requires in the way of institutions, principles, objectives, and judgments to the same extent as Islam can.” Al-Banna also noted the strengthening effect that Islam could have on the armed forces of the nation by “igniting in them the spirit of Islamic jihad.” Rather than fighting for a regime or secular nation, soldiers in al-Banna’s vision would instead be fighting for Islam.

Hasan al-Banna believed that armed jihad against corrupt rulers and regimes was a legitimate method of achieving the ideal Islamic state, enshrining it as a modus operandi even in the Muslim Brotherhood’s motto: “Allah is our objective. The Prophet is our Leader. The Qur’an is our Constitution. Jihad is our way. Dying in the way of

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137 Hillel Fradkin, “The History and Unwritten Future of Salafism,” Current Trends In Islamist Ideology 6, (Hudson Institute, 2008), 12.
Allah is our highest hope.”¹³⁹ Yet al-Banna did not believe that immediate *jihad* to overthrow the government was desirable – instead, he favored a gradualist approach in which the Brotherhood would seek to reform and educate society at the grassroots level in true Islamic teachings and values as a necessary precondition for the ultimate political empowerment of Islam. This ultimate triumph could occur either through a peaceful transition or through violent *jihad* – but only after the citizenry had been properly Islamized.

Political developments, however, would lead to dissent from this gradualist approach. Fearing the Brotherhood’s increasing popularity and rumors that it was planning to overthrow the government, Egyptian Prime Minister Mahmoud al-Nukrashi Pasha ordered the Brotherhood disbanded in December 1948. In response, the Prime Minister was assassinated by a member of the Brotherhood, and in turn Hasan al-Banna himself was assassinated in February 1949, most likely by a member of the Egyptian intelligence service. Outlawed in Egypt and with thousands of its members rounded up and imprisoned by the authorities, the Brotherhood went underground.

**Mawdudi and Qutb: *jihad* as worldwide revolution**

Another figure important to the rise of militant Islamism in the 20th century was the Indian ideologue Sayyid Abu’l ‘Ala Mawdudi (d. 1979). Mawdudi’s influence on modern Islamist movements is considerable – his supporters have praise him as “the Ibn

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¹³⁹ Fradkin, 14.
In a famous speech he delivered in 1939, Mawdudi laid out a clear and concise summary of Islamist ideology concerning *jihad*:

> [T]he objective of Islamic *jihad* is to eliminate the rule of a non-Islamic system and establish in its stead an Islamic system of state rule. Islam does not intend to confine this revolution to a single State or a few countries; the aim of Islam is to bring about a universal revolution. Although in the initial stages it is incumbent upon members of the party of Islam to carry out a revolution in the state system of the countries to which they belong, but their ultimate objective is no other than to effect a world revolution.\(^{141}\)

Mawdudi’s book *Al-Jihad fi’l Islam* (Jihad in Islam), published in 1930, was extremely influential in the Muslim community. Mawdudi was troubled by the Ahmadi movement, which opposed the idea of armed *jihad* “on the grounds that it was incompatible with the spirit of Islam as a religion of peace and that it sought to propagate the Islamic faith through violence. Mawdudi believed it was important to offer a traditional defense of *jihad*, “lest the Ahmadi view...began to gain ground with Muslims.”\(^ {142}\) Mawdudi argued that the era of *jahiliyya* prior to Islam was characterized by extreme violence. *Jihad*, Mawdudi argued, was instead based on a respect for life, because it protected people from each other. He emphasized that Islam explicitly forbade conversion by force – this was not the purpose of *jihad*. Instead, *jihad* was necessary to “liberate [people] from injustice and violence.” Under an “unjust” political system, Mawdudi believed that it was impossible for Muslims to accomplish their primary objective on the earth – “enjoining right and forbidding wrong.”\(^ {143}\) To this end, Mawdudi argued that

> Islam has prescribed that by systematic endeavour, *jihad* – and if the necessity should befall, by war and bloodshed – all such governments should be wiped out. In their place a just and equitable system of government should be erected which is founded upon the fear of God and based upon the canons He ordained.\(^ {144}\)

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\(^{142}\) Bonney, 202.  
\(^{143}\) Q.3:104.  
The ideas of Mawdudi were not confined to the Indian peninsula, but rather spread throughout the Muslim world, influencing many Islamist thinkers during the mid-twentieth century and beyond. One of these was the Egyptian writer and ideologue Sayyid Qutb (d. 1966). According to Adnan Musallam, Mawdudi’s writings had a significant impact on Qutb’s political radicalization.\footnote{Adnan A. Musallam, \textit{From Secularism to Jihad: Sayyid Qutb and the Foundations of Radical Islamism} (London: Praeger Publishers, 2005), 151-2.}

A popular writer and activist, Qutb succeeded al-Banna as the ideological leader of the Muslim Brotherhood. Qutb, however, departed radically from the ideas of al-Banna in several important ways. Unlike al-Banna, who pointed to the Muslim \textit{ummah} as the ideal example of unity and brotherhood among believers, Qutb argued that a true Muslim community only existed in a society in which Islam took a “concrete form.” Therefore, Qutb argued that “the Muslim community has been extinct for a few centuries.” The \textit{ummah} did not exist simply in lands “in which Islam resides” or “a people whose forefathers lived under the Islamic system at some earlier time,” but rather it only existed in “a group of people whose manners, ideas and concepts, rules and regulations, values and criteria, are all derived from the Islamic source.”\footnote{Sayyid Qutb, \textit{Milestones} (1964; repr., Cedar Rapids: Unity Publishing, 1981), 9.} In short, a “true” Islamic community only existed in a “pure” Islamic state based solely on the Qur’an and the \textit{shari’a}.

Also influential was Qutb’s theory that the world had entered a new era of \textit{jahiliyya}, or “ignorance.” This term was a reference to the state of affairs that existed in pre-Islamic Arabia. “The whole world is steeped in \textit{jahiliyya},” wrote Qutb, and the
modern nation-states had committed “rebellion against God’s sovereignty on earth [by] transfer[ing] to man one of the greatest attributes of God, namely sovereignty, and mak[ing] some men lords over others.”¹⁴⁷ This modern jahiliyya was different from the ancient form because it allowed for the creation of rules, laws, and societies “without regard to what God has prescribed.”¹⁴⁸ Qutb believed the only way to lead mankind out of this neo-jahiliyya was to create a “vanguard” which “marches through the vast ocean of jahiliyya which has encompassed the entire world.”¹⁴⁹ His book Ma’alim fi al-Tariq (“Milestones”) was to serve as a guide for this “vanguard” of Islamic revolution.

One of the most striking differences between Qutb and al-Banna was their diverging views on the timing and applicability of jihad. In his earlier years, Qutb did echo many sentiments similar to al-Banna’s emphasis on Islamic education and Islamization of a society as a prerequisite for the empowerment of Islam: “only after…every individual of the society…firmly believes that this system has been legislated by God Almighty.”¹⁵⁰ He emphasized the practical emphasis of the Brotherhood’s mission: “Islamic government cannot be established before the people or the majority of them are aware and convinced by the form of Islamic life…”¹⁵¹ However, Qutb’s focus gradually shifted, and he eventually offered a far more immediate, violent, and revolutionary prescription for jihad.

Qutb had been profoundly influenced by the dire socio-economic conditions in Egypt during the first half of the twentieth century. In some of Qutb’s early poems,

¹⁴⁷ Qutb, Milestones, 11.
¹⁴⁸ Ibid.
¹⁴⁹ Ibid., 12.
¹⁵⁰ Ibid., 27.
published in the 1930s, he laments the “age of tyranny” and “barbarity” in which he was living, in which the people were suffering with “no dignity and…no honor.” Much of Qutb’s poetry commented on the “injustice in his society…[and] also the behaviour of imperialism.” He bemoaned the British influence in Egyptian society and “support of the class of wealthy absentee landowners who dominated parliament [which] resulted in poverty…[which] was becoming increasingly desperate.” Qutb even mentioned jihad as the solution to these ills – “From the jihad I do flee not, I never was weak-hearted.”

In addition to these socio-political factors, another major development that had an impact on Qutb’s gradual shift to militancy was his witnessing of the brutal oppression of the Brotherhood by the government in Egypt during the 1950s. One militant poem written by Qutb in 1957, for example, was “coloured by the prison episodes of the time, when 21 of the Muslim Brothers were shot dead in their cells.” In addition, “the bloodshed in prison shifted Qutb’s moral rectitude and his focus on social reform” to place a greater emphasis on political activism, and he shifted his “program of ideological and intellectual training” to “include a point of ‘retaliation’ in order to protect the Muslims from attack by the regime.” These prison experiences led to “further radicalization of [Qutb’s] thinking,” and the “government violence against the Islamist cause has been linked to Qutb’s changing views” about the revolutionary strategies and tactics to be used against

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154 Khatab, 64.
156 Khatab, 162.
157 Ibid., 163.
unjust regimes.\textsuperscript{158} The publication of his final and most famous work, \textit{Ma’alim fi al-Tariq} ("Milestones"), written during his imprisonment from 1955-1964, was the culmination of this ideological evolution. However, this influence was not one-sided; Albert Bergesen notes that Qutb’s “ideas were both affected by, and contributed to, Egyptian political struggles.”\textsuperscript{159} The formation of Qutb’s ideas about revolutionary \textit{jihad} was certainly affected by the political climate in Egypt during the 1950s and 60s, but it also in turn had a profound impact on Islamist political movements not only in Egypt, but throughout the Muslim world.

Qutb believed that the movement of Islamic revival should not “confine itself to mere preaching to confront physical power, as it does not use compulsion for changing the ideas of people.”\textsuperscript{160} Therefore, Qutb advocated “the methods of preaching and persuasion for reforming ideas and beliefs; and physical power and \textit{jihad} for abolishing the organizations and authorities of the \textit{jahili} system which prevents people from reforming their ideas and beliefs but forces them to obey their erroneous ways and make them serve human lords instead of the Almighty Lord.”\textsuperscript{161}

Qutb blasted the “defeatist” and “apologetic” Islamic intellectuals and jurists who had proclaimed that \textit{jihad} justified only defensive warfare, saying that they had “deprived [Islam] of its method, which is to abolish all injustice from the earth, to bring people to the worship of God alone…Islam does not force people to accept its belief, but it wants to provide a free environment in which they will have the choice of beliefs. What it wants is to abolish those oppressive political systems under which people are prevented from

\textsuperscript{158} Albert J. Bergesen, ed., \textit{The Sayyid Qutb Reader} (New York: Routledge, 2008), 4.
\textsuperscript{159} Ibid., 7.
\textsuperscript{160} Qutb, \textit{Milestones}, 55.
\textsuperscript{161} Ibid.
expressing their freedom to choose whatever beliefs they want.” Qutb argued that the Qur’anic verse which forbids compulsion in religion was “unrelated” to the objective of jihad which is to “annihilate all those political and material powers which stand between people and Islam, which…prevent them from accepting the sovereignty of God.”

The goal of Qutb’s call to jihad was that the “sovereignty of God” should be established “over the entire earth,” and that “[God’s divine] laws (shari‘ah) be enforced and that the final decision in all affairs be according to these laws.” The method for achieving this, in Qutb’s view, was jihad bil-sayf – “jihad of the sword” – which would “clear the way for striving through preaching.” In essence, Qutb’s formula was the reverse of al-Banna’s original strategy for the Brotherhood (preaching and education would clear the way for armed jihad against the government). Qutb maintained that Islam should not be confined by the restrictions of jihad defined narrowly as “defensive war,” but rather as the “defense of man against all those elements which limit his freedom” – for, as in the case of Abu Bakr and the rashidun caliphs, “how [else] could the message of Islam have spread when it faced such material obstacles as the political system of the state, the socio-economic system based on races and classes, and behind all these, the military power of the government?” Qutb concluded that the objective of freeing mankind “must employ jihad,” regardless of whether the homeland of Islam is “threatened by its neighbors.” Therefore, only the “final stages” of jihad found in the

162 Qutb, Milestones, 56.
163 2:256
164 Qutb, Milestones, 57.
165 Qutb, Milestones, 58.
166 Ibid., 61.
167 Ibid., 62.
Qur'an – the verses of the sword and exhortations to offensive *jihad* – should be applicable; the earlier, less aggressive stages of *jihad* should be disregarded because they were abrogated by the later verses.\(^{168}\)

Qutb dismissed alternative explanations of *jihad* as a purely defensive or “internal” spiritual struggle as a result of “attacks on [Islam] by the shrewd orientalists.”\(^{169}\) Defending against the false accusations of the “Crusaders and Zionists” that Islam was a “religion of the sword,” some Islamic scholars defended Islam by “invoking the idea of [*jihad* as] ‘defense,’” but Qutb believed these explanations were misguided because they “lessen the value of *jihad* in Islam, narrow its scope, and apologize for each of its instances.”\(^{170}\)

Limiting *jihad* to “defensive” warfare in Qutb’s mind weakened Islamic civilization and society: “Those who say that Islamic *jihad* was merely for the defense of the ‘homeland of Islam’ diminish the greatness of the Islamic way of life.”\(^{171}\) Qutb rejected that offensive *jihad* was a “temporary phase” based on “temporary circumstances”, and instead exhorted Muslims to “eternal” *jihad* in order to “cleanse” the earth of “corruption” and “falsehood” – a struggle that will continue “until the Day of Resurrection.”\(^{172}\) Indeed, Qutb actually offered an alternative holistic reading, arguing that the reasons for prohibiting fighting during the Meccan period and restricting fighting during the early Medinan period were based solely on practical considerations – “it was a

\(^{168}\) Qutb, *Milestones*, 63.

\(^{169}\) Ibid., 64.


\(^{171}\) Qutb, *Milestones*, 78.

\(^{172}\) Ibid., 103.
question of strategy rather than principle.”¹⁷³ To Qutb, offensive *jihad* was to be the norm – not the exception.

In Qutb’s view, the conditions necessary for declaring *jihad* were broadly defined and easily met:

The reasons for *jihad*...are these: to establish God’s authority in the earth; to arrange human affairs according to the true guidance provided by God; to abolish all the Satanic forces and Satanic systems of life; to end the lordship of one man over others since all men are creatures of God and no one has the authority to make them his servants or to make arbitrary laws for them. These reasons are sufficient for proclaiming *jihad*.¹⁷⁴

Qutb’s formulation of *jihad* was an aggressive, revolutionary ideology that would “free” humankind from “*ubudiyyah* [servitude] to...the usurpers of God’s authority.”¹⁷⁵ Islam must “take the initiative” to free all human beings, and therefore Muslims had the obligation to declare *jihad*, which “cannot be restricted within any geographic or racial limits.”¹⁷⁶ Likewise, Qutb reasoned that in some cases the “enemies of Islam” may “not take any action against Islam,” but such non-interference did not disqualify them as targets of *jihad* – “Islam cannot agree to this [situation of *rububiyyat al-‘ibad lil-‘ibad*, or lordship of some men over others] unless they submit to [Islamic] authority by paying *jizya* [the poll tax].”¹⁷⁷

Qutb faced a theological challenge in his advocacy of the right of Muslims to revolt against a despotic Islamic ruler. Traditional Sunni political theory did not readily accept this right of revolution, due to the trauma of civil war and sectarian strife that afflicted the early Islamic community during its early years. As a result, the general tendency of the *ulama* was essentially to conclude that even a despotic or unjust ruler was

¹⁷³ Qutb, *Milestones*, 76.
¹⁷⁴ Ibid., 70.
¹⁷⁵ Ibid., 65.
¹⁷⁶ Ibid., 73.
¹⁷⁷ Ibid.
better than anarchy and chaos. As a corollary to this argument, the traditional Islamic religious authorities generally held that legitimate jihad was only to be led by a caliph or an established religious authority within the community. As such, Qutb’s justification for revolution on “distinctly Islamic grounds” was a bold but difficult ideological proposition. Nevertheless, his intent was to “legitimize revolt in terms of mainstream Sunni thought.”

**Jihad and terrorism: Islamist militant groups and the rise of al-Qaeda**

These aggressive formulations of armed jihad influenced a generation of Islamist activists and militant leaders throughout the Muslim world. One of the most prominent disciples of Qutb, Muhammad ‘Abd al-Salam Faraj (d. 1982) went on to become the head and main ideologue of the Tanzim al-Jihad organization (later Egyptian Islamic Jihad) which was responsible for the assassination of Egyptian President Anwar al-Sadat in 1981. Faraj’s pamphlet, *The Neglected Duty*, “built upon Qutb’s argument” about jahili society and jihad.

In *The Neglected Duty*, Faraj argued that jihad was “obligatory upon every Muslim” – a clear preference for jihad as fard al-ayn, or individual obligation. He challenged the notion that Muslims should not participate in armed jihad until they had completed the “first stage” of jihad – jihad against the nafs, or self. Citing scholars such as the 14th century Hanbali jurist Imam Ibn al-Qayyim al-Jawziyyah (a disciple of Ibn

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178 Bergesen, 7.
180 Bergesen, 5.
181 Ibid., 6.
Taymiyya) and using historical examples from the *sirah* of the Prophet, Faraj argued that *jihad* was divided into categories – not stages – and that when armed *jihad* was declared all Muslims were to participate, regardless of their level of piety.\footnote{182 Muhammad ‘Abd al-Salam Faraj, “The Neglected Duty,” in *Voices of Terror*, ed. Walter Laqueur (New York: Reed Press, 2004), 402.}

Faraj dismissed the frequently-cited *hadith* report in which the Prophet Mohammad had reportedly declared *jihad* of the *nafs* to be the “major *jihad*’ (with armed *jihad* being the “lesser *jihad*”) as a “fabrication.” This false *hadith*, according to Faraj, was introduced in order “to belittle the value of fighting by the sword so as to divert Muslims from fighting the disbelievers and hypocrites.”\footnote{183 Faraj, in Laqueur, 402.} Furthermore, he argued that based on the *hadith* in which the Prophet proclaimed that “war is deceit” and an interpretation by the 13\textsuperscript{th} century Shafi’i scholar Imam Abu Zakaria Mohiuddin Yahya Ibn Sharaf al-Nawawi, “it is permissible to deceive the *kuffar* (unbelievers) in war, unless that breaks a covenant or promise of protection.” Since Faraj argued that there was no “covenant between us and them [the rulers of the Muslims], because they are at war with the religion of Islam,” Muslims could “choose the suitable method of fighting which will enable them to deceive the enemy and achieve the victory.”\footnote{184 Ibid., 402.}

Faraj’s role in Sadat’s assassination resulted in his imprisonment and execution in 1982. However, the assassination sparked a broader roundup of Muslim Brotherhood and Gama’at al-Islamiyya members in Egypt, including two of Faraj’s fellow militant Islamist ideologues: Sheikh Omar Abd al-Rahman (known as the “Blind Sheikh”) and a doctor by the name of Ayman al-Zawahiri, who would go on to lead Egyptian Islamic Jihad and later serve as Osama bin Laden’s deputy in al-Qaeda.
Montasser al-Zayyat, a former close associate of Zawahiri, has written that Sayyid Qutb was “one of the most important figures in terms of his impact on Zawahiri, [and] Qutb’s writing was important in shaping Zawahiri’s principles” – especially concerning jihad. Indeed, Zawahiri’s 2001 book *Knights Under The Banner of The Prophet* praises Qutb’s role in encouraging an Islamic revolution:

Sayyid Qutb underscored the importance of monotheism in Islam, and that the battle between it and its enemies is at its core an ideological difference over the issue of the oneness of God. Although the Qutb group was oppressed and tortured by Nasser’s regime, the group’s influence on young Muslims was paramount. Qutb’s message was and still is to believe in the oneness of God and the supremacy of the divine path. This message fanned the fire of Islamic revolution against the enemies of Islam at home and abroad. The chapters of this revolution are renewing one day after another.  

Qutb’s influence can be clearly seen in Zawahiri’s answer to an Egyptian interrogator while in prison:

*Question:* What is the meaning of “jihad” according to your cell?
*Answer:* “Jihad” means removing the current government through resisting it and changing the current regime to establish an Islamic government instead.

*Question:* How would you replace the current government with an Islamic one?
*Answer:* Through a military coup. We were convinced that civilians and the military should cooperate to achieve this end.

*Question:* Why did you want to remove the current government?
*Answer:* Because it does not rule according to the shari’a of God, glorified be His name.  

Zawahiri, like Qutb and Faraj, believed that preaching and education alone were not sufficient to bring about the ideal Islamic society. Without the authority of an Islamic government, they argued, there would be little hope of changing people’s beliefs and values. Zawahiri warned that “the establishment of a Muslim state in the heart of the Islamic world is not an easy goal or an objective that is close at hand.” However, “it

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186 Zayyat, 43.
constitutes the hope of the Muslim nation to reinstate its fallen caliphate and regain its lost glory.”187

In *Knights Under The Banner of The Prophet*, published in December 2001, Zawahiri argued that in solving the problems of the Muslim world, “there is no solution without *jihad*.”188 Following the precedent set by others throughout history who have sought to legitimate *jihad* due to their perception that the Islamic *umma* is under siege from external foes, Zawahiri argued that *jihad* was an individual obligation, and that the Islamic movement must “hold every Muslim responsible for defending Islam, its sanctities, nation, and homeland.”189 Zawahiri’s call for obligatory individual *jihad* against the Americans and Jews emphasized the damage a single individual could inflict in waging *jihad*, taking the principle of *fard al-ayn* and extrapolating it to a chilling and extreme conclusion:

> Tracking down the Americans and the Jews is not impossible. Killing them with a single bullet, a stab, or a device made up of a popular mix of explosives or hitting them with an iron rod is not impossible. Burning down their property with Molotov cocktails is not difficult. With the available means, small groups could prove to be a frightening horror for the Americans and the Jews.190

It is interesting to note that this theme of obligatory individual *jihad* is common among many contemporary militant Islamists. The “Blind Sheikh,” Omar ‘Abd al-Rahman, who is currently serving a life sentence in U.S. prison for his role in the 1993 World Trade Center bombing, as well as a plot to bomb the United Nations headquarters and other New York City landmarks, held a similar view:

> The individual work and the *jihad* done by the individuals whether separately or in groups, is work Islam has approved and legitimized…if we said, ‘Let us wait until the establishment of an Islamic

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188 Zawahiri, in Laqueur, 428.
189 Zawahiri, in Laqueur, 432.
190 Ibid.
army,’ then we have eliminated jihad, then jihad does not exist…if it is [only] an army which should do the jihad…then there will never be jihad.191

Upon his release from prison in 1986, Zawahiri, like many Islamists at the time, traveled to Afghanistan to join the jihad against the Soviets. It was there that he met and joined forces with a wealthy Sau‘di engineer, Osama bin Laden. Bin Laden was a successful businessman who traveled to Pakistan and Afghanistan to help the mujahidin who were resisting the Soviet occupation. He helped set up training camps and bases for these fighters in the border regions of Afghanistan and Pakistan, and became one of the leaders of the “Arab Afghans,” or the Arab volunteers that had traveled to Afghanistan with the intent of waging jihad against the Soviet Union. When Saddam Hussein invaded Kuwait in 1991, Bin Laden offered the Sa‘udi regime the assistance of his Arab Afghan forces to protect the country. Not only did the Sa‘udis reject his offer, but they invited more than 500,000 American troops onto Sa‘udi soil to safeguard their security instead.192 Bin Laden regarded this decision as a horrific affront to not only himself and his movement, but also indicative of the regime’s lack of Islamic principles. In a 1995 letter of support to a group of dissenting Sa‘udi clerics (known as the sahwa), Bin Laden decried the

[D]egree of degradation and corruption to which our Islamic umma has sunk, in its government and in the feebleness and cowardice of many of its scholars in the face of its enemies…this is because of their neglect of religion and weakness of faith, which allowed the enemy [foreign troops] to attack. The enemy invaded the land of our umma, violated her honor, shed her blood, and occupied her sanctuaries.193

Zawahiri’s strategy was similar to that of many militant Islamists at the time – to focus first on defeating the “near enemy,” meaning toppling the Muslim regimes they saw as illegitimate puppets of the West. “The way to Jerusalem passes through Cairo,” Zawahiri

famously wrote in a 1995 article.\textsuperscript{194} In 1998, however, when he and Bin Laden announced the formation of the World Islamic Front for Jihad Against the Jews and Crusaders, his focus had shifted to the “far enemy” – the United States. Montasser al-Zayyat reasoned that this was not due to an ideological shift in Zawahiri’s beliefs, but rather simply a practical response to the circumstances in Egypt at the time. Zawahiri’s group, Egyptian Islamic Jihad, had faced a series of setbacks in the early 1990s, including the foiling of several attacks on government officials, an uptick in the number of arrests of EIJ members, and a decline in the organization’s financial resources.\textsuperscript{195} In addition, while the conventional wisdom is that it was Zawahiri’s ideological influence on Bin Laden during the Afghan \textit{jihad} in the 1980s which “converted” him to the \textit{jihadi} cause,\textsuperscript{196} Zayyat believes that Bin Laden had an impact on Zawahiri’s ideology as well, convincing Zawahiri that it was time to stop operations against the Egyptian regime and focus on their common enemy – the United States.\textsuperscript{197}

Bin Laden released a lengthy statement from his sanctuary in Afghanistan declaring \textit{jihad} against the Americans for their continued “occupation” of the Kingdom of Sa’udi Arabia. This document contained Bin Laden’s pseudo-juridical justifications for declaring \textit{jihad}. In it, Bin Laden (not a religious scholar himself) drew extensively upon the findings of the \textit{sahwa} in the letters of protest they sent to King Fahd during the 1991 Gulf War.

Opening with a citation of various Qur‘anic verses, Bin Laden condemns the “Judeo-Christian alliance” that has conspired to kill and oppress Muslims worldwide, and

\textsuperscript{194} Zayyat, 62.
\textsuperscript{195} Ibid., 64-5.
\textsuperscript{196} Ibid., 68.
\textsuperscript{197} Zayyat, 69-70.
cites “the attacks and massacres committed against Muslims everywhere,” repeatedly
drawing historical parallels between the current political situation and the Crusader
invasions of the medieval period. According to Bin Laden, the most egregious of these
conspiracies was the stationing of American troops on Sa‘udi soil, which Bin Laden calls
“the greatest disaster to befall the Muslims since the death of the Prophet Muhammad.”

Bin Laden cites this perceived impotence along with the “suspension of Islamic law and
replacement thereof with man-made laws” as reasons why the Sa‘udi regime has
“desecrated its legitimacy.” Therefore, Bin Laden calls on Muslims everywhere to
“raise the banner of jihad up high against the Judeo-American alliance that has occupied
the holy places of Islam.” He then cites various hadiths and Qur‘anic verses reminding
Muslims of their eternal reward for fulfilling their obligation to participate in jihad during
their time on earth.

Bin Laden’s 1998 fatwa announcing the formal creation of al-Qaeda and jihad
against the United States contained similar themes. Due to criticism that Bin Laden
himself lacked the necessary scholarly credentials to declare jihad, the fatwa was also
signed by Ayman al-Zawahiri, as well as the leader of Egypt’s al-Gamaa al-Islamiyya,
the secretary-general of the Jamaat-e-Ulema of Pakistan, and a leader of the opposition in
Pakistan’s National Assembly in an attempt to bolster its credibility.

198 Osama Bin Laden, “A Declaration of Jihad against the Americans occupying the Land of the Two Holy
199 Ibid., 28.
201 The formal name of the organization known as al-Qaeda is the “World Islamic Front for Jihad Against
the Jews and Crusaders.”
202 Bruce Lawrence, ed., and James Howarth, trans. Messages to the World: The Statements of Osama Bin
Laden (New York: Verso, 2005), 58.
The *fatwa* proclaimed that the numerous “American crimes and sins” around the world were tantamount to a “clear proclamation of war against God, his Messenger, and the Muslims.”\(^{203}\) It also claimed that since “religious scholars throughout Islamic history” – and bin Laden specifically cites Ibn Taymiyya – “have agreed that *jihad* is an individual duty when an enemy attacks Muslim countries,”\(^{204}\) then it was an “individual duty incumbent upon every Muslim in all countries…to kill the Americans and their allies – civilian and military.”\(^{205}\)

In a 1998 interview with al-Jazeera, bin Laden was asked why his call to *jihad* seemed to go against the tendency of other Islamic movements at the time which had started to shift towards involvement in the democratic process. Bin Laden answered by expounding on his justification for *jihad*, and explaining why he believed it was obligatory for all Muslims to fight the “Crusader-Jewish alliance”:

>We believe that *jihad* is now an individual duty incumbent on our *umma*, but we have to distinguish between the judgment itself and the ability to carry it out…but the question remains: who defines what the right conditions are? Should it be those who have relied on the world, or those who have taken no share in legal knowledge?...As for this widespread idea among Muslims today that now is not the time for *jihad*, then this idea…is wrong. Many scholars say that now is not the time for *jihad*, [but] unless they can justify this they are quite wrong. And if *jihad* is decreed to be an individual duty today, then we are obliged to strive with all our might to complete the preparation and the necessary conditions for it…the Sheikh of Islam ibn Taymiyya makes it clear in this regard that he who issues a juridical decree regarding *jihad* is he who has knowledge of the legal aspects of religion, who has knowledge of *jihad* and when it should be waged. In other words, he should wage *jihad* himself.\(^{206}\)

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\(^{204}\) Bin Laden’s close associate and mentor, Abdullah Azzam, cited this passage from Ibn Taymiyyah on the subject of individual obligation for *jihad* in “The Defense of Muslim Lands, The Most Important Duties of an Individual”:

"أما إذا أراد العدو الهجوم على المسلمين فإنه يصير ذمه واجبا على المتقون وكلهم وعلى غير المتقون..." (http://www.alfida.jeeran.com/aldefa.htm)

\(^{205}\) Bin Laden, “Declaration of the World Islamic Front,” in Lawrence, 61.

Nevertheless, Bin Laden’s exhortations to *jihad*, especially his instruction to wage *jihad* against all Americans regardless of military versus civilian distinctions, differed substantially from those of past scholars. In a revealing October 2001 interview with al-Jazeera reporter Taysir Alluni, Bin Laden was pressed as to how he can justify his attacks, which killed innocent women and children, in contradiction of the ruling of many renowned Islamic legal scholars. Bin Laden countered by citing scholars who support his position, including Mufti Nizamuddin Shamzai, a senior Sunni Muslim cleric in Pakistan, who issued a fatwa against the U.S. after its invasion of Afghanistan.

In response to the question of attacks that kill innocent civilians, which contradict the Prophet’s forbidding of killing women and children, Bin Laden answered that killing American civilians was simply “an eye for an eye” to revenge the innocent civilians and children that Bin Laden claims were killed by the “Crusaders” in Palestine and Iraq. This, according to Bin Laden, is “valid both religiously and logically.”\(^{207}\) When challenged by Alluni about the religious legitimacy of this argument, Bin Laden responded that “this forbidding of killing children and innocents is not set in stone, and there are other writings that uphold it.” He then cites the Qur’an: “And if you punish (your enemy, O you believers in the Oneness of God), then punish them with the like of that with which you were afflicted….”\(^{208}\) However, in the pattern of those before him who have sought to justify their politicized declarations of *jihad*, Bin Laden cites the Qur’an and *sunna* selectively – he neglects to mention that the verse concludes, “but it is best to stand fast.”

He goes on to note that many “scholars and people of knowledge,” including Ibn


\(^{208}\) 16:126.
Taymiyya, taught that “if the disbelievers were to kill our children and women, then we should not feel ashamed to do the same to them.”

Conclusion: The U.S. Government’s Understanding of Jihad and the War of Ideas

Bin Laden’s invocation of jihad as a method to justify his war against the United States and the West is not a contemporary development. His selective quotation of sacred texts, Muhammad’s example, and Islamic jurists and scholars to support a militant position may be presented as a new innovation, but it is in fact just the most recent chapter in a story that began with the first generation of Muslims. In fact, the inconclusive nature of the references to jihad in the Qur’an and sunna have left the term open to nearly 1400 years of chronic appropriation and manipulation by political actors to justify military conflicts, revolutionary worldviews, and political objectives.

There is, however, still plenty of relevance to the ongoing debate over the meaning and usage of jihad. One very important question is how the U.S. government has understood the meaning of jihad since September 11, and how it has incorporated that meaning into policymaking in the War on Terror. The 9/11 Commission report, ostensibly the U.S. government’s authoritative account of the history of al-Qaeda and the road to 9/11, mentioned the word jihad or its derivatives 126 times, but surprisingly offered no definition or explanation of the meaning of jihad beyond a generic (and inaccurate) reference to its translation as “holy war.”

209 Bin Laden, interview by Taysir Alluni, in Lawrence, 118.
In a 2005 speech, President George W. Bush referred to “militant jihadism,” which he explained was an “evil ideology” that was “very different from the religion of Islam.” Terrorists, according to President Bush, “distort the idea of jihad into a call for terrorist murder against Christians and Hindus and Jews – and against Muslims…who do not share their radical vision.” President Bush did not explain what he believed jihad actually meant – he simply concluded that the “real” jihad must be different from al-Qaeda’s conception of the term.

In 2006, Dr. Douglas Streusand of the Marine Corps Staff College was interviewed by National Public Radio. He had written a memo recommending that the U.S. government completely remove the word jihad from its official lexicon when discussing the War on Terror. Doing so, Dr. Streusand argued, would have a twofold benefit – it would eschew the need for U.S. officials to attempt a difficult and complex explanation of the history of how the term jihad has evolved over time, and it would also deny terrorists religious legitimacy by even using the term in reference to their actions. “The term jihad generally means…striving in the path of God. And simply by its very definition, striving in the path of God is a good thing to do. If we are calling [terrorists] people who strive in the path of God, in other words if we are calling them meritorious Muslims, then we are implying that we are fighting Islam, even if we’re saying that we’re not.”

By January 2008, the Department of Homeland Security and the State Department had implemented Dr. Streusand’s recommendations, which had been echoed by many American Muslim advisors and groups consulted by the department. New guidelines

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released by the DHS’s Office for Civil Rights and Civil Liberties announced that
“terminology should…avoid helping the terrorists by inflating the religious bases and
glamorous appeal of their ideology.” The memo suggested that “even if is accurate to
reference the term [jihad]…it may not be strategic [to do so] because it glamorizes
terrorism, imbues terrorists with religious authority they do not have, and damages
relations with Muslims around the globe.”213

A March 2008 memo from the Extremist Messaging Branch of the DHS’s
National Counterterrorism Center recommended that government spokespersons should
“never use the terms ‘jihadist’ or ‘mujahideen’ in conversation to describe
terrorists…calling our enemies ‘jihadis’ and their movement a ‘global jihad’
unintentionally legitimizes their actions.” The memo also urges officials to “avoid using
terms drawn from Islamic theology in a conversation” including the terms “salafi,
Wahhabi, caliphate, Sufi, or ummah.”214 The State Department followed suit in April
2008, with Condoleezza Rice reportedly forbidding the public use of the terms “jihad” or
“jihadist” by any State Department official.215 216 Rather than understand and explain the
origins, evolution, and usage of the term jihad to the American people, the U.S.
government appears to have decided to simply stop using the term altogether. Polls have
shown that Americans already admit to a broad ignorance about the basic tenets of Islam

Define the Terrorists: Recommendations from American Muslims,” January 2008,
214 U.S. Department of Homeland Security: National Counterterrorism Center Extremist Messaging Branch,
“Words That Work and Words That Don’t: A Guide For Counterterrorism Communication,” March 14,
215 Robert Spencer, “New State Department lexicon forbids use of the words ‘jihad’ or ‘jihadist,’”
March 31, 2009).
216 Editorial, “‘Jihad’ Newspeak,” New York Post, May 1, 2008,
http://www.nypost.com/seven/05012008/postopinion/editorials/jihad_newspeak_108969.htm (accessed
March 31, 2009).
– a Washington Post-ABC News poll in April 2009 found that 55 percent of Americans said that they lacked “a basic understanding of the teachings and beliefs of Islam.”\textsuperscript{217} The policy of removing discussion of \textit{jihad} and other Islamic terms from public government statements will cause even more confusion and uncertainty in the American public as to the meanings of these terminologies when they are used by Islamist militants – or, even worse, left to believe that the militants’ usage of these terms is accurate and legitimate.

This decision could be a devastating strategic mistake. The War on Terror, as counterterrorism officials such as former Undersecretary of State James Glassman have admitted, will be won not on the military battlefield, but rather on the ideological one.\textsuperscript{218} The 2006 National Strategy for Combating Terrorism stated plainly that “In the long run, winning the War on Terror means winning the battle of ideas.”\textsuperscript{219} Drawing parallels to Cold War-era strategies aimed at discrediting communist ideology, officials like Undersecretary Glassman have recognized that the goal of this “war of ideas” is to “confront the ideology that justifies and enables the violence.” While the effectiveness of this effort will depend largely on efforts to enable credible Muslim voices to speak out against these ideologies, Glassman warns that “we ourselves [the U.S. government] should not shrink from confidently opposing poisonous ideas – even if they are rooted in a distorted and twisted interpretation of religious doctrine.” The United States should be actively engaging in ideological warfare with militant ideas promoted by groups like al-Qaeda – not attempting to ignore or downplay their significance by removing words with


any religious connotation from our official discussion of terrorism and counterterrorism. Such a policy, however well-intentioned, will prove counterproductive in our efforts to win the war of ideas.

The United States has an excellent opportunity to exploit a significant vulnerability in the ideology of militant Islamist groups. By understanding the historical, religious, and political significance of Islamic terms like *jihad* (as well as others mentioned throughout this paper), the U.S. government can show how these terms have been manipulated by political actors throughout history, undermining the militants’ claims that their ideas are based on religious authenticity. The Ottoman Empire’s calls for *jihad* against the Allied powers during World War I were largely ignored by Muslims because they were seen as transparently political and opportunistic. There is no reason why the same perception of illegitimacy cannot be fostered with regards to the calls to *jihad* made by modern militants like Osama Bin Laden.

There are several ways in which the United States government can implement such a strategy. Counterterrorism expert Daniel Byman notes that the United States has been steadily losing the war of ideas in the context of the broader War on Terror. Winning the “hearts and minds” of Muslims around the world is a stated goal of the U.S. government, but to date American efforts on this front have produced very few results. One reason for this, according to Byman, is that “we do not integrate the war of ideas into our actual policy decisions.” The undersecretary of state for public diplomacy, who is ostensibly tasked with formulating the American information strategy, must compete with a “wide range of diplomatic concerns” and is forced to “spin policy decisions” after
they are made, rather than taking worldwide perceptions of policy choices into considering beforehand.220

Byman also concludes that since efforts to “sell America” have been ineffective, the U.S. should instead be focusing on damaging the popularity of the militants in the eyes of the Muslim world. “Our goal is not to be loved,” Byman explains, but “to make the jihadist hated” – or at least more hated than the United States.221 The U.S. can achieve this goal by “focusing on violent excesses” committed by terrorist groups, especially highlighting the victims of terrorism, which are predominantly Muslim and often women and children.222 This tactic can have a significant impact on reducing popular support for these groups by exposing the way in which militants have appropriated jihad as a political tool to justify the slaughter of innocents. A concerted campaign to increase the negative perception of militant Islamist groups can weaken these groups – even if it does not immediately translate into more positive views of the United States in the Islamic world. It puts militants on the defensive ideologically, forcing them to “defend…their own violence and organizational pathologies” rather than “U.S. support for Israel” or other unpopular American foreign policy decisions.223

Terrorism expert Walid Phares notes that “all it [would take] for Americans and other democracies to defeat their foes is to understand who that foe is and what it wants to do.”224 If the United States and its allies were to focus on directing their political and diplomatic energies at waging this ideological battle – instead of ignoring its existence

221 Ibid., 190.
222 Ibid., 185.
223 Ibid., 187.
and significance – it would “lead to an isolation and marginalization of the radicals.”

Without an effort to undermine the credibility of leaders like Osama bin Laden and challenge the legitimacy of militants’ calls for violent *jihad* against the U.S. and the West, the War on Terror will never be won. Military operations, diplomacy, and economic development will continue to be a part of the United States’ counterterrorism efforts, but without adequate comprehension of the ideological dimension of this conflict, victory will always be out of reach. Understanding the origins, evolution, and history of *jihad* – especially how it has been utilized for political purposes throughout Islamic history – is a vital prerequisite for the success of the United States government’s ongoing counterterrorism efforts.

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225 Phares, 175.
Bibliography


