

## Is ISIS a Revolutionary Group and if Yes, What Are the Implications?

by Stathis N. Kalyvas

### *Abstract*

*Can we understand The Islamic State as a revolutionary group? And should we? If the answer is positive, what are the implications that follow? I discuss a number of dimensions, including combat, organization, and governance to assess the extent to which the experience of revolutionary groups during the Cold War, mostly of various Marxist persuasions, may help enhance our understanding of the current practices and future prospects of the Islamic State. I argue that thinking of the Islamic State as a revolutionary group opens up new perspectives that take advantage of the recent historical record, while shielding us from overly exceptionalist interpretations.*

**Keywords:** Jihadism, ISIS, civil war, insurgency, Marxist groups, revolutionary insurgencies

### **1. Introduction**

The emergence of the Islamic State (or Islamic State of Iraq and Syria-ISIS) as a major rebel organization in Syria, its subsequent expansion at the expense of competing Syrian insurgent groups, and its rapid conquest of vast swaths of territory in Iraq in the summer of 2014 (including the cities of Mosul and most recently of Ramadi) took most observers by surprise. Its subsequent resilience in the face of a sustained US-led bombing campaign in conjunction with the regular deployment of spectacular acts of violence—as well as its ability to attract thousands of volunteers from across Europe, the Middle East, North Africa, and Central Asia—gave rise to a profusion of arguments about the nature and character of what was only recently an unknown entity. Not surprisingly, a large proportion of these arguments converge in stressing the religious dimension of ISIS. [1]

While such a focus is certainly warranted, it is alternatively possible to also see ISIS as a “revolutionary” armed group. In turn, such a framing would imply a different way of understanding ISIS and similar jihadi groups.[2] Doing so has the advantage of eschewing the temptation of exceptionalism and bringing to the fore the rich experience of revolutionary insurgencies during the Cold War—and more generally the wealth of insights generated by the comparative study of civil wars.

### **2. How the comparative study of civil wars deals with different rebel types**

The comparative study of civil wars constitutes an extensive body of research, primarily located in political science, that has gradually moved away from an initial search of a set of master structural variables underlying civil wars (poverty, ethnic diversity, etc.) to focus instead on the characteristics of rebel groups and how they may affect strategic choices and performance. Still, the study of exactly how political identity, including associated ideological differences, help explain variation in group behavior and outcomes remains under-explored.[3]

Until recently, the main dimension of rebel type that had attracted scholarly attention was based on ethnicity. The distinction, first of ethnic and non-ethnic wars, and later of ethnic and non-ethnic rebel groups has generated considerable research output, mainly stressing two variables: political inclusion or exclusion and horizontal (that is, group-level) economic inequality. A different and intriguing (yet less popular) distinction has focused on the economic endowments of rebel groups, thus separating poor from wealthy

rebels and drawing several empirical implications, mostly related to the use of violence.[4] Recent studies have emphasized a number of different organizational dimensions, primarily on the rebel side, but also on the state side, including comparisons between “ideological” and “non-ideological” groups and between Islamist and nationalist groups.[5] On the theoretical and conceptual front, a compelling case has been made for the necessity of taking the ideology of rebel groups into account.[6] Perhaps the most important recent contribution in that respect is the social-institutional theory proposed by Paul Staniland, which predicts that the level of cohesion and performance of rebel groups is a function of the prewar networks where insurgent leaders were embedded. Staniland posits four basic types of rebel groups (integrated, vanguard, parochial, and fragmented) reflecting different combinations of reliance on prewar networks which, he argues, hold more predictive power on the level of group cohesion and survival than variables such as ideology, ethnicity, state enemy or resource flows.[7]

Overall, this is a new and promising literature, still at an early stage and subject to considerable confusion as the various dimensions of interest proliferate. At the same time, empirical research is primarily located at the subnational level, comparing groups at the local level. Research is now moving to a new level where subnational research projects are producing a set of robust findings that can begin to be compared to each other. In turn, such comparisons will allow us to formulate scope conditions about different subsets of civil wars and their etiology which will eventually substitute present “lowest common denominator” approaches that have been rather unsuccessfully searching for a master set of universal predictors of civil wars.

### **3. *Revolutionary Rebels***

Where does the “revolutionary” dimension fit it—and what exactly does it mean and capture? In its simplest formulation proposed herein, a revolutionary group can be defined as a group that aims not just to gain power but self-consciously to transform society in a deep and radical way, by profoundly rearranging social and political relations. It is probably hard to measure the revolutionary character of a group in a precise way, but the distinction makes sense in a more general way: it is much less hard to distinguish revolutionary groups from groups that just aim to acquire power for its own sake—even when the latter may enact policies that inadvertently may impact on everyday life (hence the self-conscious transformative element). Fidel Castro and Charles Taylor represent two ideal-type leaders in that respect.

The characterization of a group as revolutionary captures a set of other features. A revolutionary group is by definition ideological, although not all ideological groups are revolutionary. Nationalist/secessionist groups can be revolutionary if the nation-state is not the norm (for example in an imperial setting). Revolutionary groups could be either vanguard or integrated, following Staniland’s formulation, but not parochial, and they can be either poor or wealthy (if they exploit natural resources, such as the FARC in Colombia, or receive extensive foreign assistance, as the MPLA in Angola). In short, this is a characterization that is general enough to subsume several dimensions analyzed in the literature, yet specific enough to be analytically useful.

Given this approach, would it be meaningful at all to describe ISIS as a revolutionary group? If we conceive of revolution as the attempt to put a utopian social program into action, such that its resulting application would upend existing social and political relations in a significant way, then clearly ISIS is a revolutionary group (see, for example, Aymenn al-Tamimi’s article in this special issue). No one would dispute that ISIS pushes forward an agenda of far-reaching social and political transformation. In fact, one of the foremost (if often, implicit) critiques of the use of revolutionary identity in political analysis—namely, that it is mere

window dressing to facilitate access to foreign assistance—obviously does not apply to ISIS, a group that seems to display an excess of revolutionary zeal.

What do we know about the impact of the revolutionary character of certain rebel actors on their behavior and performance? In ongoing research with Laia Balcells, we have investigated the correlates of revolutionary Marxist insurgencies, which flourished during the Cold War.[8] We found that these rebel groups were associated with longer and deadlier conflicts that typically took the form of irregular or guerrilla war. We also found, contrary to our expectations, that they were more likely to end up on the losing side of the conflict than almost any other group, nationalist or simply power-oriented. We explained this puzzling outcome (“the Marxist paradox”) by stressing the fact that these groups fought against states that were both stronger and also tended to be strengthened by the revolutionary challenge they faced. In a context characterized by systemic and international rivalries, robust foreign assistance and socially redistributive programs helped shore up the capacity of the state to face these Marxist rebels. In an ironic and indirect way, then, Marxist-inspired rebellions ended up shoring up state capacity. Lastly, we located an interesting exception to the tendency of Marxist rebels to be defeated: Marxist-inspired national liberation movements (i.e. nationalist or secessionist groups) proved much more successful, suggesting that the combination of a social revolutionary agenda and a nationalist identity could be quite powerful.

#### ***4. Key dimensions of revolutionary rebels***

In what follows, I take this analysis a step further by identifying several dimensions at the “meso” level, where a revolutionary identity could provide some analytical leverage—and then see what we can learn in the case of ISIS. More specifically, I focus on three key (and related) dimensions: combat, organization, and governance.

One of the most interesting features of the Marxist rebel groups that fought in major civil wars (which differentiates the large and consequential groups from the hundreds of stillborn ones) is that they almost chose to fight irregular or guerrilla wars. Indeed, modern guerrilla war was invented primarily by Marxist revolutionaries and practiced largely by them, although it spilled over to other groups as well. Why? The answer is that these groups had some organizational characteristics that allowed them to implement this very demanding form of war.

Irregular war is asymmetric by definition, as it pits a militarily weaker actor against a stronger one. In purely military terms, asymmetry makes no sense: it is resolved in the battlefield in favor of the stronger actor. This is why, in a conventional war, the balance of power and final outcome is largely a function of resources plus strategy. Therefore, the very fact that a weaker actor can fight in a sustained way (and, often, for a very long time) against a stronger one is a reflection of factors that compensate for the resource deficit of the weaker actor. These factors are largely organizational.

In the large body of literature covering the organization and practice of insurgency and counterinsurgency,[9] the emphasis is on ideology rather than organization: the ability of the rebels to win over the local population through ideology (their “hearts and minds”) is considered of essence for the ability of the rebels to operate (“like fish in the water”). However, in practice, even if ideology is necessary in producing popular support and mobilization, it is never sufficient. When one reads how rebel groups manage to obtain the consent, if not always the support, of the population, one finds three types of stories, which are far from mutually exclusive:

- The first story is about the ability of a group to establish (and provide the public good of) order in areas where anarchy disrupted livelihoods.

- The second story is about the ability of a group to police a territory effectively and identify and punish “defectors” (i.e. individuals assisting or working for their rivals) and reward supporters.[10]
- The third story is about the ability of the group to effectively govern a territory and supply the local population with public goods and governance, thus establishing itself as the de facto rulers.

In all these stories, popular consent and collaboration (what is often described as “support”) is the outcome of the organizational ability to perform these tasks. Compared to other type of groups, an argument can be made that revolutionary groups have a better ability to perform these tasks. I focus on this question below.

### ***5. ISIS as a revolutionary group***

The following appears to be largely the story of ISIS: it uses its clandestine organization to infiltrate territories held by its opponents, begins a campaign of selective violence there, and only attacks when the enemy has weakened.[11] This is a hybrid strategy of guerrilla war in a first stage and conventional war in a second one. The main difference between ISIS military tactics and that of the older Marxist groups is the extent to which conventional military fighting is enacted from very early on, both in Syria and Iraq. Of course, the Maoist doctrine of irregular war posited conventional war as the final stage of the war. However, conventional war is the main type of combat that ISIS uses so far (and this differentiates it from other jihadi rebels, such as the Algerian GIA, for instance). This particularity is likely due to a combination of the flat terrain of Syria and Iraq and the military weakness of its opponents. In addition, the endogenous dynamics of conflict have played a key role through “positive resource shocks” in the form of sudden capture of massive quantities of heavy weaponry. For example, when ISIS took Mosul in June 2014, it captured 1,500 Humvees, 52 M198 Howitzers and much more. In other words, ISIS benefited from a rare constellation of very weak yet heavily endowed opponents.[12]

Unlike the conventional nature of fighting, the control of territory is an essential feature of all civil wars. That jihadi groups had in the past opted primarily for a type of fighting that was based on clandestine organization and spectacular attacks (a strategy known as “terrorism”) was a reflection of their extreme weakness. Once they could set up larger organizations in states whose repressive apparatus had been depleted due to external shocks (e.g., Iraq after 2003 and Syria after 2011), they could step up their game. In other words, the conquest and control of territory was endogenous to the strategic situation rather than a first-order choice that requires a complicated explanation.[13]

This in turn, raises the question of why revolutionary organizations have an advantage over non-revolutionary ones when it comes to organization (note here that this is a different question from why some revolutionary groups are more successful than other revolutionary groups). The answer is probably that these groups have the ability to recruit and retain motivated cadres (“middle managers” in business parlance, “junior officers” in military parlance). Indeed, Marxist revolutionary groups were very effective, under some conditions, in recruiting highly motivated individuals who perform the risk tasks required of them. Note that this is a very different implication from the standard one in the mass mobilization/collective action literature, which assumes that the key actors are motivated individuals at the mass level.

Clearly, ISIS has the capacity to deploy an organization staffed by motivated cadres, and this goes a long way toward explaining its success and its ability to prevail over its more fragmented rivals. Exactly how ISIS recruits, trains, motivates, and retains its cadres is one of the most pressing research questions. On this point, the research carried out on Marxist revolutionary groups can be highly suggestive and includes their emphasis on ideological indoctrination and constant transnational cross-fertilization.

But why would revolutionaries have an advantage in the recruitment of cadres? Initially, one has to look at the structural conditions that give rise to a small number of people willing to undertake radical action, including external shocks such as the collapse of order following a foreign invasion and occupation. The following step is the coordination of these people by an existing organization. In turn, the two key factors that may explain the presence and ability of this organization to successfully recruit cadres are already existing organizational legacies and the resonance of its ideological message.

The last part of the story has to do with the ability of the organization to replenish its ranks, which are naturally depleted in conditions of military struggle. Like other revolutionary groups in the past, ISIS has profited handsomely from the infusion of foreign fighters in its ranks, a feature of rebel groups that have had the capacity to rely on a diffuse transnational social movement. However, the strength of ISIS cannot be reduced to the contribution of foreign fighters, who remain primarily in the organization's lower ranks, but instead is derived in part from its ability to link up with the population, once it becomes its *de facto* ruler.

The emergence of a literature on rebel governance is one of the most interesting recent developments in the comparative study of civil wars, and provides evidence for the importance of rebel governance in the context of civil wars, while establishing why certain rebel organizations deviate from either the clandestine presence or the roving bandit type.[14] The impact of revolutionary groups on the type of rebel governance is double-edged. On the one hand, they are able to deploy their organization in a way that allows them to be consistent in governance, which is always appreciated. Additionally, they are keen to mobilize and indoctrinate the population, which is always a way to generate additional supporters and fighters. On the other hand, their governance is likely to be highly interventionist, to clash with established norms and practices, and thus likely to generate considerable opposition and resentment. One of the most interesting lessons one learns about successful revolutionary governance is the extent to which it was based on a realistic moderation of their most doctrinaire demands. The key implication for ISIS would be to see whether the way it rules will remain harsh and demanding, or follow a more moderate path (such as the Taliban's eventually became). If the former is the case, it is likely to generate an opposition that could be leveraged against it by its opponents, very much like the Americans did in Iraq in the mid-2000s.

The final point worth making is the experience of the so-called national liberation movements of the Cold War. If these movements were successful, it was because they were able to combine in the same organization radical, vanguard elements with local, parochial constituencies (they were "integrated" groups in Staniland's parlance). Although we know that this combination is a major achievement, we still do not know what factors make it more likely. There is an element of group-based nationalism in ISIS, via its representation of the disaffected Sunni populations of Syria and Iraq, but it is probably the case that it is more of a revolutionary group mobilization Sunni people than a Sunni peoples' organization with a revolutionary cover. Lastly, the exact function of religion for ISIS needs to be investigated more carefully. To be sure, religion acts as the sort of credibly utopian vision that motivates individuals to join the fight and put their lives on the line, very much like socialism or nationalism do for secular movements. But is there a dimension beyond ideology where religion (and, in particular, this form of religion) really matters—and if yes, exactly how?

## **6. Conclusion**

To summarize these brief reflections, I hope to have made a strong case that (a) it makes sense, if only for heuristic reasons, to think of ISIS as a revolutionary group; (b) such a characterization allows us to derive interesting implications from a comparison with the experience of past revolutionary groups, especially the Marxist groups of the Cold War; and (c) in turn, this comparison could act as a check against claims of ISIS

exceptionalism and uniqueness and generate new questions about its practices and behavior that are worth pursuing.

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### Notes

- [1] A typical assessment goes as follows: ISIS's "rise to power is less like the triumph of the Muslim Brotherhood in Egypt (a group whose leaders the Islamic State considers apostates) than like the realization of a dystopian alternate reality in which David Koresh or Jim Jones survived to wield absolute power over not just a few hundred people, but some 8 million." Graeme Wood, "What ISIS Really Wants," *The Atlantic*, March 2015, <http://www.theatlantic.com/features/archive/2015/02/what-isis-really-wants/384980/>. See also Aaron Y. Zelin, "The Massacre Strategy. Why ISIS brags about its Brutal Sectarian Murders," *Politico Magazine*, 17 June 2014, <http://www.politico.com/magazine/story/2014/06/the-massacre-strategy-107954.html#.VSBkAvnF98H>.
- [2] Stathis N. Kalyvas, "The Logic of Violence in the Islamic State's War," *The Washington Post*, 7 July 2014, <http://www.washingtonpost.com/blogs/monkey-cage/wp/2014/07/07/the-logic-of-violence-in-islamic-states-war/>.
- [3] Christopher Blattman and Edward Miguel, "Civil War," *Journal of Economic Literature* 48(1): 3–57, 2010.
- [4] Jeremy Weinstein, *Inside Rebellion. The Politics of Insurgent Violence*, New York: Cambridge University Press, 2007.
- [5] Some notable recent contributions include Juan E. Ugarriza and Matthew J. Craig, "The Relevance of Ideology to Contemporary Armed Conflicts: A Quantitative Analysis of Former Combatants in Colombia," *Journal of Conflict Resolution* 57 (3): 445–477, 2012 and Monica Duffy Toft and Yuri M. Zuckhov, "Islamists and Nationalists: Rebel Motivation and Counterinsurgency in the North Caucasus," *American Political Science Review* 109 (2), 222–238, 2015.
- [6] Francisco Gutiérrez Sanín and Elisabeth Jean Wood, "Ideology in Civil War: Instrumental Adoption and Beyond," *Journal of Peace Research* 51 (2): 213–226, 2014.
- [7] Paul Staniland, *Networks of Rebellion. Explaining Insurgent Cohesion and Collapse*. Ithaca: Cornell University Press, 2014.
- [8] Stathis N. Kalyvas and Laia Balcells, "Revolutionary Rebels and the "Marxist Paradox," Working Paper, 2015.
- [9] For a review, see Stathis N. Kalyvas, *The Logic of Violence in Civil War*, New York: Cambridge University Press, 2006 and David Kilcullen, *Counterinsurgency*, Oxford: Oxford University Press, 2010.
- [10] The selective use of violence by ISIS in this respect has been extremely successful in this respect, although it has received much less coverage compared to its act of spectacular violence against mostly Western hostages and massacres against Shia fighters. Kalyvas, 2014, *ibid*; Erika Solomon and Sam Jones, "Battling ISIS, A Long Campaign Ahead," *Financial Times*, 8 June 2015, <http://www.ft.com/intl/cms/s/0/33a0e52c-0ac9-11e5-a8e8-00144feabd00.html#axzz3ce6YnJeY>.
- [11] Solomon and Jones, *ibid*.
- [12] "Iraqi Army Remains on Defensive as Extent of June Debacle Becomes Clear," McClatchyDC, 14 July 2014, <http://www.mcclatchydc.com/news/nation-world/world/middle-east/article24770476.htm>.
- [13] Such as the following one: "The Islamic State, by contrast, requires territory to remain legitimate." Wood, *ibid*.
- [14] Zachariah Cherian Mampilly, *Rebel Rulers: Insurgent Governance and Civilian Life during War*, Ithaca: Cornell University Press, 2011; Ana Arjona, Nelson Kasfir and Zachariah Mampilly, *Rebel Governance in Civil War*, New York: Cambridge University Press, 2015.