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# THE ISLAMIC STATE'S STRATEGY

## Lasting and Expanding

Lina Khatib

JUNE 2015



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## About the Author

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Khatib has published seven books, including *Image Politics in the Middle East: The Role of the Visual in Political Struggle* (I. B. Tauris, 2013), *Taking to the Streets: The Transformation of Arab Activism* (co-edited with Ellen Lust, Johns Hopkins University Press, 2014), and *The Hizbullah Phenomenon: Politics and Communication* (co-authored with Dina Matar and Atef Alshaer, Hurst/Oxford University Press, 2014). Her published journal articles include "Qatar's Foreign Policy: The Limits of Pragmatism," "Public Diplomacy 2.0," and "Hizbullah's Political Strategy."



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## Summary

The self-proclaimed Islamic State is a hybrid jihadist group with a declared goal of establishing a “lasting and expanding” caliphate. Its strategy for survival and growth blends military, political, social, and economic components. Yet the U.S.-led international intervention against it has largely been limited to air strikes. The gaps in the international coalition’s approach as well as deep sectarian divisions in Iraq and the shifting strategies of the Syrian regime and its allies are allowing the Islamic State to continue to exist and expand.

### Understanding the Islamic State

- The Islamic State faces significant internal challenges, including grievances about its brutality and unpredictable ruling behavior, a limited governance capacity, and tensions between foreigners and locals within its ranks.
- The Islamic State’s military approach has evolved over time, from an emphasis on offensive warfare to more defensive operations and, more recently, to attempts to take advantage of its enemies’ political and military weaknesses, as it did in mid-2015 with advances in Palmyra in Syria and Ramadi in Iraq.
- On the socioeconomic and political levels, the Sunni extremist group is benefiting from two powerful dynamics: the continuation of the Syrian conflict and anger among Iraqi Sunnis at Baghdad’s systematic exclusion of them.

### How Regional Actors and the West Can Combat the Islamic State

**Exploit the Islamic State’s weaknesses.** The West and its allies should take advantage of the internal challenges facing the jihadist group in order to weaken it from within.

**Move beyond air strikes.** Military engagement against the Islamic State must not be limited to the air. It should also encompass ground operations by Syrian and Iraqi military groups that coordinate with the international coalition.

**Support the moderate opposition in Syria.** The West and its allies must strengthen the operational and governance capacities of the Free Syrian Army’s Southern Front, the only moderate opposition coalition that is fighting both the Islamic State and the regime in Syria.

**Establish an Iraqi national guard.** A multisectarian, multiethnic force would help restore the Sunni community's trust in state institutions and widen local engagement in the fight against the Islamic State.

**Push Turkey to play a bigger role.** Turkey should allow the international coalition's aircraft to use Turkish bases, which would better enable them to reach targets inside Syria.

**Find a solution to the Syrian conflict.** The West and its allies should begin negotiations about a political settlement for Syria because the Islamic State cannot be eradicated without one.

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## Introduction

The rise of the self-proclaimed Islamic State in Iraq and Syria (also known as ISIS and ISIL, for the Islamic State of Iraq and the Levant) has signaled the start of a new jihadist era. The Islamic State has declared a long-term goal, which is to establish an Islamic state, or a caliphate, based on an extremist interpretation of sharia, making it more than just a terrorist organization despite its origins as an offshoot of al-Qaeda in Iraq.

The Islamic State is a hybrid jihadist group. It has appropriated the radical Islamist ideology of al-Qaeda while implementing the centralized command model of the paramilitary Hezbollah and some tactics from the Taliban's local governance structures.

Its strategy for survival and growth has relied on a number of components: pragmatism regarding the Syrian regime; the control and development of territories as a method of commanding local populations and attracting foreign fighters; the use of ideology and the media as tools to control populations, recruit fighters, and raise funds; and a centralized military strategy.

Since its expansion into Syria in 2013, the Sunni extremist group has been engaged in an existential battle with al-Qaeda. And, with all of its strategic tools, the Islamic State has presented itself as the “true” al-Qaeda, asserting that it is making al-Qaeda's ideological goal of an Islamic state a concrete reality, which provides a cloak of authenticity that has appealed to donors and recruits.

But although ideology plays an important role in how the Islamic State operates, the organization's strategic objectives are not driven by ideology but instead revolve around the acquisition of money, resources, and power. Establishing a caliphate in Iraq and Syria is therefore the beginning, not the end, for the group—the clue to the Islamic State's long-term aims lies in its slogan, “lasting and expanding” (*baqiya wa tatamaddad*). However, this does not mean simply the indefinite geographical expansion of the caliphate's physical boundaries, but also the expansion of its global influence in order to support the viability of the state project.

The declaration of the establishment of a caliphate in June 2014 following the Islamic State's advances in Iraq drew international intervention in the form of a U.S.-led coalition to fight against the group. The air strikes that followed posed a direct challenge to the Islamic State's ability to be lasting and expanding. However, this intervention has been confined in scope and faces several

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**The rise of the self-proclaimed Islamic State in Iraq and Syria has signaled the start of a new jihadist era.**

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hurdles. A key reason for this weakness is the coalition's focus on limited military attacks, which overlooks the political, social, and economic components of the Islamic State's strategy.

Meanwhile, the Islamic State is confronting a number of challenges that are pressuring it to modify its theater-level operations. Faced with internal tensions

resulting from its methods of governance and its ongoing attempt to unify members with diverse ethnic and national backgrounds under a single umbrella, the militant group is turning inward, biding its time until it manages to rear a new generation of loyalists who would form the first "indigenous" citizens of the caliphate.

In doing so, the Islamic State has shifted from proactive operations to those that take advantage of opportunities that result from its opponents' weaknesses. Those weak-

nesses relate to the absence of both an adequate solution to sectarian tensions in Iraq and a comprehensive solution to the Syrian conflict. As long as those weaknesses persist, the Islamic State is likely to continue to last and expand, as it did in mid-2015 with advances in Palmyra in Syria and Ramadi in Iraq.<sup>1</sup>

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## Components of the Islamic State Strategy

The strategy used by the Islamic State is diverse and is based on pragmatism as well as the merger of military, media, and socioeconomic operations. This has given the Islamic State an edge over other Islamist groups in Syria and Iraq.

### Pragmatic Relationship With the Syrian Regime

The Islamic State and the Syrian regime mutually benefit from one another, and consequently the relationship between the two has been largely pragmatic. The regime of Syrian President Bashar al-Assad has been an economic client for the Islamic State as well as an indirect facilitator of its military activities, while the group helps to validate Assad's narrative that he is fighting Islamist extremists, an approach he has been using since the beginning of the Syrian uprising in 2011 to discredit the Syrian opposition. The Islamic State is also useful for Assad because it serves as a tool to counter the regime's enemies, including both the Free Syrian Army (FSA)—a collection of moderate rebel fighters—and groups like Jabhat al-Nusra, the al-Qaeda affiliate in Syria that was created to fight the regime.

The Islamic State first arose in Syria in areas that the regime had lost to the opposition but which were far from the front lines. Opposition groups did not have a big military presence in those areas—and in most cases were instead focused on fighting the regime elsewhere—making them ideal for the Islamic State. The regime did not prioritize retaking these areas because Assad

apparently calculated that allowing the Islamic State to operate in them and fight against the Syrian opposition and Jabhat al-Nusra would weaken his opponents, and that once the opposition was eradicated, the regime would be able to control the Islamic State.<sup>2</sup> In doing so, Assad counted on presenting himself to the West as a counterterrorism partner. The Islamic State in turn did not prioritize fighting the regime, believing that it could easily overwhelm it in the future, and concentrated instead on building its state-within-a-state.<sup>3</sup>

The absence of front lines with the Islamic State gave the regime an excuse not to fight it and gave the militant group the ability to hold areas and recruit local and foreign fighters. The lack of fighting also encouraged many Syrians to move to areas controlled by the Islamic State in the pursuit of security rather than ideology. This came at a time when the Syrian opposition was badly fragmented due to both political disagreements and the lack of a viable military strategy.

The Islamic State took hold of resource-rich areas, beginning in mid-2014 with the northern governorate of Raqqqa, and eventually became financially self-sufficient in Syria by selling oil, wheat, and water; demanding ransom for kidnapped foreigners; and imposing taxes on local populations.<sup>4</sup>

The Syrian regime has been a key economic partner for the group, which has been selling oil from its wells in Syria at discounted prices to the regime. Although the Islamic State has also sold oil to both the FSA and Jabhat al-Nusra, which in turn facilitated and benefited from the sale of oil on the black market in Turkey, this activity has been greatly reduced due to Turkey's increased monitoring of activities on its border with Syria. The regime, however, remains a key client.<sup>5</sup>

Syrian government forces began attacking areas controlled by the Islamic State in June 2014, after the group's expansion in Iraq threatened to destabilize Shia areas close to Assad's ally, Iran. But most of the Assad regime's military engagement has been directed at the Free Syrian Army. In November 2014, a report by Jane's Terrorism & Insurgency Center revealed that until that point, only 6 percent of the regime's attacks that year had been directed at Islamic State targets.<sup>6</sup>

The pragmatic relationship between the Islamic State and the Syrian regime continued despite the latter's bombing of Raqqqa in late 2014. They still appear to coordinate on the provision of services like electricity, with the militant group controlling a number of dams on the Iraq-Syria border and the regime continuing to pay most of the salaries of state employees residing in Islamic State-controlled areas.<sup>7</sup>

The regime's pragmatism can also be seen in its passivity toward the group's movements in areas with significant opposition presence. The regime did not stand in the way when Islamic State fighters approached the Qalamoun

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Mountains on the Syrian-Lebanese border to fight the Free Syrian Army in the area in 2014. It also did not interfere in early 2015 when the Islamic State took over the Yarmouk refugee camp near Damascus—and fought antiregime groups during the attack.<sup>8</sup> A similar scenario occurred when the Islamic State attacked the ancient desert city of Palmyra in May 2015, although unlike in Yarmouk, there was not a significant opposition presence in Palmyra. In mid-2015, direct confrontations with the regime remained limited to areas like Rif Hama, the Haql al-Shaer oilfield, the eastern province of Deir Ezzor, and, since May 2015, Aleppo, Syria's largest city.

At the same time, the Islamic State has avoided attacks on certain regime areas because they lie between its territories and those controlled by its rival Jabhat al-Nusra, thereby forming a buffer zone between the two groups. The Islamic State has tried to avoid having front lines with Jabhat al-Nusra because they both regard fighting one another as a distraction from their main goals (building the caliphate for the former and fighting the regime for the latter). This was evident in east Hama as well as at the regime-controlled Abu al-Duhur military airfield on the Idlib-Aleppo border in northwestern Syria. Neither group has attempted to storm the airfield since Jabhat al-Nusra's failed attempt in January 2015, when its advance resulted in a high number of casualties at the hands of regime forces, leading the group to halt its operation in the village of Tal Salmo on the outskirts of the area.<sup>9</sup>

However, the takeover of Idlib in April 2015 by the rival Jaysh al-Fateh rebel coalition, of which Jabhat al-Nusra is a major member, and the expansion of its attacks northward toward Aleppo, upstaged the Islamic State. Consequently, beginning in May 2015, the Islamic State increased its own attacks on regime areas in Aleppo and engaged in some military confrontations with Jaysh al-Fateh.

But this change in the dynamic between the Islamic State and the regime does not signal that the pragmatism between them is beginning to unravel. The regime has still not been putting up a serious fight against the Islamic State because ultimately, if the group eliminates other Islamist factions and the only remaining major players in Syria are the Assad regime and the Islamic State, the former will be able to appeal to the international community for support. The Islamic State, for its part, seems to base its calculations on being able to overwhelm the regime eventually.<sup>10</sup>

### **Area Control and Development**

Unlike al-Qaeda, which is a terrorist group whose ultimate goal is to establish an Islamic emirate in the Middle East in the undefined future, the Islamic State presents a clear project, which is the immediate establishment of a caliphate. While al-Qaeda has always aimed to dismantle existing power arrangements (Western states, the Syrian regime) without offering a concrete alternative, the Islamic State goes a step further, offering a vision for a state system that replaces the status quo.

The pursuit of this political project has appealed to significant swathes of people in the Middle East and outside the region, and given Islamic State sympathizers a tangible goal to seek to achieve.<sup>11</sup> When one foreign fighter in Raqqa was asked why he was not engaged in jihad close to his original home, he replied, “Because the real Islamic State is here.”<sup>12</sup>

#### *Local Buy-In*

The Islamic State needs local buy-in to establish its rule, and therefore it follows the “clear, hold, build” formula—often also associated with the operational model of the U.S. Army but which also applies to Hezbollah—in its appeal to local populations. The group takes hold of land, particularly areas rich in resources like oil and water, and cities, where it can eventually impose taxes, and engages in “purification” of those areas from other Islamist groups,<sup>13</sup> after which it begins to implement a governance structure.

The provision of services is a key tool through which the Islamic State initially appeals to people in its areas of command, and it has sometimes dismantled existing institutions and sought to implement its own state structure by establishing courts, police, and schools and imposing sharia law.<sup>14</sup>

In Raqqa, it has taken advantage of the Syrian regime’s policy of continuing to allow essential state services to reach the local population and of its practice of continuing to pay the salaries of civil servants, to save itself from the financial and administrative burden of supplying those services directly.<sup>15</sup> In contrast, the Islamic State sees external providers of services, such as international and local humanitarian organizations, as infiltrators who threaten its security.<sup>16</sup>

The Islamic State sometimes appropriates schools and other institutions, giving those working within them the “option” of keeping their positions, but under its control.<sup>17</sup>

Control over education supports the Islamic State’s long-term vision of ensuring automatic compliance with its strictures in areas under its rule. The Taliban has been trying to achieve that in Afghanistan by replacing schools with “religious” institutions and preventing women from receiving an education. This approach aims at producing a largely illiterate and uneducated population that would be easier to control further down the line as generations die and new ones are raised within this constrictive ideology. The Islamic State has a somewhat similar goal but with modified tactics, taking over state and non-state institutions and infusing them with its propaganda<sup>18</sup> with a view toward nurturing a whole new and compliant generation. In Raqqa, the Islamic State reopened 24 schools—twelve for boys and twelve for girls—which offer a new curriculum that has been approved by the group. Islamic State “religious courses,” in reality indoctrination courses of two to six months, are also offered to teenagers and adults and are a requirement for all new fighters.<sup>19</sup>

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In its engagement with local populations, the Islamic State has benefited from the prolonged brutality of the Syrian conflict and from the grievances of Iraq's Sunni population toward the Iraqi government.<sup>20</sup> In Syria, as with the Taliban in Afghanistan, the Islamic State emerged from the socioeconomic context of a population that had been exhausted by years of war and reduced to the pursuit of basic needs. The violence of the war, especially as a result of the regime's policies, deflected people's attention away from demands for democracy, freedom of expression, freedom of movement, and politics, as large numbers of Syrians became consumed with mere survival.<sup>21</sup>

This helped make the Islamic State appear to be an organization that was restoring order—and boosted its appeal to local populations. The group's take-

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over of Raqqa and the other areas where it claimed early victories came after those areas had been controlled by different opposition groups, a period that exposed residents to practices like taxation, looting, the occupation of houses, and other forms of corruption. An example is the case of Hassan Jazra, a known criminal who, due to his personal connections, had been acquitted by an Islamic court set up by an Islamist opposition group in Aleppo. After the Islamic State took control of areas of the city in late 2013,

Jazra and nine members of his gang were executed by the jihadi group, an act that garnered widespread popular support.<sup>22</sup>

In Iraq, the Islamic State capitalized on Sunni anger at former prime minister Nouri al-Maliki's systematic political and economic exclusion of Sunni areas, which led those regions, heavily populated by tribes, to feel detached from the central state.<sup>23</sup>

The United States provided equipment to the Iraqi army following the 2003 U.S. invasion, but that support was not coupled with good governance measures to ensure accountability. This left the door open for corruption and discrimination against many of Iraq's communities, especially the Sunnis. Iran's influence on the Iraqi government exacerbated the sectarian divide, as did the Islamic Republic's backing of the creation of Shia militias in Iraq to fight the Islamic State.

The Islamic State has tapped into these tensions, presenting itself as a tool of vindication for Sunnis. In its media and face-to-face outreach, the group uses the narratives of Sunni humiliation and discrimination, as well as the goal of bringing the world back to the "correct" path of Islam by fighting apostates (those who pledged allegiance to the Islamic State and later defected), infidels (including Christians and other minorities), traitors (Sunnis who do not support the group), and *rafidha* (a discriminatory Sunni reference to Shia).<sup>24</sup>

The Islamic State's advance on Mosul in June 2014 was met with little resistance from an Iraqi army whose Sunni soldiers did not feel much sense of belonging to Iraq as a state. The Iraqi government's support for the creation

of more Shia militias—including those who lost the battle for the central city of Ramadi in May 2015—has only deepened sectarian tensions and helped to maintain the group’s strong ties with Sunni tribes. For this reason, it is in the Islamic State’s interests for sectarian strife to be sustained in the Middle East.

### *Enticement, Then Brutality*

Many members have joined the Islamic State out of economic interest. In Syria, for example, some FSA fighters left their \$60 per month positions to join Jabhat al-Nusra, which offered them \$300 a month, and later joined the Islamic State, which offered them even higher salaries.<sup>25</sup>

The Islamic State also seeks to increase its population by attracting foreign recruits, not just to become fighters but also residents. Foreigners are attractive because they often possess skills that would enable the group to realize its goal of establishing a lasting state. Foreign recruits like technocrats are therefore offered higher salaries than local recruits (reportedly \$1,200 a month and \$400 a month respectively, in addition to family benefits).<sup>26</sup>

But economic need is only part of the reason for joining. Many become members in pursuit of a higher aim, a sense of identity, and power. For ordinary individuals in the Middle East or elsewhere, the Islamic State provides an opportunity to become extraordinary almost overnight.<sup>27</sup> This cultlike appeal has managed to attract people from 80 different nationalities.<sup>28</sup> In interviews with members of the group in Tunisia, the largest source of foreign fighters in Syria, whole families were reported to have moved to the self-proclaimed caliphate in pursuit of what they said was an “authentic” Islamic way of life following decades under a secular regime.<sup>29</sup>

East of Raqqa, such as in western Deir Ezzor, the Islamic State has been able to expand through alliances with tribes and the local populations. When the group first entered areas of Aleppo, its fighters distributed food parcels. Such enticement has helped to establish deep ties with locals and cultivate a sense of legitimacy for the Islamic State that may enable it to survive in the long term.

But enticement is only the initial phase of the Islamic State’s approach to governing new areas. Once the group establishes its presence, those who have lived under its control say it begins to systematically intimidate the population to keep it in check.<sup>30</sup> In interviews with residents of Raqqa, it became clear that the Islamic State has been increasing the level of brutality used in dealing with the local population and forcing its compliance. For example, schoolteachers were sent written notices to report to the group’s offices to repent for teaching an “infidel” curriculum. Those who did not respond were subsequently threatened that their homes would be destroyed if they did not comply.<sup>31</sup>

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While there are signs that popular resentment of the Islamic State is growing,<sup>32</sup> ordinary people who live in areas under its control lack the capacity to resist its force. And because the Syrian regime has largely stopped renewing passports, many people who would like to leave those areas to go abroad are no longer able to do so.<sup>33</sup>

### Co-Opting Tribes

The Islamic State also took advantage of weak ties between tribes and the central states in Syria and Iraq, courting tribes in neglected districts with negotiations and money in order to cement its control of their areas.

In Syria, Assad's neoliberal economic policies focused on key urban centers and largely ignored rural areas, leading to simmering grievances in the rural east.<sup>34</sup> In the Raqqa Governorate, now the headquarters of the Islamic State, there was not a significant Syrian state security presence in tribal areas beyond the army bases around the city of Raqqa. Instead, although tribes had pledged allegiance to the regime, they were responsible for their own security.<sup>35</sup> This level of independence increased following the start of the Syrian crisis.

In some respects, the 2011 uprising was as much about young Syrians' rejection of traditional tribal leaders as it was their dissatisfaction with the regime. But the rise of the Islamic State resuscitated the role of elder tribal leadership, which the group relied upon to weave its network of power on the ground.<sup>36</sup>

Another factor that helped the Islamic State to form local alliances is that tribes and clans often ally themselves with the strongest actor in the pursuit of self-protection. In Syria, as the militant group gained prominence, many tribes saw it as stronger than the Syrian regime and shifted their allegiances accordingly.

In Iraq, many Sunni tribes supported the Islamic State's advance as a measure of revenge against the government. Some tribes accepted the group as a defense against the advance of the Shia militias that replaced the army. Others, in disputed territories near Kurdistan, saw the Islamic State as a means to counter Kurdish aspirations over their territories. Yet others accepted the Islamic State as a way to fight against Sunni tribes that were being co-opted by the central government in Baghdad; this was the case in Anbar, where the Iraqi government has struggled to get Sunni tribes to cooperate with it against the Islamic state.<sup>37</sup>

However, a number of tribes have begun to see the Islamic State as detracting from the authority that they used to enjoy under the regime. For example, according to one tribal leader, with the arrival of the Islamic State, the tribes no longer collect the taxes that they used to impose on people.<sup>38</sup>

A number of tribes—including the Bu Nimr tribe in Iraq's Anbar Province, as well as the Sheitat, the biggest tribe in Deir Ezzor—rebelled against the Islamic State in 2014. An estimated 700 members of the Sheitat were executed by the Islamic State following their August 2014 rebellion, while the rest of the tribe's members were kicked out of their areas. (By December 2014, 230

bodies had been documented, and a few hundred more people were reported missing.)<sup>39</sup> The Islamic State reportedly justified its actions by saying that the tribe had been selling oil from the area's wells for private gain and accusing its members of being apostates.<sup>40</sup>

As the case of the Sheitat illustrates, in areas where the Islamic State has faced widespread local resistance, it has worked to empty those areas of their original residents and to repopulate them with foreign *muhajireen* (migrants). The absence of local resistance can help the group to establish roots in those areas both now and in the future.

### Propaganda as a Military Tactic

The Islamic State has garnered much attention for its use of propaganda, particularly its releases of videos of violent acts, its publication of an online magazine and several pamphlets and booklets, and its use of social media. Propaganda is both a tool of recruitment for the organization and a tool of war that is often used to supplement military action, and sometimes to compensate for it.

#### *Social Media*

The Islamic State is not recognized as legitimate by any state in the world, and it must rely on existing communication channels such as social media in order to publicize itself, intimidate enemies, and recruit members.<sup>41</sup> Just as al-Qaeda in 2001 exploited the media's desire for news scoops, the Islamic State uses the international media's reproduction of its messages as indirect tools to promote the organization.

However, unlike al-Qaeda, the Islamic State follows a strict formula in dealing with the media. It is very specific about where it promotes itself and how. For example, until Twitter closed down its accounts in August 2014, the group had set up individual accounts for each *wilaya* (protectorate) it controlled. Through those accounts, the Islamic State promoted its development work, such as the opening of schools and the completion of road projects.<sup>42</sup> This focus on services aimed at cultivating a sense of legitimacy for the Islamic State by presenting the group as a provider for Muslims in need. The Islamic State continues to use Twitter as a method of outreach, constantly creating new accounts when others are shut down.<sup>43</sup>

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#### *Psychological Warfare*

The Islamic State regularly disseminates graphic images of violence that are a form of psychological warfare aimed at instilling fear among its enemies and constituents alike. The group chooses to release information according to need and to changes in the local context. For example, if it senses that a local population is starting to get restive, it disseminates more propaganda about its development

initiatives, and if it senses a growing potential for political or military challenges, it releases more brutal images in order to instill fear in its opponents.

High-cost, higher-return tactics have helped the group to achieve both military and propagandist gains at once, with what has sometimes been referred to as “propaganda of the deed.”<sup>44</sup>

That was the case during attacks in Syria's Raqqa Province in the summer of 2014. In one instance, a suicide bomber attacked the gate at the base that was home to the Syrian Army's Seventeenth Division, creating an entry point for a second suicide bomber, who attacked the headquarters inside. Soon after gaining access to the base, the Islamic State decapitated the base commander. Within the hour, this achievement was announced over loudspeakers as the battle was raging, and images of it were immediately released on Twitter. This lowered morale among the base's 700 soldiers and helped the Islamic State to take over the base.<sup>45</sup>

The same tactic was used in an attack on Raqqa's Tabqa airport, where the heads of dozens of regime soldiers were hung in public spaces as a way of instilling fear in the enemy and showing off to potential and existing recruits as well as the local population.<sup>46</sup> Following a massive promotion campaign through social media, the Islamic State compensated for the few hundred fighters it lost in the Tabqa battle and other battles in 2014 with 6,000 new fighters.<sup>47</sup>

Propaganda has also been used to help overcome military limitations. When the Islamic State was unable to expand further east because of resistance from Shia-majority areas in Iraq after its advance on Mosul, the group announced the “return” of the caliphate on June 29, 2014, and its leader, Abu Bakr al-Baghdadi, made his first public appearance, giving a sermon as the “Caliph Ibrahim” at the Great Mosque in Mosul.<sup>48</sup> With video of the sermon that was circulated around the world, the Islamic State projected to its existing and potential members an image of the *emir al-momineen* (commander of the faithful) that they could relate to—a courageous leader unafraid to appear in the biggest mosque in Mosul, which carries historical significance for Sunni Muslims. The group also used the moment to make an open invitation to technocrats like engineers and medical doctors to join in building the caliphate and launched a social media campaign aimed at boosting recruitment and funding.<sup>49</sup>

A similar pattern can be seen in the battle of Kobane, a Kurdish town in Syria near the Turkish border. Turkey was initially resistant to allowing Turkish Kurdish fighters to enter Syria to help their Syrian counterparts fight the Islamic State as it advanced toward Kobane, but it agreed to open its borders in December 2014. Consequently the Islamic State found itself trapped in the town, confronted with a stark choice: either hold ground and face this new onslaught from peshmerga and other Kurdish combatants, or flee and expose its fighters to the international coalition's air strikes. The group's first reaction to this entrapment was not a military move but a media one: British hostage John

Cantlie was made to appear in an online video in which he wandered around Kobane telling the camera that the town was dominated by the Islamic State.

As the battle of Kobane approached its end in early 2015, the Islamic State resorted once more to its tried-and-tested approach to overcoming military losses: propaganda. The group had captured a Jordanian pilot, Lt. Moaz al-Kasasbeh, who had been participating in the air strike campaign, and proceeded to parade him naked from the waist down in a video. It also released another video showing the execution of one of two Japanese hostages in its custody and staged a video statement by the other hostage in which he called for the release of Sajida al-Rishawi—an al-Qaeda affiliate who had been on death row in Jordan for nine years following a failed terrorism attempt—in return for his own safety.

The three videos drew much media attention and—after members of the pilot’s tribe protested in Amman, asking the government to work harder to secure his release—Jordan publicly agreed to release al-Rishawi in return for the Jordanian pilot. The Islamic State promptly responded by circulating videos of the executions of the second Japanese hostage as well as the pilot. In doing so, the group managed to humiliate both Japan and Jordan, two members of the international coalition against the Islamic State.

The Islamic State used propaganda to compensate for military loss once more following its defeat in the northern Iraqi city of Tikrit in April 2015, when it released videos of the destruction of the ancient archaeological site of Hatra in Iraq.

### *Centralized Media Operations*

The Islamic State is able to use propaganda so efficiently because its media operations are highly centralized, with careful control over what is publicized when. All Twitter accounts associated with the group are centrally managed. When new high-profile fighters join the Islamic State, they are pressured to hand over their social media accounts to the organization.<sup>50</sup>

Centralized control also protects the Islamic State from making errors that could prove fatal. Similar to the method used by Hezbollah,<sup>51</sup> and unlike other Islamist jihadist groups in Syria, the Islamic State does not normally photograph or film its commanders; most of their names and photographs are only revealed in the event of their death (and, while they are alive, any photographs that are circulated carry fake names). According to one militant, this means that leaders of the group who have been killed by the international coalition’s campaign have mainly not been key commanders because the latter largely remain underground and unknown.<sup>52</sup>

The Islamic State does not boast about specific military operations or their locations, keeping the videos it posts vague, likely worried that the release of some information could expose the group militarily and attract a counterattack.

The group has also leaked incorrect information about the location of planned operations and then conducted strikes elsewhere.<sup>53</sup> As such, it avoids the mistakes of other rebel groups, whose members or sympathizers have revealed sensitive military information. In one such incident in 2014, an activist sympathetic to Jabhat al-Nusra posted the details of a Nusra convoy heading from one village to another in the northwest of Deir Ezzor on Facebook, including exactly which weapons the convoy was carrying, thereby exposing it to attacks by the Islamic State and the regime.<sup>54</sup>

However, certain operations are publicized heavily, such as the execution of 250 Syrian soldiers following the takeover of Tabqa airport in Raqqa in the summer of 2014. Videos of such operations are used to show that the Islamic State is effective when other groups are not and to help with recruitment as well as lowering enemy morale.

The Islamic State also closely monitors sympathetic media, and the group has killed and kidnapped independent journalists. In rare cases, the group has attempted to brainwash journalists in its custody,<sup>55</sup> but it generally prefers to murder foreign or local reporters it does not consider friendly to its cause. On occasion, the Islamic State agreed to host foreign “embedded” journalists as a way to promote itself internationally.<sup>56</sup> However, the group was not pleased with the reports made by those journalists, saying that they misrepresented reality, and shut the door to outside reporters.<sup>57</sup> This monopoly over footage and news from areas it controls helps the Islamic State in its global recruitment by minimizing alternative frameworks to its narratives. Similar to the method used by Hezbollah, the group also closely monitors and quotes what it considers to be enemy writings about it as a way to claim epistemological superiority over its opponents.<sup>58</sup>

### **Ideology as a Tool**

The Islamic State has appropriated the ideology of al-Qaeda, but ideology is not the group's primary purpose; it is a tool to acquire power and money. The group does not follow any particular Islamic *marjaiya* (religious reference) and rejects the four sects of Islam. Instead, it continuously interprets sharia in ways that justify its actions.<sup>59</sup> As such, its ideology must be seen as an instrument for cultivating legitimacy as well as resources, and it is still evolving.

Elements of ideology are used to build ties with local populations as well as to control areas the group has seized. In Raqqa and other places, the Islamic State has used the promotion of ideology in tandem with military strategy to instill confusion. As soon as it takes over a village, and even before it has secured the area, the group often engages in actions seen as promoting sharia, such as burning cigarette supplies, destroying alcohol containers, and whipping women dressed “inappropriately.” These moves are intended to show that promoting sharia is the Islamic State's main priority and to help it cultivate legitimacy. But they are also aimed at throwing people off, because they take

place when the group might instead be expected to focus on securing newly acquired areas.<sup>60</sup>

After the Islamic State takes hold of an area and begins to govern it, the group uses sharia as an excuse to prevent members of the Syrian opposition from working and to kill those who had fought for rival Islamist brigades. These people are often arrested under the pretext that they are criminals and then crucified or subjected to similar public brutalities.<sup>61</sup> The group also conducts periodic public executions and similar grotesque acts to intimidate its constituents and make them conform enough that the need for violence against them lessens. In this way, the population under the Islamic State's control becomes self-governing, which in turn is used as "proof" that its followers are loyal. In a propaganda video produced by the Islamic State, one member is shown going around the market in Raqqa and telling the camera how people have already started closing their shops for Friday prayer without the group reminding them to do so.<sup>62</sup>

This hegemony helps the Islamic State to govern; for example, the group grants its constituents loans to open businesses, confident that it will be paid back out of fear.<sup>63</sup> And even in cases where this kind of rule becomes the norm, public executions are held periodically as a reminder of the Islamic State's power and as a tool of control.

Ideology is also used to justify the group's stance toward the Syrian regime, which it did not begin fighting until June 2014, following Islamic State victories in Iraq. Even now, only a small percentage of its military activities in Syria are directed at the regime, with most targeted instead at the Free Syrian Army and other jihadist groups. The Islamic State asserts that "*qital al-mortaddin awla min qital al-nusairiya*" (fighting apostates is a priority over fighting Alawites, the sect to which Assad belongs). It uses the same rhetoric to justify its lack of attacks on Israel; as an emir in Qalamoun put it, "*Qital al-mortaddin awla min qital al-yahoud*" (fighting apostates is a priority over fighting Jews).<sup>64</sup>

#### *Vying With al-Qaeda*

The Islamic State also uses ideology to overwhelm its enemies and justify its political strategy. It presents itself as the logical continuation of the path of al-Qaeda founder Osama bin Laden. The organization has used this constructed relationship with bin Laden to justify its disapproval of al-Qaeda's current leader, Ayman al-Zawahiri, and to declare its superiority over al-Qaeda. In one message to Zawahiri, the Islamic State's spokesperson and second-in-command, Abu Mohammed al-Adnani, argued, "You are an organization, we are a state. You have to pledge allegiance to us, not the other way around."

The struggle over legitimacy with al-Qaeda has led the Islamic State to attempt to discredit its key rival, the al-Qaeda affiliated Jabhat al-Nusra, on

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religious grounds, with the two groups engaging in a rhetorical battle, not just a military battle.

Throughout 2014, the Islamic State turned to the Islamic tradition of *mubahala*—in which one party levels a criticism at another, and the recipient must respond with an equally powerful message, or be seen as going against sharia—to complain about al-Nusra. In the Islamic State's modern approach, a typical message is sent via YouTube as an audio recording of Adnani, who is known for his charismatic delivery and well-written and deeply researched speeches, and then shared through the Twitter accounts of *wilayat*, members, and supporters.<sup>65</sup>

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**The Islamic State uses ideology to overwhelm its enemies and justify its political strategy.**

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These *mubahala* audio messages are aimed at legitimizing the Islamic State as the true al-Qaeda that is implementing its ideology concretely. The messages include declarations such as, “We are the good soldiers of al-Qaeda,” and lament rival Islamist groups like al-Nusra and Jaysh al-Islam. In one exchange, Adnani complains about Zawahiri by saying, “We treated al-Qaeda and Ayman al-Zawahiri as the soldier treats his emir, but you have stabbed the Islamic State in the back.” In these messages, the Islamic State relies on allusions to actual incidents, such as the group's 2014 attempt to advance to Syria's Sahel area in the west under the pretext of fighting the regime, when groups affiliated with al-Qaeda reported it to Assad's forces.<sup>66</sup>

Throughout 2014, the Islamic State also tried to eliminate the leadership of al-Nusra, mainly using assassinations, car bombs, and kidnappings.<sup>67</sup> More broadly, the group regards all areas outside the boundaries of the caliphate as the lands of infidels (*bilad al-kufri*) and all other groups as infidels, which justifies its attacks against them.

But personal grievances also play a role. For instance, Nusra leader Abu Mohammad al-Golani is regarded as an apostate (*naker al-bayah*) because he was initially sent by Baghdadi to Syria to help establish the caliphate there, only for him to create Jabhat al-Nusra instead. Personal disagreements are also behind the *takfir* (excommunication) of the Jaysh al-Islam leader Zahran Alloush.<sup>68</sup>

The Islamic State's presentation of itself as the true al-Qaeda is partly driven by financial ambitions, as this label creates doubt among al-Qaeda donors, many of whom have shifted their funding to the Islamic State in their pursuit of supporting the spread of true Wahhabi ideology.<sup>69</sup> The group plays on this sentiment by using the narrative of the resurrection of the golden days of Islam. In *Dabiq*, the online magazine that the Islamic State has been publishing since June 2014, the group refers to its Western opponents as “crusaders.” The magazine also often makes parallels between present incidents and stories from the dawn of Islam as a way to cultivate a sense of legitimacy for the organization.

## Military Strategy

Since the emergence of the Islamic State, the group's military strategy has relied on evolving theater-level operations and tactics. In the period of its ascent, which culminated with the June 2014 advance in Iraq, the Islamic State relied on offensive warfare to expand the territories under its control. Following that, the group took a mostly defensive stance. With the intensification of coalition air strikes in 2015 and the increased gains by rivals like Jabhat al-Nusra since February 2015, the Islamic State shifted its tactics, relying on opportunistic attacks on its opponents and again attempting to expand its geographic presence.

### *A Closed and Centralized Military Structure*

Throughout its military evolution, the Islamic State has relied on a number of constants. It merges theater-level operations and tactics used by nonstate militant groups with those used by conventional armies. The former stems from its roots in al-Qaeda in Iraq, and its adaptation of tactics used by Hezbollah, while the latter is the result of the involvement of former officers from what had been Iraq's ruling Baath Party, who joined al-Qaeda in Iraq, and later the Islamic State, in hopes of retaliating against the Iraqi government following the process of de-Baathification after the U.S.-led invasion in 2003.<sup>70</sup>

The Baathist–Islamic State connection sometimes overrides sectarian fault lines, as some former Baathist military commanders were, according to a local fighter, originally Shia but converted to Sunnism upon joining the militant group. These include Abu Ayman al-Iraqi, who became a top commander in the Islamic State.<sup>71</sup>

Although much attention has been given to Raqqa and Mosul as key urban centers for the Islamic State, both cities are in fact symbolic centers, while the organization's centers of mobilization lie elsewhere, including in the mosques in the east of Aleppo. And the Islamic State's command center lies in the deserts between Syria and Iraq, from which its leadership directs operations across the entirety of Islamic State territories and the world.

The combination of the military vision and strategy provided by former Baathist commanders and the experience of high-profile, veteran Sunni jihadists who fought in Afghanistan and Iraq has given the Islamic State an edge over its opponents. The group is similar to Hezbollah in that its organizational structure is institutionalized, not personalized. The combination of a hierarchical command system and an institutionalized structure means that the organization would not be weakened were it to be decapitated.

In recruiting new fighters, the Islamic State does not necessarily seek those with military experience. It has a strict vetting system aimed at sustaining hard-core loyalists and accepts fighters who have belonged to rival groups as long as they approach it willingly, outside the context of battle, and repent for

their earlier service; rival fighters who say that they repent during a battle are killed. Any new recruit has a choice: he can fight with the Islamic State as an individual without becoming an official member, or he can pledge allegiance to the group. Pledging allegiance carries higher benefits (money, status), but it is a lifetime commitment, meaning that such fighters who leave the Islamic State are considered apostates and killed. All Islamic State fighters must undergo a religious course of two to three months as well as military training, where the survival rate, according to a local militant, is only 50 percent, mainly because the course uses live ammunition. Following the completion of training, fighter loyalty is tested with requests that new recruits go to the front lines.<sup>72</sup>

This closed military structure means that, for the most part, the group does not form alliances with other organizations, even if they share the same ideology; other brigades are accepted only if they fight under the Islamic State umbrella.

However, there are at least two exceptions to this approach that show that pragmatism in the battlefield can sometimes prevail if the Islamic State feels militarily overwhelmed. In the first, personal connections between the group's leaders and some Jabhat al-Nusra commanders led the two groups in August 2014 to fight together in the same trenches in Qalamoun against Hezbollah and the National Defense Forces, which was created by the Syrian regime. In the second, the Islamic State reached out to the Free Syrian Army to collaborate on the siege of the military airport in Deir Ezzor in early 2015, but the FSA refused.<sup>73</sup>

#### *All-Out Attacks as a Tactic*

The Islamic State appears to have no qualms about sacrificing hundreds of fighters in high-profile military offensives. In the Tabqa battle, the group lost between 300 and 400 fighters in a few days under regime air strikes, but continued its onslaught on the airport, well aware that control of this important military base could help show potential recruits that the Islamic State was succeeding.

The Islamic State continues to engage in spectacular all-out attacks that rely on multiple suicide bombers, as the Tabqa attack did, which helps to explain its heavy recruitment of children. The group trains children outside school hours, exposing them to graphic violence, and produces training videos to encourage young teenagers to fight. The focus on training children, according to an Islamic State member, is because fifteen- and sixteen-year-olds cannot evaluate risk and are more prepared to engage in suicide operations.<sup>74</sup>

These spectacular all-out attacks serve to intimidate enemies and attract new members by showing that the Islamic State is the strongest jihadist actor on the ground in Syria and Iraq. Fear and admiration have driven numerous rebel brigades to pledge allegiance to the Islamic State, including some brigades from Ansar al-Sham and Ahrar al-Sham as well as an emir of Jabhat al-Nusra in Deir

Ezzor and even some FSA brigades in eastern Deir Ezzor. In southern Syria, the Islamic State has been attempting to establish a foothold through local recruitment of Syrians and Palestinians and through ties with some Jabhat al-Nusra brigades that have personal connections with Islamic State leaders.<sup>75</sup>

But pledges of allegiance by other brigades are not all out of conviction. A key reason behind the decision by brigades in Deir Ezzor to formally back the Islamic State was that they had not been able to forge direct links to military supplies from the FSA, leaving them faced with the choice of either joining the Islamic State or being exterminated by it.<sup>76</sup>

### *Defensive Warfare*

Following the Islamic State's expansion in June 2014, the group sought to fuel its narrative of fighting infidels by drawing Western air strikes against its territories.<sup>77</sup> Through this shift to defensive warfare operations, the Islamic State consolidated on-the-ground tactics it had adapted from groups like the Taliban and Hezbollah. This kind of warfare, including the use of tunnels and underground operations, is generally more effective for smaller groups like the Islamic State that are battling larger organized armies, as has been the case with Hezbollah and Hamas in their confrontations with Israel. The Islamic State hinted at its desire to engage in defensive warfare in the first issue of *Dabiq* in June 2014, in which it made parallels between the present and the historical battle of Dabiq, in which Muslims defended their lands against crusades.

According to one local fighter, the Islamic State's beheading of two American hostages the same month was a deliberate provocation of the West meant to spark a defensive war.<sup>78</sup> After the group became financially independent in 2014, it was no longer reliant on ransoms for income. Hostages therefore were no longer used for fundraising but became a tool of war. The Islamic State calculated that the West would not want to commit boots on the ground in retaliation for the killing of hostages and would limit its engagement to air strikes, and the militant group prepared for this scenario by hiding weapons underground, emptying military bases, and scattering its members among the local populations in Iraq and Syria.<sup>79</sup>

The air strikes by the U.S.-led international coalition that began in September 2014 came to validate the Islamic State's narrative that it is engaged in a jihad against infidels and crusaders who are killing Muslims, particularly as the strikes have killed a significant number of civilians. The strikes were used as the group tried to boost recruitment by escalating its calls for *hijra* (migration to the caliphate) and *bayah* (pledging allegiance to the Islamic State). The calls were supported by what some antiregime tribes in Syria saw as the hypocrisy of the West for its failure to intervene against Assad, which further contributed to a hike in membership.<sup>80</sup>

*Opportunistic Gains*

Changes on the battlefield in the first half of 2015 once again prompted the Islamic State to adjust its operations and tactics, retreating from some Iraqi areas following the international coalition air strikes and counterattacks by the peshmerga and regrouping in Syria.

The group's emergence as the strongest jihadist actor in the region has been paralleled by increased losses by the Syrian regime. Assad's forces consequently appear to be shifting the focus of their military operations from maintaining localized control of urban centers across Syria's governorates (the exception until April 2015 was Raqqa) to defending core areas in regime strongholds of the Sahel area and Damascus. This shift has translated into the regime's abandonment of areas like Idlib and Palmyra, the latter of which fell to the Islamic State in May 2015.

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This retreat has paved the way for the Islamic State to expand the scope of areas under its control in Syria, which remains the optimal center of the caliphate due to the concentration of coalition attacks in Iraq and the likelihood that the Syrian conflict will continue long into the future.

The passage of time would allow the group to set deep roots in Syria, which in turn would enable it to retain its control unless it is challenged on the ground, as was the case in Kobane and in Tal Abyad, on the Syrian-Turkish border, which the Islamic State lost to Kurdish fighters in June 2015.

Following the Mosul advance, the Islamic State quickly diverted newly seized military equipment and monetary gains to Syria, and since then has been attempting to take over Deir Ezzor; in mid-2015 it controlled most of the province with the exception of the military airport and the center of the city, which are under regime control. It has also been attempting to take over more territory in Aleppo.

In mid-2015, the group seemed most likely to face on-the-ground confrontations with Jaysh al-Fateh in the north of the country, and more substantially, with the Free Syrian Army's Southern Front brigades in the south. This is because the regime remains more interested in attacking the Free Syrian Army than attacking the Islamic State, while the Western-led coalition has largely limited its activities to air strikes, most of which are aimed at areas the Islamic State controls in Iraq.<sup>81</sup>

## Challenges Facing the Islamic State

The Islamic State faces a number of challenges, and the leadership of the organization is constantly devising ways of addressing them.

## Local Grievances

Although the Islamic State seeks to apply sharia as a basis for governance, the mechanisms it uses to do so are still in the making and are therefore not consistent or predictable. This has resulted in popular dissatisfaction with its governance practices. Different emirs interpret and apply rules differently, causing resentment among some populations in areas the group controls. The Islamic State is also becoming more brutal in its dealings with its constituents, leading people to complain about it privately.<sup>82</sup> In a way, the group has trapped itself; it has turned to violence so often that it cannot de-escalate without losing credibility.

The group is also facing increasing internal dissent among its fighters, with some attempting to flee because they disagree with its behavior. And it is proving difficult to unite fighters with diverse backgrounds under one ideology, especially when the parameters of this ideology remain unclear. The Islamic State's leadership has responded by executing members who dare to voice criticism of the organization's actions, including the killing of over 100 fighters in December 2014.<sup>83</sup>

The threat of violence was also used to silence Abu Luqman, the emir of Raqqa, after he challenged Abu Bakr al-Baghdadi in June 2014, saying he should have also had the opportunity to become *emir al-momineen*. Abu Luqman was executed in January 2015 by an Islamic State fighter from Libya. There have also been cases in which the group faced dissent from members who regarded the organization as not extreme enough; one Kuwaiti emir who made such complaints was promptly executed as a result in 2015, after being accused of being a spy.<sup>84</sup>

## Syrian-Foreign Tensions

Tensions are also rising between Syrian and foreign fighters.

In Mayadeen, in the east, a Syrian emir clashed with an Egyptian emir, killing the latter and then putting a cigarette in his mouth to make the murder look like a legitimate punishment.<sup>85</sup>

A key motivation for Russian-speaking fighters to join the Islamic State is their hope that they will be able to use the fight in Syria as a step toward attacking the Russian regime, and they are often seen by fighters from other backgrounds as pursuing their own distinct agenda.

In Raqqa, a series of clashes has erupted between the emir and Chechen fighters. Chechen and Dagestani fighters are proving to be more brutal and rigid than other fighters, according to a local militant. For example, the Jordanian pilot was burned alive in 2015 after severe disagreements between Russian-speaking fighters and the Iraqi and Syrian Islamic State leadership

in Raqqa and Tabqa, with the former insisting on the burning and the latter questioning it because the pilot was Muslim, and Islam generally prohibits immolation. Even though the Russian-speaking fighters were lower ranking than the Iraqi and Syrian leaders, they still managed to overrule their leaders through intimidation. This has caused the leadership in Raqqa to exercise caution even among other members of the Islamic State; according to one local fighter, high-ranking emirs no longer feel safe enough to go out at night without heavy security.<sup>86</sup>

What Syrian fighters say is discrimination against them is also lowering morale. Syrian fighters say they are given fewer privileges than foreign fighters and are also sent to the front lines more often. Conditions on the front lines, especially in Deir Ezzor and Hasakah, in the northeast, have deteriorated because the Islamic State is fighting several enemies at once: the Free Syrian Army; the Raqqa Revolutionaries' Brigade; the secular Kurdish People's Protection Units (YPG); and the Kurdistan Workers' Party (PKK), with the latter fighting alongside the regime.

Islamic State fighters have come to see being sent to the front lines as being sent to a guaranteed death. While many regard being a member of the group as fulfilling a "death ideology," others are questioning the selection of who is sent to the front lines. The Islamic State leadership has responded by sending members it wants to get rid of to the front lines; that was the case during the battle of Kobane in late 2014, when, as the group realized it was losing, it began sending those it considered troublesome as a way to get rid of them.<sup>87</sup>

The local Syrian population is also growing unhappy with foreign members of the Islamic State, who are seen as lacking in understanding of local cultural nuances. Their harsh yet inconsistent method of implementing sharia is putting locals off, especially among those with religious training. As foreigners are given more privileges, Syrians say they sometimes act in ways that overstep even the boundaries set by the Islamic State leadership. For example, in Raqqa, there have been cases of foreign emirs entering mosques and giving sermons without having religious credentials. Higher-ranking emirs are aware of these problems, and have tried to address them by arranging for foreign fighters to marry Syrian women to deepen their links with the local population and by replacing foreign emirs with local Syrian sheikhs. But this led to another problem, as the sheikhs used their positions to take over people's houses and enslave women. Some Syrian residents in Raqqa consequently regard foreigners as treating them better than Syrian leaders do.<sup>88</sup>

### **Governance and Security Challenges**

The Islamic State furthermore faces the challenge of being able to establish an actual state. The group has been stretching itself too thin, and, by mid-2015, was unable to expand geographically without being weak in many areas. Although it has begun establishing its own government institutions, the group

lacks the expertise and resources to run a full-fledged state and its governance capabilities are at an elemental stage. Media reports indicate that the level of service provision in areas controlled by the Islamic State is below the minimum need.<sup>89</sup> These hurdles as well as Turkey's closing of its border with Syria in 2015 are slowing down the process of *hijra* by foreigners, leading to a shortage of needed technocrats as well as a decrease in potential new fighters.<sup>90</sup>

The group also faces a grave security challenge. Although the international coalition's campaign is focused on air strikes, it is reliant on local intelligence to target Islamic State leaders. This has made the group's leadership highly suspicious of visitors and newcomers, especially foreigners, fearing that they might be spies. But here the Islamic State is facing a conundrum: it cannot turn away people who have approached it pledging allegiance, but in order to determine whether these newcomers are trustworthy, it must employ a significant number of people to monitor them. This is proving to be a financial and logistical burden, especially at a time when the Islamic State is in need of more people to move to its areas to support the creation of the caliphate. Leaders of the group, unable to quell their security concerns, have been keeping the locations of their homes secret and are said to be ordering the killing of anyone suspected of infiltration.<sup>91</sup>

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## The Islamic State faces the challenge of being able to establish an actual state.

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### Geographic Expansion

Although the Islamic State has been able to increase its geographical presence in Syria and Iraq, it has not been able to do so indefinitely. It is finding it difficult to expand into and hold areas where there is significant local resistance, like Shia areas in Iraq or Kurdish areas in Syria.

The group has been attempting to take over parts of the Aleppo Governorate, but it has faced a series of hurdles there as well. Initially, the Islamic State faced resistance in the area from Western-supported Syrian rebel groups, namely the Hazm Movement and the Syria Revolutionaries' Front. Following the decline of these groups after attacks on them by Jabhat al-Nusra in late 2014 and the rise of Jaysh al-Fateh in the north, the Islamic State has been facing resistance from this new rival rebel coalition, as well as continued resistance in northern Aleppo from mainly Islamist groups under the umbrella coalition called al-Jabha al-Shamiya. The regime air strikes and barrel bombing are also making it difficult for the group to expand in Aleppo, because increasing the territory it controls would require a heightened military presence, which risks exposing the Islamic State to further strikes.

When the Islamic State has appeared to be overstretched geographically, it has often moved to regroup and strengthen its hold on areas it already controls, as it did during the March 2014 attempt to take over Idlib. At that time, after the area was judged to be too far and detached from its operations in Raqqa, the group decided to withdraw and consolidate its hold on Raqqa.<sup>92</sup>

But the takeover of Idlib by Jaysh al-Fateh coupled with the regime's retreat from areas like Palmyra spurred the Islamic State to resume its expansion in Syria in order to showcase its influence, especially in the face of the rival Jaysh al-Fateh. This has put it at risk of stretching itself too thin, especially because its model of holding areas is through blanket control, which requires significant human, security, and governance resources.

#### *International Expansion*

The challenges of the domestic situation in Syria and Iraq have been a key reason why the Islamic State has also been increasingly engaging in attacks in other countries such as Yemen, Libya, and Egypt. It has accepted pledges of allegiance from groups residing in those areas and has sent its own emirs to broker deals with them. Some of those groups are relative newcomers, such as Ansar Bayt al-Maqdis in Sinai, and see in the Islamic State a way to get power and resources. Others, like Ansar al-Sharia in Libya, have older ties that go back to the first year of the Syrian revolution, when Libyan rebels collaborated with Syrian rebels to set up the Muhajiroun Brigade, which began in the Sahel area in Syria, then moved to Raqqa. Since then, there have been a number of Libyan leaders within the Islamic State who have taken its model back to Libya.<sup>93</sup>

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**The challenges of the domestic situation in Syria and Iraq have been a key reason why the Islamic State has also been increasingly engaging in attacks in other countries.**

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This expansion of activities appears to be motivated not by a desire to increase the geographical boundaries of the caliphate, but rather by both psychological and tactical concerns. To boost the morale of its followers, the Islamic State is trying to show them that it has global impact. At the same time, by distracting the international community away from Syria, the group may gain time to manage the challenges it faces within the country. According to a local

fighter, the Islamic State recognizes that the Syrian regime needs it to exist, and that the United States benefits from its existence while it is undecided about the fate of the Assad regime, so the group is biding its time to regroup in Syria. Meanwhile, it is relying on sleeper cells and asymmetrical attacks to showcase its influence around the world.<sup>94</sup>

But this expansion poses its own challenge. As more groups and individuals pledge allegiance to the Islamic State in a bid to gain power, notoriety, and resources, and as the Islamic State embraces more and more such entities and incidents to assert its global influence, it will be forced to change from a centralized organization into a franchise similar to al-Qaeda. As one local source described it, the rise of smaller models of the Islamic State across the Middle East and North Africa will transform the group into “the Medusa, an organization with semi-independent branches operating all over the world.” And, the less centralized the Islamic State is, the less able it will be to control its global operations.

## A Strategy to Counter the Islamic State

Despite the challenges facing it, the Islamic State has been resilient and adaptable.

Even though it lost a quarter of its territories in Iraq after the first six months of international coalition air strikes, it still managed to advance into the city of Ramadi in May 2015. The coalition's focus on Iraq has allowed the Islamic State to double the area under its control in Syria, despite a number of tactical withdrawals and losses in Kurdish areas. The group has enlarged the scope of its operations southward, where it has been targeting the Free Syrian Army's Southern Front, and westward in Aleppo. But the success of the Islamic State must not be judged by the size of territories under its control. Rather, it should be measured by the resilience of the group as a whole.

Part of this resilience is due to the group's constant search for solutions to the challenges it is facing and to its ability to adapt its theater-level operations and tactics accordingly. But the Islamic State's successes are also a product of the opportunities it is taking advantage of. Those opportunities are the result of weaknesses in the international coalition's strategy, including inadequate attention to addressing sectarian grievances in Iraq and the continuation of the Assad regime in Syria in the absence of a solution to the conflict.

For the international community and regional actors, the Islamic State represents a serious threat to regional and even global security. The coalition established and led by the United States is a positive step toward tackling this threat; however, it is far from adequate. While the Islamic State's strategy is diverse and includes social and economic components as well as military ones, the coalition's campaign remains focused on military activity; that military activity is largely limited to air strikes mainly targeting the Islamic State's urban centers, as opposed to its desert-based command centers. As a result, the group has retained the ability to direct its global operations.

The air strikes themselves have been a double-edged sword. In Syria, they have resulted in the deaths of FSA fighters who had been held by the Islamic State. At the outset of the strikes in 2014, 200 such fighters were killed in a coalition strike on an Islamic State court where they had been detained in Abu Kamal, in the east, while 300 FSA fighters faced a similar fate in Raqqa.<sup>95</sup> The air strikes on Raqqa have also killed mostly civilians, thereby increasing the population's anger at the West. Some Syrian tribes in the eastern part of the country have grown closer to the Islamic State as a result, as they complain that the international community did not intervene against the Assad regime but only against an organization that is presenting itself as fighting the regime.

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A similar sentiment is expressed in Iraq, where local resentment against the coalition's indirect cooperation with Shia militias in the fight against the Islamic State is increasing, especially given the level of looting that those militias have been engaged in in areas like Tikrit.<sup>96</sup> The high degree of sectarianism in Iraq and the fact that the Islamic State emerged from the area in 2003 mean that the group has deep ties in the country that will be difficult to undo without comprehensive measures to win the trust of the local Sunni population.

Even coalition successes have come at a great material cost. In Kobane, peshmerga ground forces provided intelligence about Islamic State locations in the town, which coalition fighter jets used to set their bombing targets. The result was the flattening of Kobane. Applying the same approach to other areas like Mosul would be catastrophic.

While the air strikes may have weakened the Islamic State, they will not be able to eradicate it. The group has a long-term goal and it is counting on Syria's descent into a failed state in order to raise a new generation of loyalists. This should prompt reflection on the impossibility of eliminating the Islamic State without achieving a political solution to the Syrian conflict.

The Syrian regime has presented itself as a counterterrorism partner to the West, and some countries have explored the idea of working with the Assad regime to fight the Islamic State. But this is not a realistic approach. It is important to remember that the group is partly a product of the Assad regime itself; even if the regime were to be engaged in the fight against the Islamic State, it would remain in Assad's interest to retain jihadist activity in Syria to support his assertion that he is countering extremism.

It is equally unrealistic to expect to eradicate the Islamic State first and then deal with political transition in Syria. The two should run simultaneously, which means that there must be an internationally supported political strategy for Syria that would prevent the country from descending into the kind of chaos witnessed in Libya after the fall of Muammar Qaddafi.

In the short term, the challenges faced by the Islamic State can be used as opportunities for the international coalition to identify and exploit points of weakness. Although the group's leadership is attempting to find solutions to those problems, from overstretched resources to governance challenges to local grievances, many of them can be utilized to increase pressure on the organization from within.

Attempts to use propaganda against the Islamic State must therefore not focus on ideology—and, for example, arguments that the group is not truly Islamist—but on the contradictory dynamics of everyday life and of battlefields under its umbrella, such as its inconsistent governance practices. The nations arrayed against the Islamic State should also increase the monitoring of individuals and groups outside Syria and Iraq who might act as sleeper cells.

Turkey can also play a seminal role in the short term. Before 2011, the Syrian-Iraqi border was difficult to penetrate. The conflict in Syria made this border porous, which allowed what was then al-Qaeda in Iraq, the Islamic State's parent organization, to gain access to fighters who were crossing into Iraq after having entered Syria through Turkey. Turkey has stepped up its cooperation with the anti-Islamic State coalition, including through closing its border with Syria, but it has stopped short of allowing coalition aircraft to operate from Turkish bases. Access to such bases would help the coalition campaign better reach targets in Syria.

The air strikes campaign should be complemented with the creation of a national guard in Iraq that includes representatives of the country's Sunni as well as Shia communities, in order to prevent the Islamic State from playing on Sunni grievances, and with the strengthening of the only remaining moderate opposition coalition fighting the Islamic State in Syria, the Southern Front.

The "train and equip" program set up by the United States and the UK in early 2015 to increase the number of vetted moderate fighters is not sufficient. The Southern Front also needs help at the coordination and financial levels to be able to attract other independent brigades to join it. In addition, the more the moderate opposition is shown to be able to deliver, the higher the level of local trust in it, which would translate into increased impact and operational efficiency. This is not only because local support increases the Southern Front's information-gathering capacity, but also because it facilitates the Southern Front's work with local civilian councils. This is crucial because the Southern Front operates in Daraa, a strategic location only 100 kilometers (about 62 miles) from Damascus. If the Islamic State manages to overwhelm the Southern Front, it will be easier for the group to advance toward Damascus.

In the medium term, the only way to effectively fight the Islamic State is to put in place local governance and decisionmaking measures in Iraq that would restore citizen confidence in state institutions and alleviate intra- and intersectarian divisions.

In Syria, international stakeholders in the conflict must first reach a compromise agreement on transition in the country. This should take the shape of an interim government with representation from different opposition groups on the ground, both military and civilian, as well as the opposition abroad. Having this agreement in place would encourage figures from the current regime who are open to compromise—but who are afraid to leave the regime for the lack of a safety net—to join the interim government. This kind of government would eventually enable the Syrian army to be unified and the new

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**The high degree of sectarianism in Iraq and the fact that the Islamic State emerged from the area in 2003 mean that the group has deep ties in the country that will be difficult to undo.**

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Syrian government to formally seek the support of the international community to fight the Islamic State. It would also encourage citizens who are unhappily living in areas controlled by the Islamic State to mobilize against it. Those tribes that affiliate themselves with the group out of fear would also be likely to change their affiliations when they see a stronger alternative.

In the long term, plans for an equitable distribution of resources and for giving citizens a say in local governance would restore trust in government and attract those who are affiliating themselves with the Islamic State in pursuit of

material gain. One way to achieve this would be through initiating a discussion about federalism in Syria and Iraq and getting Syrians to decide on the shape and implementation of such a governance structure.

In Syria, the seeds of credible local governance have already been planted in the south, where the Southern Front has entered a process of institutionalization to widen the scope of its mandate from military activities to governance.<sup>97</sup> The Southern Front needs international support to enable it not just to stand up to the Islamic State and the regime but also to be able to play a role in Syria's political

transition. Assistance is needed to provide salaries to fighters and civilians working with Southern Front institutions, to allow them to compete with what groups like the Islamic State offer. This support would also allow the Southern Front to strengthen its governance initiatives, such as efforts to work with the local councils to set up civil courts, which would allow these institutions to provide an alternative to the governance system offered by the Islamic State.

Ultimately, the way to eradicate the Islamic State is not by conducting military strikes alone, but by cutting its two main lifelines: grievances in Iraq and the Syrian conflict. This requires addressing sectarianism in Iraq and implementing a wider comprehensive road map to end the Syrian conflict.

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**In the medium term, the only way to effectively fight the Islamic State is to put in place local governance and decisionmaking measures in Iraq that would restore citizen confidence in state institutions and alleviate intra- and intersectarian divisions.**

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## Notes

- 1 This paper is mainly based on interviews conducted by the author between March 2014 and May 2015 with a number of mostly Syrian civilians and militants who are based in areas under the Islamic State's control and in areas it does not control in Syria, and in southern Turkey and Jordan. Some of the interviews were conducted face-to-face in southern Turkey and Jordan, and others by Skype. The interviewees ranged from Islamic State sympathizers to opponents of the group and came from a variety of backgrounds. Their identities remain anonymous at their request.
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