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ISLAMIC STATE VS. AL-QAEDA

STRATEGIC DIMENSIONS OF A PATRICIDAL CONFLICT

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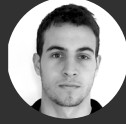
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KEY FINDINGS

The Islamic State (IS) and al-Qaeda are currently involved in an intense competition. Though the groups share the same end goal—the creation of a global caliphate ruled by a strict version of sharia (Islamic law)—the two groups' strategies for attaining this goal are very different. Al-Qaeda has attempted to soften its image in recent years, particularly since the onset of revolutions in the Middle East and North Africa and has largely adhered to a Maoist revolutionary strategy, which prioritizes the development of political bases of support over the initiation of military action. As it develops this base of support, al-Qaeda also seeks to reduce its exposure to counterinsurgent forces: Thus, the group maintains a relatively low public profile, makes use of front groups with no explicit organizational connection to al-Qaeda, pursues a cautious military strategy, and adopts a gradualist, population-centric approach to religious governance.

Al-Qaeda's deliberate approach stands in stark contrast to IS's hyper-aggressive strategy. IS's approach resembles the Focoist model of revolutionary warfare, which holds that the political foundation necessary for revolution can be crafted through violence. In order to distinguish itself from, and demonstrate its superiority over, al-Qaeda, IS has advertised and sometimes exaggerated its military exploits. It engages in shocking brutality, a technique that has definite risks but is also designed to foster a perception of strength and a perception that IS possesses constant momentum. By presenting itself as the more successful jihadist group, IS seeks to attract the support and allegiance of al-Qaeda affiliates, unaligned jihadist groups, and foreign fighters. Attracting this cohort of supporters will in turn allow IS to sustain its global expansion efforts, which are integral to the group's success.

The competition between IS and al-Qaeda has fundamentally reshaped the jihadist environment globally. IS has challenged al-Qaeda's dominance over the jihadist movement. Thus far, al-Qaeda has responded not by mimicking IS, but rather by continuing to pursue its Maoist-style strategy, and even attempting to "rebrand" by contrasting itself to IS's over-the-top violence. Al-Qaeda has presented itself to both Sunni states and local Sunni populations as a more reasonable and controllable alternative to IS. As IS and al-Qaeda continue to pursue their divergent strategies, the future of the jihadist movement, and the security of the Middle East and North Africa, hangs in the balance.

INTRODUCTION

On November 13, 2015, a team of terrorists affiliated with the militant group known as the Islamic State (IS) launched a dramatic spree of deadly attacks around Paris.[1] They struck six targets, including a concert hall packed with over a thousand people, and by the end of the night over 120 civilians had been killed and more than 350 wounded.[2] It soon became apparent that the Paris attacks were aimed not only at IS's "crusader" enemies in Europe, but also another adversary: al-Qaeda, IS's archrival in the jihadist community. Immediately after the Paris attacks, IS launched a propaganda blitz against al-Qaeda, quickly releasing two videos directed at al-Qaeda in the Arabian Peninsula (AQAP), al-Qaeda's Yemen-based affiliate, in which IS called on AQAP members to defect to IS. IS claimed that it deserved other jihadists' loyalty, as it proved that it was capable of "terroriz[ing] infidels everywhere," from Paris to Beirut and Bangladesh.[3] IS's legion of social media supporters circulated the videos, with some operatives starting a hashtag on Twitter—"Messages to Al-Qaeda in Yemen"—even before the videos were released publicly. The aftermath of the Paris attacks shows that IS, even as it mounts devastating attacks against the West, constantly keeps its rivalry with al-Qaeda in mind.

For almost two decades, al-Qaeda was universally recognized as the world's dominant salafi jihadist militant group. Al-Qaeda's competition against its enemies until 2013-14 can be understood conceptually as a two-player game: Al-Qaeda represented salafi jihadism, and its opponent was all countries and actors who opposed, or failed to live up to, its hardline and puritanical vision of Islam. This two-player dynamic has changed as a result of the dramatic growth of IS, which had previously been al-Qaeda's Iraq-based affiliate. There are significant differences between the two groups. For one, IS is more technology-savvy than al-Qaeda; it understands social media's ability to mobilize people to its cause on an unprecedented scale, a dynamic that has helped IS connect with a younger demographic. IS also expects to experience success in a shorter timeframe than al-Qaeda: While al-Qaeda developed a long-term strategy

designed to flout operations against it by appealing to and becoming an organic part of local populations, IS thought the time was ripe to capture significant territory, crush its foes, and declare the caliphate's reestablishment.

With similar ideologies and a common objective of creating a caliphate that would be ruled by a strict version of sharia (Islamic law), al-Qaeda and IS now find themselves locked in a fierce competition. What had once been a two-player game now has been transformed into a three-player game.[4] Al-Qaeda's strategy, built for a two-player game, was disrupted when another salafi jihadist competitor emerged that exploited the vulnerabilities inherent to al-Qaeda's deliberate approach, and portrayed al-Qaeda's patience as indecisiveness. Al-Qaeda and IS are now competing fiercely for affiliates and recruits. Indeed,

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The New York Times reported in August 2015 that "top intelligence, counterterrorism and law enforcement officials" in the United States are now deeply divided over which of these two groups "poses the biggest threat to the American homeland."[5]

This study explores the strategic competition between IS and al-Qaeda. We place the two groups

and their competition within a broader theoretical and historical framework by examining them as revolutionary movements. In the classic volume *Makers of Modern Strategy*, John Shy and Thomas Collier define revolutionary war as "the seizure of political power by the use of armed force," with the additional characteristics "that the seizure of power is by a popular or broad-based political movement, that the seizure entails a fairly long period of armed conflict, and that power is seized in order to carry out a well-advertised political or social program."[6] A number of authors, including David Kilcullen and Michael Vlahos, have explicitly adopted the framework of understanding jihadist actors as revolutionaries in their analysis of al-Qaeda.[7] Stathis Kalyvas, a noted scholar of civil wars, has recently proposed that IS should be considered a revolutionary movement as well.[8]

The two groups differ in their approach to revolution. Al-Qaeda favors covert actions, unacknowledged affiliates, and a relatively quiet organizational strategy to build a larger base of support before it

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is ready to engage in a larger scale of conflict with its foes. IS, in contrast, believes that the time for a broader military confrontation has already arrived. The group combines shocking violence with an effective propaganda apparatus in an effort to gain further support from its bloody successes. A useful framework for understanding these groups' strategies can be found by contrasting the Maoist and Focoist schools of revolutionary thought. Al-Qaeda exhibits

a revolutionary strategy that is both implicitly and explicitly based on the works of Mao Tse-tung,[9] whereas IS possesses a strategy that is more consonant with the Focoist writings of Ernesto "Che" Guevara and Régis Debray.

Mao's theory of revolution is rooted in the primacy of politics over warfare. His first two principles are "arousing and organizing the people," and "achieving internal unification politically."[10] In Mao's paradigm, these two steps, which constitute his first stage of revolutionary warfare, must occur before the initiation of military action, covert or otherwise. Mao's first stage—that of organization, consolidation, and preservation—is followed seamlessly by a stage of progressive expansion, followed by a third and final stage of decision, or the destruction of the enemy. Only upon a steadfast political foundation, in Mao's view, can guerrilla forces create bases for logistics and operations, and slowly build strength and momentum for the final conventional stage of warfare. Mao rarely undertook strategic military offensives outside of areas that were prepared politically.[11]

Under Mao's theory of revolutionary warfare, the early stages do not terminate with the initiation of a new stage. Thus, Maoist revolutionaries continue to emphasize the political stage of organization and consolidation even as they pursue progressive expansion. Consistent with Maoist theory, al-Qaeda and its affiliates have focused on maintaining and expanding the group's political support. Even in areas where al-Qaeda has openly undertaken warfare, it has been somewhat restrained in its approach to civilian populations, and it has adopted a relatively slow and phased implementation of its hardline version of sharia where it has control or significant influence. Al-Qaeda's adherence to a Maoist framework was largely shaped by its experience of being hunted by the United States and its allies for a decade and a half.

Contrary to the Maoist approach is the Focoist approach to revolutionary war. First used successfully in Cuba in the 1950s, and attempted unsuccessfully many times since, Focoism holds that the political foundation necessary for revolution can be crafted through violence. Guevara essentially flipped Mao's theory by arguing that the use of violence against the state could inspire the peasants to rise up too—and

this general uprising could usher in political purity.[12] Focoism, unlike Mao's strategy, accepts great risks in order to inspire support. IS has in many ways followed the Focoist model. It believes in the power of violence to forge the political opinions of the Muslim masses. IS views al-Qaeda's slower and more deliberate Maoist approach, which awaits the proper political formation of the people, as too slow. IS is willing to take significant risks for propaganda purposes, and is happy to win today and lose tomorrow if today's win creates a large enough subject for propaganda.

This framework of Maoist versus Focoist models of revolutionary warfare should not be seen as a complete explanation for either al-Qaeda or IS's behavior. Neither group is perfectly Maoist or Focoist, but they can be understood as largely adhering to one of these two revolutionary paradigms on the whole.[13] One virtue of the framework we present is that it places al-Qaeda and IS within the broader revolutionary history in which they reside, and in that way helps to illuminate certain aspects of their respective strategies and flesh out potential outcomes of their competition.

Examining the implications of the two groups' approaches to revolutionary warfare, al-Qaeda's use of Maoist strategy is designed to be low-risk and to yield long-term results. This is consistent with al-Qaeda's conception of its conflict with the West as both existential and also generational in nature. The group has taken steps to ingratiate itself with local populations and reduce its exposure to counterrevolutionary forces. Al-Qaeda's affiliate in Syria, Jabhat al-Nusra, has even convinced some U.S. allies —including Qatar, Saudi Arabia, and Turkey— that it should be viewed as a partner in the fight against both IS and also Bashar al-Assad's brutal regime. The hardline coalition of which it is a part, Jaysh al-Fatah, openly receives support from several states in the region.[14] Indeed, the idea that "moderate" elements within Nusra—or even al-Qaeda itself—could be a bulwark against IS's further growth has even made its way into discourse in the West, though it has not driven U.S. policy.[15]

IS's use of a Focoist strategy is more high risk, and the group's extreme violence and imposition of repressive governance is certain to alienate populations under its control. The Islamic State's method of dealing with

this problem is to try to crush all opposition while it is still in its nascent stage, making an example of would-be opponents. The riskiness of this approach is the primary reason that Focoist revolutions have experienced very limited success other than the Cuban

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revolution: Focoism inherently exposes revolutionary forces to counterrevolutionaries, who are often better equipped.[16] IS's challenge is further bolstered by the fact that it is locked in combat with at least three nation-states (Iran, Syria, and Iraq) and four parastates (the YPG, the Kurdish Regional Government, Jabhat al-Nusra, and Hizballah) with state equivalent power that only lack state status as a matter of international legitimacy. But despite the Focoist approach's history of failure, this use of violence to inspire an uprising is important to IS both ideologically and strategically.

This study begins by examining how the experiences of IS's predecessor, al-Qaeda in Iraq (AQI), have shaped both groups' strategic outlooks. It then analyzes both groups' strategy—globally and regionally, vis-à-vis one another—and demonstrates how both groups have defined themselves in relation to their opponent. The study is designed to provide insight into the vulnerabilities that this competition creates for both IS and al-Qaeda—but also some of the unexpected opportunities that it has produced for them, especially

for al-Qaeda. It begins by exploring the strategic objectives of IS and al-Qaeda, including both groups' approach to violence and governance. Following this analysis of the two groups' approaches, we examine potential future outcomes of this competition.

THE IRAQ WAR AS FORMATIVE EXPERIENCE

The strategic doctrines of both al-Qaeda and IS have been heavily influenced by al-Qaeda in Iraq's (AQI) experiences in Iraq in the mid-2000s. AQI ascended rapidly to the fore of the global jihadist movement and then burnt out just as quickly, scorching al-Qaeda's image as well. AQI's early success during the U.S. occupation derived in part from its ability to spark sectarian strife through waves of attacks into Shia areas; AQI correctly believed that it could interject itself into a sectarian civil war by presenting itself as the Sunnis' protector. Yet even while it offered protection from the Shia reprisals that it had provoked, the group oppressed Sunnis by imposing an alien form of religious law through its reign of terror in Anbar province. This strategy was successful in the short term; an intelligence assessment written in August 2006 described AQI as the "dominant organization of influence" in Anbar.[17] It also wielded significant power in West Baghdad, Mosul, Diyala, and elsewhere.

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AQI's proclivity for brutality and indiscriminate violence raised concerns within al-Qaeda's senior leadership (AQSL), which feared that AQI would alienate Iraqis. Members of AQSL sent at least two letters—from then-deputy emir Ayman al-Zawahiri and masul aqalim (head of regions) Atiyah Abd al-Rahman—to AQI's emir Abu Musab al-Zarqawi exhorting the hotheaded Jordanian to moderate his approach. Zawahiri reprimanded Zarqawi for his videotaped beheadings of victims, warning the former street thug not to "be deceived by the praise of some of the zealous young men and their description of you as the shaykh of the slaughterers."[18] Both Zawahiri and Atiyah emphasized the need to win over the population, with Atiyah instructing Zarqawi to gain Iraqis' support in a gradualist manner by "lauding them for the good they do, and being quiet about their shortcomings."[19]

The objections offered by Zawahiri and Atiyah were driven by strategic, rather than moral, considerations. Indeed, Zawahiri noted that rather than beheading AQI's prisoners, "we can kill the captives by bullet."[20] The preeminence of strategic over moral concerns can be discerned in al-Qaeda's activities following the Iraq war. As the group tried to alter its image, which had been damaged by AQI's excesses, it did not avoid atrocities.[21] Rather, al-Qaeda appears more concerned with keeping them off-camera, and minimizing negative attention.

Zarqawi disregarded AQSL's instructions, and after a period of repression, the Sunni population in Anbar rebelled in a tribal uprising known as the Sahwa (Awakening) movement. The Sahwa soon spread to other provinces through a program known as the "Sons of Iraq." At its height, more than a hundred thousand predominantly Sunni Iraqis took part in this program. Along with a "surge" in U.S. troops and America's shift to population-centric counterinsurgency, the Sahwa movement contributed to AQI's downfall. By the time General David Petraeus and Ambassador Ryan Crocker testified before the U.S. Congress in September 2007, the changes on the ground had already become apparent: The Awakening movement had helped to significantly improve Anbar,

transforming it from the dark days in which AQI was the dominant actor. General Petraeus said that Anbar had become "a model of what happens when local leaders and citizens decide to oppose al Qaeda and reject its Taliban-like ideology."[22] The Sahwa's success amounted to a repudiation of AQI—and by extension, of al-Qaeda itself.

The damage done by AQI and its successor organizations was so severe that in January 2011 Adam

Gadahn, an American-born al-Qaeda media strategist, wrote a letter arguing that al-Qaeda should cut ties with its Iraqi branch.[23] Gadahn contended that if al-Qaeda did not expel AQI, al-Qaeda's "reputation will be damaged more and more as a result of the acts and statements of" that group, "which is labeled under our organization."

There is no indication that Gadahn's suggestion was seriously entertained at the time. Nonetheless, AQI's excesses and ultimate defeat during this period heavily influenced the strategy that al-Qaeda would adopt when the Arab Spring protests struck the Middle East and North Africa. AQSL viewed AQI's defeat as a repudiation of the group's approach, while it saw the U.S.'s population-centric approach as a success. Consequently, in other regions where al-Qaeda had a recognizable presence, it began to adopt a more population-centric approach in the wake of the Iraq war. IS did not share this conclusion: It viewed Zarqawi as a founding father who was above reproach. IS's continued adherence to Zarqawi's approach would drive its tensions with its parent organization and contribute to its eventual expulsion from al-Qaeda's network. And IS's approach following its split from al-Qaeda, when it reached unprecedented levels of success, continued to be driven by Zarqawist principles.

THE POST-ARAB SPRING OBJECTIVES OF AL-QAEDA AND IS

Al-Qaeda's Strategic Objectives

The post-Arab Spring environment has proven to be a major inflection point in al-Qaeda's global strategy. The new environment ushered in by the successful revolutions in Tunisia, Egypt, and Libya, and the unsuccessful revolution in Syria, has provided al-Qaeda with two major opportunities. The first opportunity is that the regional upheaval created a growth environment for jihadism. Al-Qaeda has sought to exploit this by establishing a significant presence in places where it had previously been suppressed.

The second opportunity is that al-Qaeda perceived an opening to repair its damaged image as it expanded into new areas, where the population was seeing al-Qaeda (perhaps operating under the name of a front group) for the first time.

The organizational methodology that al-Qaeda formulated for this post-Arab Spring environment is designed to pursue two key objectives. First, al-Qaeda has implemented a population-centric approach—including use of gradualism and cooperation with local actors—in order to increase its base of popular

support. Second, al-Qaeda made copious use of clandestine efforts and tailored popular front groups (like Ansar al-Sharia in Tunisia, which will be discussed further later in this report) in its expansion. This was intended to reduce the organization's exposure to counterinsurgent forces, including the United States and the Middle East's Sunni regimes, and to avoid frightening or alienating local populations.

Popular Support

Popular support has become essential to al-Qaeda's organizational survival and growth. While al-Qaeda once conceptualized itself as exclusively a vanguard movement, the group has come to view itself in recent years as a popular movement that needs the support, or least the acquiescence, of the populace. This transformation had begun prior to the Arab Spring, as the letters that Zawahiri and Atiyah wrote to Zarqawi in 2005 recognize the importance of the population

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to jihadist groups. However, the transformation of al-Qaeda into a more broad-based movement was supercharged by the Arab Spring, which demonstrated the power of the masses in affecting change and provided a critical opening for greater jihadist penetration.

It is worth noting how the concept of popular support figured in al-Qaeda's rhetoric and thought prior to the Arab Spring. Al-Qaeda's relationship to the populace stood at the center of AQSL's dispute with Zarqawi in the 2005-06 period. In his letter to Zarqawi, Zawahiri explained the importance of public support at some length:

> If we are in agreement that the victory of Islam and the establishment of a caliphate

in the manner of the Prophet will not be achieved except through jihad against the apostate rulers and their removal, then this goal will not be accomplished by the mujahed movement while it is cut off from public support, even if the Jihadist movement pursues the method of sudden overthrow. This is because such an overthrow would not take place without some minimum of popular support and some condition of public discontent which offers the mujahed movement what it needs in terms of capabilities in the quickest fashion. Additionally, if the jihadist movement were obliged to pursue other methods, such as a popular war of jihad or a popular intifadah, then popular support would be a decisive factor between victory and defeat. In the absence of this popular support, the Islamic mujahed movement would be crushed in the shadows, far from the masses who are distracted or fearful, and the struggle between the Jihadist elite and the arrogant authorities would be confined to prison dungeons far from the public and the light of day.[24]

In a separate section of the letter, Zawahiri again underscored the importance of popular support, noting that "the strongest weapon which the mujahedeen enjoy—after the help and granting of success by God—is popular support from the Muslim masses in Iraq, and the surrounding Muslim countries. So, we must maintain this support as best we can, and we should strive to increase it."[25]

During the period that AQI's excesses were in fact spurring Iraqi Sunnis to revolt against it, al-Qaeda's ideologues were able to read the warning signs clearly. In a letter written in early 2007 that was later recovered from bin Laden's compound in Abbottabad, Pakistan, an unidentified jihadist leader of Egyptian origin warned that if AQI operatives "continue using techniques such as this [i.e., indiscriminate attacks on civilians], they will spoil [things and] alienate the people, who could be won over by enemy after enemy."[26] And the soul-searching intensified following AQI's defeat, as reflected in the aforementioned letter Adam Gadahn wrote urging al-Qaeda's dissociation from AQI.

AQSL decided to make changes to ensure that other branches of the organization would not repeat AQI's errors, and to regain the trust and support of local populations. In a letter that Atiyah wrote to Nasir al-Wuhayshi, the emir of AQAP, he noted that "the people's support to the mujahedin is as important as the water for fish," making reference to Mao Tse-tung's famous adage that "the guerrilla must move amongst the people as a fish swims in the sea."[27] Pointing to AQI as a cautionary tale, Atiyah encouraged Wuhayshi to "study all the mujahidin's attempts and efforts to learn from their mistakes," and to avoid targeting tribal members when doing so would result in conflict with a local tribe. Wuhayshi in turn transmitted a similar message to al-Qaeda in the Islamic Maghreb's (AQIM) leadership, illustrating al-Qaeda's coordinated efforts to forge a new approach.[28]

The most significant example of these changes came in September 2013, when Zawahiri released a document entitled "General Guidelines for Jihad" that made public al-Qaeda's new population-centric approach.[29] Zawahiri instructed affiliates to avoid conflict with Middle Eastern governments when possible, asserting that conflict with local regimes would distract from efforts to build bases of support. Zawahiri also instructed affiliates to minimize violent conflict with Shias and non-Muslims in order to prevent local uprisings, and to abstain from attacks that could result in Muslim civilian casualties. A purportedly leaked letter that Zawahiri wrote to the Islamic State's caliph Abu Bakr al-Baghdadi in September 2013 notes that the General Guidelines were distributed to all of al-Qaeda's affiliates for review prior to their publication to allow for comments and objections, thus suggesting the document represents the unified policies of al-Qaeda as a whole.[30]

Consonant with these changes to al-Qaeda's operations, the organization also prioritized a "rebranding" campaign designed to alter its public image. This rebranding campaign was an organizational focus even before the Arab Spring began. Documents recovered from bin Laden's Abbottabad compound reveal that an unnamed al-Qaeda official had discussed changing al-Qaeda's name to something that would resonate more with the ummah (worldwide body of Muslims). As the official noted, al-Qaeda's name (which literally means the

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base in Arabic) had become identified with "a military base with fighters without a reference to our broader mission to unify the nation."[31] Bin Laden similarly wanted to change the group's public image. In May 2010, he argued in a letter to Atiyah that al-Qaeda should enter a "new phase" that prioritized the battle for popular support.[32] The events of the Arab Spring further reinforced the importance of popular support for the jihadist movement, showing that popular mobilization could topple long-standing regimes.

Reducing Exposure to Counterinsurgent Forces

Al-Qaeda's covertness strategy—including its use of front groups—and its embrace of a relatively low-key public profile are also related to the group's efforts to evade counterinsurgent forces. Among other things, al-Qaeda's maintenance of clandestine relationships with its undeclared branches is a deliberate effort to minimize the attention that the al-Qaeda network receives from adversaries.

The U.S.'s ability to quickly topple the Taliban in Afghanistan and Saddam Hussein's regime in Iraq was instructive in shaping al-Qaeda's preference for covertness. The jihadist group realized that the United States—even when "exhausted," as Atiyah described America after its protracted war against the jihadist movement—retained the "strength to destroy an Islamic state in the region."[33] Bin Laden made this rationale for preferring covertness explicit in one of the letters he wrote in Abbottabad. He noted that when a branch's affiliation with al-Qaeda "becomes

declared and out in the open," that causes the group's enemies to escalate their attacks on it. He pointed to the civil wars in Iraq and Algeria as examples of this phenomenon.[34] Even if al-Qaeda's enemies would inevitably discover the network's relationship with one of its branches, bin Laden stated that "an official declaration remains to be the master for all proof."[35]

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Al-Qaeda's covert and deliberate approach allows the group to quietly build its network, waiting until its adversaries have been weakened before revealing its full strength.

Al-Qaeda's Approach in Practice: Post-Revolutionary Tunisia

Al-Qaeda's approach to Tunisia perhaps best illustrates how the group's theoretical framework for the post-Arab Spring environment worked in practice. Al-Qaeda's strategists quickly recognized that the changes gripping the region provided a new set of opportunities. In addition to producing the kind of widespread instability that can help a militant movement that harbors rigid utopian principles to carve out a foothold, al-Qaeda's strategists foresaw unprecedented opportunities to undertake dawa (evangelism).[36] This is because, while pre-Arab Spring political regimes placed strict restrictions on religious expression, strategists foresaw that fewer restrictions would exist in the political environment

that immediately followed the revolutions. This would create new opportunities for a wide range of Islamist groups, ranging from moderate political Islamists to hardline salafi jihadists, to disseminate their views to the general public.

Many al-Qaeda leaders spoke of the possibilities for dawa in the post-Arab Spring environment. Zawahiri publicly remarked upon the "opportunity for advocacy and statement" that existed in post-revolutionary Tunisia and Egypt.[37] Bin Laden also recognized this opportunity, advising jihadists in one of his few statements on the Arab Spring to "spread the correct understanding, as the current conditions have brought on unprecedented opportunities."[38] Atiyah described the Arab Spring as a "historical opportunity," and called on jihadists to "spring into action and initiate or increase their preaching, education, reformation and revitalization in light of the freedom and opportunities now available in this post revolution era."[39] Shaykh bin Mahmud, a regular contributor to jihadist forums, exhorted jihadists in Tunisia to "win the Tunisian people and quickly," noting that the Tunisians "are naturally loving of their religion, and the manifestations of immorality in Tunisia are the work of a minority."[40] While al-Qaeda possesses reasons for undertaking dawa that are independent of Maoist principles, this opening to spread the group's ideas fit neatly within Mao's paradigm for the first stage of revolutionary warfare.

Al-Qaeda theorists explicitly understood that dawa would help to build the organization's popular base of support and pave the way for military confrontation in the future. Jihadist writer Hamzah bin Muhammad al-Bassam, while urging a focus on dawa in the near term, articulated the ultimate need for the movement to engage in violence. Without violence, he reasoned, salafi jihadism would find itself as just one of a number of different "intellectual trends."[41] The Ansar al-Mujahedin Network advised "acquiring and storing arms in safe locations known only to one who is trustworthy and on the solid, right path" even during the stage of dawa.[42]

Al-Qaeda's efforts in Tunisia exemplified its early post-Arab Spring strategy. Jihadist expansion in Tunisia originally occurred through dawa efforts spearheaded by an al-Qaeda front organization called Ansar al-

Sharia in Tunisia (AST).[43] AST was publicly established when several high-profile salafi jihadists who had been imprisoned by dictator Zine El Abidine Ben Ali's regime were released from prison after he was overthrown.[44]

AST initially focused most of its resources on dawa, emphasizing visibility as it undertook these efforts.[45] AST made its presence felt in some rather traditional ways, including holding dawa events at markets or universities, holding public protests, and dominating physical spaces, such as cafés, near places of worship. Two of the group's innovations were its provision of social services to Tunisians (which can be seen as an extension of AST's dawa efforts) and the group's use of social media—even before IS's emergence—to advertise its activities.

AST's social services activity included the distribution of food, clothing, and basic supplies, as well as sponsorship of convoys that provided medical care and medicine.[46] These efforts concentrated on areas that are typically neglected by the government, such as rural and impoverished areas. AST's provision of social services typically was accompanied by distribution of literature designed to propagate its ideology. These efforts would not reach the same areas consistently—which is where AST's use of social media became particularly relevant. Almost immediately after it undertook humanitarian efforts, AST would post information about its latest venture, including photographs, to its Facebook page and other websites. Social media served as a force multiplier, illustrating a rapid pace of humanitarian assistance and thus helping the group achieve its goal of visibility. AST's objectives in carrying out these activities were to build the organization's support base and to win the sympathies of the Tunisian population.

As AST's dawa activities gained traction, the group began to engage in violence. The first form of violence in which the group engaged is hisba, which relates to the Islamic concept of "commanding right and forbidding wrong."[47] As the scholar Michael Cook explains in a comprehensive study, the well-known Sunni scholar Ghazzali (d. 1111) "adopted the word hisba as a general term for 'forbidding wrong.'"[48] Salafi jihadist groups, including both al-Qaeda and IS, believe that hisba necessitates violence—though

al-Qaeda counsels a more gradualist approach to the use of violence.

AST was clearly involved in a wave of hisba violence that became undeniable in Tunisia by late 2012.[49] It is difficult to determine attribution for these vigilante attacks, given that most of them went unclaimed, but given the scale of violence it is likely that AST wasn't the only actor carrying out hisba attacks, but rather that salafists unaffiliated with the organization were doing so as well. AST did not claim credit for any such attacks despite its involvement in them. By targeting perceived enemies of the faith, and not making the attacks all about AST, the group sought to create the perception that this violence was organic to the Tunisian people.

Indeed, Tunisia's earliest post-revolution hisba violence focused on a target that would be widely considered acceptable by those inclined toward religious fundamentalism: female prostitutes. Though maisons closes (brothels) have been legal in Tunisia since 1942, in February 2011 a crowd of "several hundred outraged citizens" gathered near a maison close in Tunis on a Friday, the Muslim day of prayer, to protest the presence of prostitutes.[50] The protesters came armed with "sticks and torches in hand," but were stopped by both the Tunisian military and "a militia of pimps, porters and day laborers."[51] These

> **Jihadist expansion in Tunisia originally occurred through dawa efforts spearheaded by an al-Qaeda front organization called Ansar al-Sharia in Tunisia (AST).**

attacks quickly spread, with maisons closes being set aflame in Kairouan, Médenine, Sfax, and Sousse.[52] During some of these attacks, the prostitutes were beaten.

Later targets of hisba violence included symbols of modernity and secularism, including establishments that served alcohol and television stations and cinemas that showed content that could be deemed

> **IS's approach is the opposite of al-Qaeda's: while al-Qaeda has deliberately sought to minimize the amount of attention it receives in order to reduce its exposure to counterinsurgents, IS is boisterous, constantly seeks the media spotlight, and touts its victories (real or invented) at every opportunity.**

impermissible or blasphemous.[53] Salafists also targeted women for dressing immodestly.[54] During these initial stages, the public acts of violence did not cross a line and provoke a government crackdown. AST was thus able to continue expanding its influence through dawa even while it began to employ violence within the country.

From there, AST graduated to jihad violence, which is warfare against the group's enemies, rather than internal cleansing of the Muslim community. Initially AST's efforts focused on carrying out jihad abroad, facilitating Tunisians' travel to foreign battlefields in places like Syria, Libya and Mali.[55] As with the group's gradual escalation in violence, this was designed to build up AST's military capabilities while allowing it to continue expanding its political base. However, by 2013 AST had turned its guns against the Tunisian homeland.

AST members were blamed for the assassination of two high-profile secularist politicians that year, Chokri

Belaïd and Mohammed Brahmi. The latter man was killed on July 25, and less than a week later—on July 29—a jihadist ambush in Jebel el-Chaambi killed eight soldiers, five of whom had their throats slit.[56] These two bloody incidents, occurring in such close proximity to one another, constituted a point of no turning back for the Tunisian government, and in August 2013 it designated AST a terrorist organization and initiated a crackdown on the group.[57]

It is not clear that AST's leadership wanted the group's violence to escalate so quickly. Indeed, it seems that the group had not progressed far enough in its political stage (what we might consider the Maoist stage of organization, consolidation, and preservation) by July 2013 to justify the initiation of open warfare against the state. By design, AST gave local branches considerable autonomy, which may have contributed to violence escalating faster than AST's core leadership wanted or anticipated.[58] But while the progression of AST's activities may have occurred in a manner that exceeded the leadership's intentions, al-Qaeda's blueprint for Tunisia nonetheless demonstrates how its plans for the post-Arab Spring environment followed Maoist insurgent principles.

IS's Strategic Objectives

In its bid for supremacy over the global jihadist movement, IS has formulated a strategy against al-Qaeda that centers on two techniques: (1) portraying al-Qaeda's slower and more deliberate strategy as weakness and indecisiveness, and (2) appealing to al-Qaeda's affiliates by emphasizing its own momentum and expansion, with the aim of poaching groups, members, and potential recruits from al-Qaeda. In essence, IS's approach is the opposite of al-Qaeda's: while al-Qaeda has deliberately sought to minimize the amount of attention it receives in order to reduce its exposure to counterinsurgents, IS is boisterous, constantly seeks the media spotlight, and touts its victories (real or invented) at every opportunity. In doing so, IS is positioning itself as an alternative for jihadists who may be dissatisfied with the drawn-out nature of al-Qaeda's strategic doctrine, or with their position in the al-Qaeda organization. IS utilizes a highly advanced social media apparatus that helps the group broadcast its message, gain recruits, and undermine al-Qaeda's position.

The five phases of the caliphate's creation. Source: Dabiq Issue One

Because IS was born out of the al-Qaeda network, the organization has unique insights into al-Qaeda's strategy, enabling it to try to transform al-Qaeda's strategic methods into weaknesses. As previously explained, although al-Qaeda's methodical strategy appears to be effective against its state opponents in what we might call a two-player game, its approach is vulnerable to disruption by a rival jihadist group— especially one like IS that possesses superior media capabilities. IS's significant advantages in the jihadist social media sphere have helped the group to in turn dominate the news media, which often looks to social media for clues about the latest jihadist goings-on.

Currently two of IS's major strategic objectives in its conflict with al-Qaeda are expansion and consolidation of the caliphate and gaining new affiliates abroad through the proliferation of "provinces" (wilayats).

Expansion and Consolidation of the Caliphate

In the first issue of its English-language magazine Dabiq, entitled "The Return of Khilafah," IS presents a chart illustrating the five phases necessary to achieve a caliphate. The first step, the hijrah (migration) phase, involves the immigration of mujahedin to an area with weak central governance, where the organization can base its operations. This is intended to create a chaotic environment where the local government becomes unable to execute control over the territory, thus allowing the militants to thrive. The second phase, Jama'ah (group), involves an escalation in the frequency of the mujahedin's attacks, thus leading directly to IS's third phase, the complete collapse of state governance in large swaths of territory. IS claims that this will create a state of tawahhush (mayhem), at which point the mujahedin can fill the power vacuum by creating an "Islamic state." This roadmap is ultimately designed to produce the ultimate phase, Khilafa, in which the caliphate is established. According to IS, this "has always been the roadmap towards Khilafah for the mujahidin."[59] Importantly, this ultimate phase is one that al-Qaeda's methodology has never been able to reach—and, IS argues, is not capable of reaching. The establishment of the caliphate is thus a central achievement for IS, one that clearly sets the group apart from al-Qaeda.

As IS tries to continue expanding the territory it controls through military means, the group also consolidates its gains through an administrative apparatus and heavy-handed implementation of sharia.[60] IS's approach to sharia implementation is markedly different from al-Qaeda's, and IS has harshly criticized al-Qaeda for focusing on fostering popular support and tailoring sharia to meet the needs of local populations. Indeed, IS claims that al-Qaeda has abandoned true Islamic principles by giving "preference to popularity and rationalization."[61] In this way, IS argues, al-Qaeda "became embarrassed of acknowledging undeniable sharia fundamentals such as takfir [excommunication]."[62] IS has warned that al-Qaeda's emphasis on popular support would leave in place the system that both groups claim to be fighting against, as al-Qaeda's method "would neither eliminate a taghut nor remove injustice from the necks of the people."[63] IS claims that rather than implementing sharia, al-Qaeda instead "set up 'shar'i' and 'mutual' committees and courts that were 'planning'—for more than two years—to implement the Shari'ah but would not execute the hudud."[64]

Gaining New Affiliates Abroad

IS has been actively trying to poach affiliates from al-Qaeda in order to expand its network and foster the perception that al-Qaeda is an organization in decline. Africa has been a central battleground where IS has gone after al-Qaeda affiliates, as IS has worked to foster the perception that it has a strong presence on the continent. IS has similarly trumpeted its expansion into Yemen—a move that appears to be driven less by its possession of a strong on-the-ground presence than by strategic considerations related to its competition with al-Qaeda. Yemen is the stronghold of al-Qaeda's most important branch, AQAP, and challenging AQAP's supremacy in Yemen would be of significant value to IS.

IS's affiliate strategy will be explored in more depth later in this report.

ELEMENTS OF STRATEGY FOR IS AND AL-QAEDA

IS and al-Qaeda have adopted distinct strategies in their global competition. IS has sought to publicize its gains and military successes, while also utilizing coercive tactics to impose a harsh version of sharia law upon local populations that it seeks to govern. Conversely, al-Qaeda has downplayed its victories, assimilated into local political environments, and pursued a population-centric governance model. This section examines three areas where the strategic preferences of IS and al-Qaeda diverge: governance, military tactics, and relationships with affiliates and allied jihadist organizations.

Governance, *Sharia*, and the Utility of Violence

IS and al-Qaeda take different approaches to governance, sharia, and the utility of violence. IS places the use of violence and immediate, coercive implementation of sharia at the center of its governance policies, putting these policies in place anywhere it has enough fighters to impose the group's will. In contrast, al-Qaeda often will choose not to seek to govern in areas where it is militarily strong. Consonant with its strategy of appearing to be an organic part of the local landscape, in areas where branches of al-Qaeda do govern territory—such as Syria and Yemen—these branches often do so as a part of coalitions or front groups. Al-Qaeda favors a slow introduction of sharia and disavows unnecessary overt violence.

IS's Use of Violence in Governance

IS's ability to impose governance where it enjoys military power is essential to the group's mission, as the caliphate's legitimacy is predicated on IS's ability to implement laws and otherwise function as a state.

Following its capture of territory in Iraq and Syria, the organization quickly announced the imposition of sharia. It further issued calls for the emigration of doctors, engineers, judges, and specialists in Islamic law, a symbol of its state-building project.[65] In doing so, the group seeks to portray itself as a state entity that provides basic services and a modicum of security to citizens living inside the caliphate.

Screen capture from IS's video "Health Services in the Islamic State – Wilayat al-Raqqa"

IS's media apparatus, including its strong social media machine, has been a key component of the group's efforts to demonstrate that it provides basic services to citizens in the caliphate. Several of IS's propaganda videos feature scenes depicting day-to-day life, including children going to school, factory workers bagging wheat, and civilians shopping at outdoor markets. IS has released photos and videos of its doctors treating children, and has propagandized about the state's ability to provide medicine and psychiatric services. In one video, the group shows the "Islamic State Fire Brigade" rushing to the scene of a bombing, police patrolling the streets, and a sharia court.[66]

However, independent accounts from IS's two key urban holdings of Mosul and Raqqa City tell a very different story than does IS's propaganda, including the collapse of infrastructure, a severe deterioration in quality of life, and fuel and food shortages. In much of the territory IS controls, social services are rudimentary or non-existent; the public supply of water and electricity is limited to only a few hours

per day, food stocks are limited, and gas prices have skyrocketed.[67] Public infrastructure in the caliphate is deteriorating and quality of life for Iraqis and Syrians living in IS-controlled territory has declined considerably. *The Washington Post* reported a dire situation in areas under IS's rule that contradicts the group's rosy propaganda:

> Services are collapsing, prices are soaring, and medicines are scarce in towns and cities across the "caliphate" proclaimed in Iraq and Syria by the Islamic State, residents say, belying the group's boasts that it is delivering a model form of governance for Muslims.... Slick Islamic State videos depicting functioning government offices and the distribution of aid do not match the reality of growing deprivation and disorganized, erratic leadership, the residents say. A trumpeted Islamic State currency has not materialized, nor have the passports the group promised. Schools barely function, doctors are few, and disease is on the rise.[68]

IS's inability to provide a reasonable quality of life exposes a vulnerability in its strategy. This deficiency presents a major challenge to IS being seen as running a legitimate state. Indeed, IS's opponents argue that the group's governance failures undermine its claims of religious legitimacy. The Baghdad-based Association of Muslim Scholars (AMS)—a mainstream Muslim organization rather than one affiliated with al-Qaeda—noted in a July 2014 statement that the requirements of an Islamic state or caliphate include "laying the cornerstones for administrative institutions according to the new system, having a realistic structure for the state, and the state's ability to impose the system it adopts and to provide people with their basic needs, among other things."[69] AMS argued that IS failed to fully consider all the factors that are necessary for establishing the caliphate.

Rather than building public support prior to implementing its austere version of sharia, IS quickly implements hudud punishments. As such, coercive violence is a major component of IS's strategy for governance. The organization has thrown people suspected of being gay off of roofs, beheaded those it deems traitors or apostates, cut off the hands of

thieves, and stoned to death women accused of adultery.[70] Nor does this even begin to describe the more macabre tactics IS has employed, including burning men alive in Raqqa City, Baghdad, and Mosul.[71] The group's rapid and bloody implementation of its system of laws stands in contrast to al-Qaeda's gradualist approach, which emphasizes a process of preparing the population ideologically before implementing sharia.

Al-Qaeda's Gradualist Model of Governance

In territories al-Qaeda's affiliates govern, the group has adopted a slower and more methodical imposition of sharia. The group's guidelines for implementing sharia emphasize a population-centric, pragmatic approach. Al-Qaeda leaders have instructed affiliates to tailor the implementation of sharia to local conditions, taking into consideration local customs and religious practices. One facet of al-Qaeda's gradualism is first laying the foundations for sharia by spreading its understanding of the faith through dawa. Finally, al-Qaeda has encouraged its affiliates to implement

> **Al-Qaeda leaders have instructed affiliates to tailor the implementation of sharia to local conditions, taking into consideration local customs and religious practices.**

sharia flexibly in its initial phases, and to ignore minor transgressions during that period (though to punish them later, when religious methodology and al-Qaeda's power are more firmly established).

Al-Qaeda's strategists stress that the establishment of governance structures is an opportunity for jihadists to win over the "hearts and minds" of local populations. This outlook is evident from communications between Atiyah and Zarqawi, who largely disregarded the particularities of the local population in areas under AQI's control. In a letter to Zarqawi, Atiyah noted that "embracing the people and bringing them together and winning them over and placating them and so forth ... is a great way towards victory and triumph."[72] As such, Atiyah emphasized that al-Qaeda should conduct itself in a manner that would convince the population to "love us ... and sympathize with us, and [do things] which will fill it with affection, trust, and reassurance towards us."[73]

Al-Qaeda's "hearts and minds" governance strategy has several aspects. One central component, consistent with IS's own governance strategy, is the provision of services to local populations. In a letter to AQIM's emir Abdelmalek Droukdel, Wuhayshi outlined the strategic importance of service provision, noting: "Try to win them over through the conveniences of life and by taking care of their daily needs like food, electricity and water. Providing these necessities will have a great effect on people, and will make them sympathize with us and feel that their fate is tied to ours."[74]

The gradual implementation of sharia is also crucial to al-Qaeda's population-centric approach. Al-Qaeda encourages its affiliates to adjust sharia to local conditions, if only temporarily and for strategic reasons. Atiyah articulated the group's outlook on the application of sharia in his letter to Zarqawi, which noted that "our sharia allows [for a] wide scope, including keeping quiet and looking the other way until you have total power and control."[75]

Following this logic, al-Qaeda has instructed its affiliates to "educate" local populations on the laws of Islam before inflicting punishments for minor infractions. This approach is clearly outlined in Wuhayshi's letter to Droukdel, who was rebuked for the method in which sharia was implemented in northern Mali. Wuhayshi provided what was essentially a blueprint for bringing sharia to new areas:

> You have to take a gradual approach with them when it comes to their religious practices. You can't beat people for drinking alcohol when they don't even know the basics of how to pray. We have to first stop the great

sins, and then move gradually to the lesser and lesser ones. When you find someone committing a sin, we have to address the issue by making the right call, and by giving lenient advice first, then by harsh rebuke, and then by force. We have to first make them heed monotheism and fight paganism and sorcery, and then move on to enforcing punishments of great sins.... It's enough that the society is free of the great sins. As for the smaller sins and offenses, they have to be addressed gradually, with patience, leniency and wisdom.[76]

Al-Qaeda's senior leaders have been consistent in counseling this approach for over a decade. In Atiyah's letter to Zarqawi, he noted that in the early stages of governance affiliates should overlook many of the population's "mistakes and flaws, and while tolerating a great deal of harm from them for the sake of not having them turn away and turn into enemies on any level."[77]

In the previous two examples—Mali and Iraq under AQI—evidence of this gradualist approach emerged when AQSL assessed affiliates as departing from its guidelines, and rebuked them. But in Syria, though Nusra was accused of hastily implementing sharia early in the civil war, the group now appears to be adhering to al-Qaeda's governance blueprint. In areas it controls, Nusra has repealed bans on cigarette smoking and has adopted more lenient rules regarding dress codes for women.[78] Nusra has also begun to make public displays of punishing fighters who unjustly harm local residents, a sharp break from the group's earlier behavior, which included crucifixions, public beatings, and other acts of brutality against local populations.[79] This approach should not be mistaken for moderation on Nusra's part: There are compelling reports of the group's continuing extremism, especially in its treatment of religious minorities, but it has taken this approach where it will draw less attention and do less damage to Nusra's relationship with local populations.[80]

AQAP has also adhered to a population-centric governance approach in the parts of Yemen the group has overtaken since April 2015. In April, AQAP overtook Yemen's fifth-largest city, al-Mukalla, in the Hadramawt coastal region. After the city fell, AQAP appointed an umbrella group called the Sons of Hadramawt to police the city, and selected a local council to govern.[81] These moves appear designed to

> **IS is intent on maximizing the publicity from its military gains, whereas al-Qaeda has sought to obscure its connections with militant groups fighting in various theaters.**

reduce counterinsurgent pressure on AQAP, and also preserve existing tribal structures and customs in order to win over the population. AQAP has also been cautious in implementing sharia in Mukalla. AQAP denied rumors that it had banned music, claiming that tribes opposed to AQAP had spread these fictitious claims.[82]

Military Approaches

IS and al-Qaeda also have different military approaches. Both groups are capable of fighting conventional wars, and do so in various theaters. However, IS is intent on maximizing the publicity from its military gains, whereas al-Qaeda has sought to obscure its connections with militant groups fighting in various theaters. Further, in several theaters— including Syria, Yemen, and Libya—al-Qaeda has intermeshed its forces with militant groups regarded as more moderate, making al-Qaeda difficult to target with air power.

The Islamic State's Military Campaigns

In its military campaigns, IS employs an extremely aggressive approach to its territorial conquests. The group's willingness to employ force-on-force warfare has enabled it to take major territory quickly, and

some offensives the group has undertaken required massive amounts of manpower reflective of the type of military strategy ordinary state forces might employ. The group's frequent use of force-on-force violence has borne fruit for the organization, but has also increased the opportunities for the group's enemies to target it from the air, and has driven up IS's rate of attrition. IS's defeat at the northern Syrian city of Kobani, which is majority Kurdish, is the most glaring example of the risks that IS faces in embracing a conventional military approach. The Islamic State's push on Kobani in late 2014 allowed it to capture more than 300 surrounding villages, and enter the city center by early October.[83] But the group's repeated military pushes against Kobani with heavy armor allowed coalition airpower to inflict significant attrition on its ranks, and IS was ultimately pushed out of the city entirely. IS lost upwards of 1,200 fighters, as well as significant amounts of heavy weaponry and equipment, in its continuing efforts to capture the city.[84]

Following IS's devastating loss in Kobani, the group seemingly undertook adaptations, moving toward greater use of irregular and special forces-type warfare. The group's capture of Ramadi illustrates its evolving tactics. Over IS's three-day surge against the Anbari city, the group was able to largely evade surveillance and airstrikes—aided in part by a severe sandstorm. IS conducted multiple suicide vehicle attacks during the offensive, and IS fighters used dozens of new weapons,

> **IS uses virtually all of its advances as propaganda pieces, designed to create the perception of perpetual momentum.**

including transforming captured U.S. armored vehicles into massive improvised explosive devices. As the *Wall Street Journal* reported, American analysts believed that these developments demonstrated how

IS "appears to be learning from battlefield defeats like the one in Kobani, Syria, last summer in pursuit of its goal to control the Sunni-majority areas of Syria and Iraq."[85]

The use of conventional warfare tactics does not separate IS from al-Qaeda. As this report discusses subsequently, al-Qaeda routinely utilizes front groups and other tactics designed to obscure the responsibility for its military advances. But in contrast, IS uses virtually all of its advances as propaganda pieces, designed to create the perception of perpetual momentum. The group's powerful social media apparatus helps it to build this image, but also functions as a double-edged sword, as these electronic communications can be monitored by intelligence services. At least one U.S. air strike on an IS command post was attributed to a "moron" in IS who divulged the post's location by bragging about IS's capabilities over social media.[86] With tens of thousands of IS social media accounts, there is no way the group's mukhabarat can review all of them for operational security concerns. As a result, all kinds of valuable information routinely leak onto social media.

Inspiring Lone Wolf Attacks

There is no question that we have seen a recent spike in "lone wolf" (single actor) terrorist attacks that can be attributed primarily to the Islamic State. A recent study on lone wolf terrorism by Australian scholar Ramón Spaaij examines the phenomenon across 15 Western states.[87] Spaaij demonstrates that lone wolf terrorism had gradually increased throughout the length of his sample (from 1968-2010), but that it still represented a rare exception when it came to terrorism rather than the rule. On average, there were 4.7 lone wolf terrorist attacks per year across all 15 countries, and across all the various ideological varieties of terrorism. By the decade of the 2000s, that average had risen to 7.3 lone wolf attacks per year.

The fact that IS has driven a spike in lone wolf terrorism can be seen by the fact that IS-inspired attacks in 2014, by themselves, were greater in number than the annual average for all kinds of terrorism. The likely reason that IS has driven this spike is its mastery of social media. Terrorism has tended to be a group activity: To get someone to carry out an act as extreme as terrorism, where he may lose his life

and is likely to lose his freedom, generally requires group dynamics. The group can help reinforce the radicalizing individual's extreme ideas, spur him on to action, and refuse to let him back out. While we have grown accustomed to members of such groups being in physical proximity to each other, one's social media contacts can play the role of the radicalizing and mobilizing group. Online relationships are (generally) no less real than those that occur in the physical world, and it appears that the current spike in lone wolf terrorism has been driven by the way that extremists in IS have taken advantage of new online communication platforms.

IS often employs young foot soldiers to call for attacks in their country of origin, speaking in that state's native tongue. The purpose of using such a spokesman to call for attacks is ensuring that the audience can identify with him. For example, in December 2014, Canada native John Maguire appeared in an IS video urging his fellow Canadians to either travel to the Islamic State or carry out attacks at home. He said, "You either pack your bags, or you prepare your explosive devices. You either purchase your airline ticket, or you sharpen your knife."[88] Maguire encouraged Canadians to "follow the example" of Martin Rouleau, a Canadian who struck two military personnel in Montreal with his car in October 2014. Before the video ends, Maguire points out that he was once "a typical Canadian." He says, "I was one of you.… I grew up on the hockey rink and spent my teenage years on stage playing guitar. I had no criminal record. I was a bright student, and maintained a strong GPA in university." (In addition to hockey, Tim Horton's is another theme that features heavily in the propaganda from Canadian IS members.)

IS has explained the importance of lone wolf attacks to its audience, encouraging Muslims who cannot travel to the caliphate to carry out violence in their home countries in several issues of Dabiq. Even the group's top spokesman, Abu Muhammad al-Adnani, made an appeal in this regard in September 2014. He urged his audience to "kill a disbelieving American or European—especially the spiteful and filthy French—or an Australian, or a Canadian, or any other disbeliever from the disbelievers waging war." He said, "Do not ask for anyone's advice and do not seek

anyone's verdict. Kill the disbeliever whether he is civilian or military, for they have the same ruling. Both of them are disbelievers."[89]

One reason to prefer lone wolf attacks, Dabiq emphasized, is to reduce the chance of a plot being disrupted. "The smaller the numbers of those involved and the less the discussion beforehand, the more likely

> **IS has explained the importance of lone wolf attacks to its audience, encouraging Muslims who cannot travel to the caliphate to carry out violence in their home countries in several issues of Dabiq.**

it will be carried out without problems," IS's official English-language publication advised. "One should not complicate the attacks by involving other parties, purchasing complex materials, or communicating with weak-hearted individuals."[90]

In IS's view, the lone wolf attacks it inspires need not necessarily be spectacular. Rather, the group is more focused on inspiring frequent attacks in order to maintain the perception of momentum. IS has also stressed the importance of ensuring that an attack be attributed to the organization, warning in Dabiq that attacks that are not explicitly carried out in IS's name may be framed as "random killings" by the media.[91] Ultimately, an article published in Dabiq in late 2014 shows how IS ties various lone wolf attacks together to advance the group's narrative:

> In Australia, Numan Haider stabbed two counterterrorism police officers. In Canada, a soldier was shot and killed in front of the war

memorial in Ottawa.... All these attacks were the direct result of the Shaykh's [Baghdadi] call to action.... Sections of the media were quick to single out the attackers as "disturbed loners," individuals just looking for an excuse to commit violent crime in their hometowns. But the truth runs far deeper than this.... The significance of these attacks and others is enormous and cannot be underestimated. By calling on Muslims around the world to

> **IS has exceeded al-Qaeda's ability to inspire lone-wolf attackers, and this has furthered its goal of being seen as surpassing its parent organization.**

rise up in arms, the Shaykh launched attacks in Canada, America, and Australia (three of the countries mentioned in his speech) with nothing more than words and a shared belief in the act of worship that is jihad. A general in a conventional army couldn't possibly hope to have such power over men he'd never met on the other side of the world, ordering them to attack and possibly be killed, even if he offered them money![92]

Overall, IS has exceeded al-Qaeda's ability to inspire lone-wolf attackers, and this has furthered its goal of being seen as surpassing its parent organization. Lone wolf attacks fulfill several of IS's core objectives. The ability to inspire lone wolves helps IS to appear ascendant, demonstrates its transnational reach, and keeps the group in the media spotlight.

Al-Qaeda's Deception and Disguise

While one purpose behind IS's military actions is to showcase the group's strength to the rest of the

world, al-Qaeda has systematically sought to conceal the size of its network and downplay its capabilities across the Middle East and North Africa. The group has pursued this objective by masking its involvement in emerging theatres of conflict and establishing covert relationships with unacknowledged affiliate organizations like AST. Consequently, analysts have consistently underestimated al-Qaeda's strength while—consistent with one of al-Qaeda's key goals—counterinsurgent forces have allowed al-Qaeda front groups to thrive and build their support base. Moreover, concealing affiliates' relationships with al-Qaeda allows these groups to gain public support and attract resources from individuals and entities that might otherwise be wary of assisting an overt al-Qaeda entity.

Even as al-Qaeda took on overt regional affiliates in the years after 9/11—including AQI, AQIM, and AQAP—the group's senior leaders were weighing the merits of adopting a more covert strategy. One clear example of this comes from a letter bin Laden wrote in 2010 to the Somali militant group al-Shabaab's emir Mukhtar Abu al-Zubayr.[93] Even though Shabaab was already part of al-Qaeda's orbit at the time, this letter rejected Zubayr's request to publicly announce Shabaab's allegiance to al-Qaeda.

Bin Laden explained that establishing a formal public relationship would attract the attention of counterinsurgent forces against Shabaab. Further, bin Laden asserted that keeping Shabaab's connections to al-Qaeda concealed would allow wealthy businessmen from Saudi Arabia and Yemen to send money to Somalia without facing sanction from the international community. Channeling of aid to the Somali population through Shabaab, bin Laden explained, would help Shabaab gain popular support and "keep people with the mujahedin." Thus, bin Laden counseled Zubayr to state publicly that al-Qaeda and Shabaab's relationship was limited to a "brotherly Islamic connection and nothing more," even while he advised Zubayr to pass on "secret messaging" to the Somali people that the two groups had formally united.[94] Other al-Qaeda leaders disagreed with bin Laden's decision to conceal Shabaab's connections to al-Qaeda, and Shabaab became a publicly-acknowledged al-Qaeda branch shortly after bin Laden's death.[95] Nonetheless, this

internal disagreement does not show that there was dissension about the covertness strategy so much as it suggests there was a difference of opinion regarding which al-Qaeda branches should remain concealed and which should not.

Al-Qaeda adhered closely to its covertness strategy as the Arab Spring protests spread chaos in the Middle East in North Africa, and created new opportunities for jihadist groups. Al-Qaeda believed that if it quickly established an overt presence in places like Tunisia and Libya, it would attract pressure from counterinsurgent forces and risk alienating the population. Instead, al-Qaeda elected to use front organizations to expand its presence in revolutionary and post-revolutionary environments, concealing its footprint in order to allow its network to grow. Writers and strategists affiliated with al-Qaeda acknowledged this covertness strategy in their public writings. For example, Hamzah bin Muhammad al-Bassam wrote in February 2011:

> Generally, it is possible in our currently existing case—in the shadow of the people's revolution against ruling tyrannies—to benefit from the strategy of the constructive disarrangement and the sound assembling toward realizing the best results. The constructive disarrangement could be through various activities which are distributed in multiple directions capable of distracting the rival from the real size of the work we are doing. Then, and at the moment of decision, the sound assembling takes place, in accordance with the unity of the methodology.[96]

Bassam's mention of "constructive disarrangement" refers to the establishment of a decentralized, clandestine network that might go unannounced, and is less vulnerable to interdiction from counterinsurgent forces.[97] The strategic rationale for adhering to the covertness approach in the post-Arab Spring environment was further articulated by Abu Ubaydah al-Maqdisi, al-Qaeda's late intelligence chief. In a seminal article on strategy, entitled "Strategic Overstretch in Guerilla Warfare," Maqdisi noted that "the guerilla must be like the calm that precedes a storm; his footprints seen, but only at an appropriate

time and place, and according to an appropriate plan."[98] Such language indicates that al-Qaeda, unlike IS, places a premium on concealment. Indeed, the publication of Maqdisi's essay in al-Qaeda's English-language magazine *Resurgence* was an obvious shot at IS and its approach to revolutionary warfare.

Other jihadist authors affiliated with al-Qaeda have echoed these calls for covertness in the post-Arab Spring environment, or noted that it was being pursued. A March 2011 statement from Atiyah placed al-Qaeda's official imprimatur on the group's covert involvement in the uprising against Muammar al-Qaddafi's regime in Libya.[99] Atiyah noted that "it is not possible for the jihadist vanguards among the sons of the Islamic ummah to be at the helm of affairs in any new situation in Libya because of certain considerations such as the need for gradual change, or the need to protect a certain interest and avert a certain case of weakness." The same month, a contributor to the al-Shumukh online forum noted that al-Qaeda militants were participating in the uprising against Muammar al-Qaddafi's regime in Libya, but "all this is being done without announcing the direct involvement of al-Qaeda."[100] Recently declassified documents that were captured from bin Laden's compound in Abbottabad support the idea that al-Qaeda was covertly involved in the uprising against Qaddafi.

Al-Qaeda strategists have begun to conceive of the political system as another space to which they can expand their clandestine network. Though

al-Qaeda elected to use front organizations to expand its presence in revolutionary and post-revolutionary environments, concealing its footprint in order to allow its network to grow.

salafi jihadists consider participation in democratic institutions to be shirk (idolatry) and thus forbidden, some al-Qaeda theorists have suggested that the group should engage in politics both tactically and covertly as a means of expanding the organization's base of support and allowing it to further entrench itself in the local landscape. The famous strategist Abu Musab al-Suri explained the opportunities that existed in the political realm in his 2004 treatise Da'awa al-muqawama al-islamiyya al-'alamiyya (Call for Global Islamic Resistance), where he wrote that jihadists can "secretly use this comfortable and relaxed atmosphere [i.e., the political realm] to spread out, reorganize their ranks, and acquire broader public bases."[101]

The approach described by Suri has increasingly become part of al-Qaeda's strategy. In a revealing article written in March 2015, Abdallah bin Muhammad—a jihadist commentator who is linked to AQAP—endorsed covert jihadist engagement in politics, terming the strategy "political guerilla warfare." Bin Muhammad reasoned that jihadists should remain in the shadows when engaging in politics, allowing them to both avoid counterinsurgent detection and embed themselves within state security agencies. He pointed to some former Libyan Islamic Fighting Group (LIFG) factions' integration into the Dawn coalition in Libya as an example of the practical application of this strategy.[102]

Al-Qaeda adopted this covertness strategy in other theatres as well. Similar to the way al-Qaeda employed AST as a front group in Tunisia, it did so as well with Ansar al-Sharia in Libya (ASL).[103] Nusra operated as an unacknowledged al-Qaeda affiliate for some time before it officially pledged bayat (an oath of allegiance) to Ayman al-Zawahiri in April 2013. In fact, in a May 2013 letter believed to have been written by Zawahiri, the al-Qaeda emir scolded Nusra's emir Abu Muhammad al-Julani for "publicly showing his links to al-Qaeda without having our permission or advice."[104] This letter demonstrates that the decision to mask Nusra's ties to al-Qaeda came directly from AQSL. Similarly, the Caucasus Emirate is believed to have been covertly affiliated with al-Qaeda for years before it publicly acknowledged its relationship in 2014.

These examples demonstrate al-Qaeda's preference for covert expansion, particularly in the post-Arab

Al-Qaeda has adopted a methodical military strategy that prioritizes sustainable growth and discourages the capture of territory that cannot be held over the long term.

Spring environment. This strategy creates some vulnerabilities in the competition with IS, which seeks to portray al-Qaeda as small and declining. In these efforts, the group is aided by the fact that al-Qaeda is also trying to disguise some of its strength. However, al-Qaeda has also derived benefits from this approach, as it managed to develop an expansive clandestine network in the post-Arab Spring environment without attracting the attention of counterinsurgents.

Al-Qaeda's Cautious Military Strategy

Al-Qaeda has adopted a methodical military strategy that prioritizes sustainable growth and discourages the capture of territory that cannot be held over the long term. Though al-Qaeda has not discouraged its affiliates from holding and governing territory in the post-Arab Spring period—affiliates currently hold significant swaths of territory in Syria, Yemen, and Somalia, and governed territory in Mali from 2011 to 2013—the group has shied away from making ostentatious land grabs that it may not be able to hold.

Al-Qaeda's military approach is shaped by its patient worldview. Tactical victories that expose the network to attack and undermine al-Qaeda's long-term prospects are of little value to the organization from a strategic perspective. As such, al-Qaeda has exhorted its affiliates to take a measured approach in taking new territory, and to avoid establishing overt emirates in areas where it is vulnerable to counterinsurgent forces. Essentially, AQSL wants the network to slowly develop its capabilities and resources in preparation for a longer campaign. At the same time, al-Qaeda

instructs its affiliates to begin destabilizing state regimes. This two-pronged strategy—of gradually enhancing its capabilities and destabilizing enemy regimes—positions al-Qaeda to capitalize on state collapse and weakness in the long term.

Al-Qaeda's overarching military strategy is best articulated in former intelligence chief Abu Ubaydah al-Maqdisi's article "Strategic Overstretch in Guerilla Warfare," which was referenced previously in this report. Maqdisi emphasizes the risks of overaggressive military operations, noting that if "expansion is not accompanied by organizing the necessary force required to absorb the consequent losses in a static conventional war (as opposed to a fluid guerilla war), the results may be fatal for the Jihadi group."[105] He further identifies the challenges that militant groups encounter when confronting better-resourced state actors, remarking that "mere presence of the necessary force to merely defend a territory is not a sufficient condition for establishing complete control over the same area.... If the enemy feels that the threat posed by the expansion is existential, it will not spare any effort in destroying this threat." Maqdisi cites the Pakistani Taliban's expansion into Swat district as an example of such overstretch: The militant organization's advance into Swat Valley, a longtime tourist destination just sixty miles from the capital of Islamabad, provoked a massive counteroffensive from the Pakistani army that reversed many of the Pakistani Taliban's gains.

Keeping this cautionary tale in mind, Maqdisi presents a model for cautious and deliberate military strategy that minimizes overstretch. Maqdisi writes:

> A guerilla force may possess the capacity of inflicting huge blows on the enemy, but it may be better for it to restrain from doing so in situations when the reaction of the enemy may be overwhelming. The environment for conducting spectacular special operations is never conducive until the guerilla force has attained sufficient strength and has become invulnerable to the power of the enemy. It is only after reaching this level of strength that it is possible to direct decisive blows against the enemy. The basic principle, therefore, is to take into account the reaction of the enemy before every step in the escalation of the

conflict so that decisions appropriate only for the final stages of the war may not be made prematurely.[106]

Maqdisi's prescriptions of patience and methodical growth are echoed elsewhere in al-Qaeda's public and internal communications. The theme of patience is prevalent, for example, in Atiyah's correspondence with Abu Musab al-Zarqawi, who often defied AQSL's preferred military paradigms. In one letter to Zarqawi, Atiyah warned: "Do not rush victory over the enemy, for the war and our journey are truly long."[107]

AQAP's recent military operations in Yemen, in the midst of an intense sectarian conflict, demonstrate how al-Qaeda seeks to carry out its military strategy. AQAP has not tried to hold territory that it captured when the group did not consider those gains sustainable, and when it does control territory, it employs the kind of population-centric approach that can be seen in Mukalla. An example of AQAP choosing not to impose institutions of governance even after conquering territory can be seen in March 2015,

AQAP has not tried to hold territory that it captured when the group did not consider those gains sustainable, and when it does control territory, it employs the kind of population-centric approach that can be seen in Mukalla.

when AQAP militants overran al-Houta, the capital of Lahj Province. AQAP killed over twenty soldiers and seized a number of government buildings in the process. Hours after the militants stormed Houta, they withdrew. Though press accounts claimed that AQAP had been "driven out" of Houta,[108] the absence

of reports of militant casualties suggests that AQAP in fact undertook a tactical withdrawal. AQAP employed similar hit-and-run tactics in the town of Bayhan in Shabwa Province in February 2015, seizing an army base before withdrawing.[109] Such attacks have a destabilizing effect, and also send the signal to local stakeholders that al-Qaeda can return anytime. These locals will have a huge disincentive to cooperate with al-Qaeda's opponents, who cannot offer sufficient protection from the jihadists. At the same time, withdrawing after overrunning this territory limits AQAP's exposure to retaliation from counterinsurgent forces.

Al-Qaeda's deliberate and methodical approach extends to the group's view of the establishment of the caliphate. In contrast to IS, al-Qaeda believes that the strategic situation does not yet make the declaration of a caliphate wise. For al-Qaeda, the loss of popular support following a failed caliphate experiment would be disastrous for the jihadist movement. Wuhayshi noted to Droukdel that if al-Qaeda tried to establish a functioning caliphate and failed, "people may start to despair and believe that jihad is fruitless."[110] Another al-Qaeda official (either bin Laden or Atiyah) articulated a similar point, noting that "the impact of losing a state can be devastating, especially if that state is at its infancy. The devastation would be even harder on those who had been directly involved in the building of that state."[111]

Affiliates and Alliances

Affiliate groups and alliances are integral to both organizations' strategies. Affiliate groups, much like the franchise model in business, are a part of the overall organization and are expected to follow the senior leadership's strategy, but possess some degree of autonomy to conduct operations as they see fit. Affiliates' operations are expected to be carried out within the constraints provided by the central organization (although, particularly when the central organization's coercive power over the affiliate is limited, this is not always the case). Allies, on the other hand, are not part of the organization, but are organizations or states that share interests, objectives, or values.

Al-Qaeda and IS have different approaches to affiliates and allies. Because al-Qaeda was IS's parent

organization, it had established a robust network of affiliates, some of them covert, long before IS became a distinct organization. As such, since the competition between these jihadist groups escalated, IS has focused on trying to poach al-Qaeda affiliates, and send the signal to others in al-Qaeda's orbit that their organization was in decline, while all the momentum is on IS's side. The jihadist groups that do defect to IS are renamed as wilayats of the caliphate. And they differ with respect to allies in that al-Qaeda is willing to work with militant groups of varying ideological fervor. IS has been less ecumenical in its decisions about forming alliances. In fact, IS spokesman Abu Muhammad al-Adnani said that "the legality of all emirates, groups, states, and organizations, becomes null by the expansion of the khilāfah's authority."[112] Declaring other militant groups illegitimate obviously complicates the process of partnering with them; and IS's drive for "ideological purity" means the partners with which IS works are more limited than al-Qaeda's.[113]

IS's Challenge to al-Qaeda in Africa

IS has used two major overarching tactics in Africa to steal militant groups away from al-Qaeda. Its primary method is a "momentum strategy," which works to advertise the group's presence in the area and prove that IS has an upward trajectory. IS's second method is to inspire and publicize high-level defections from Africa-based organizations in al-Qaeda's orbit, in the hope that that other jihadist groups will follow suit. When IS has been unable to inspire these defections, it has sometimes fabricated them.

Africa is an important part of IS's designs on expansion abroad for several reasons. First, the chaotic post-Arab spring environment has allowed space for jihadist groups to operate. Both IS and al-Qaeda realize that access to ungoverned spaces in countries like Libya and Mali would allow them to train fighters, launch attacks or military campaigns from safe havens, and eventually govern these areas. Second, Africa's geographic proximity to IS's territorial holdings in Iraq and Syria, coupled with the proximity of the various militant groups in North Africa to each other, makes it a desirable location. IS addressed this in Dabiq, noting that "Algeria, Libya, and Sinai are lands strategically near each other, making it

Table 1

Official Islamic State Provinces Outside of Syria and Iraq

Province	Date IS Announced Establishment of Province	Name of Group Before it Pledged *Bayat* to IS	Date When Group Pledged *Bayat* to IS
Wilayat al-Jazair [Algeria]	November 13, 2014	Former members of Al-Qaeda in the Islamic Maghreb's Central Zone; Jund al-Khilafah	September 14, 2014
Wilayat Sinai [Sinai Peninsula]	November 13, 2014	Ansar Bayt al-Maqdis	November 10, 2014
Wilayat al-Barqa [Eastern Libya]	November 13, 2014	Islamic Youth Shura Council [Majlis Shura Shabab al-Islam]	October 3, 2014
Wilayat al-Tarabulus [Northwestern Libya]	November 13, 2014	N/A	N/A
Wilayat al-Fezzan [Southern Libya]	November 13, 2014	N/A	N/A
Wilayat al-Haramayn [Saudi Arabia][113]	November 13, 2014	N/A	N/A
Wilayat al-Yaman [Yemen][114]	November 13, 2014	N/A	N/A
Wilayat Khorasan [Afghanistan and Pakistan]	January 26, 2015	Former members of the Pakistani Taliban	October 13, 2014
Wilayat Gharb Afriqiyah [West Africa]	March 12, 2015	Boko Haram	March 7, 2015
Wilayat Qawqaz [Caucasus]	June 21, 2015	Defectors from Caucasus Emirate	June 13, 2015

Table 2

Key Groups that have Pledged Allegiance to IS[116]

Name of Group	Area of Operations	Date When Group Pledged Allegiance to IS
Ansar al-Khilafah	Philippines	August 12, 2014
Jund al-Khilafah	Tunisia	December 8, 2014, and again on March 29, 2015
Islamic Movement of Uzbekistan [IMU]	Afghanistan, Pakistan	August 6, 2015

possible to expand further despite the whims of the tawaghit."[117] Third, the fact that a large number of established jihadist groups are in Africa creates multiple opportunities for IS to attract new wilayats abroad. Showcasing IS's Africa intentions, the cover of the eighth issue of its magazine Dabiq features a photograph of the Great Mosque of Kairouan in Tunisia, with text proclaiming: "Shari'ah Alone Will Rule Africa."

IS's most significant activities in Africa have been in Egypt, where Ansar Bayt al-Maqdis (ABM) abandoned its allegiance to al-Qaeda and became IS's Wilayat Sinai; in Libya, where the group currently controls the city of Sirte; in Tunisia, where IS has significant support on the ground among jihadists; and in Nigeria, where the militant group Boko Haram pledged bayat to IS in March 2015.

IS poached the Sinai-based group ABM from al-Qaeda's orbit in November 2014. ABM's pledge of bayat to IS marked the culmination of a year-plus campaign to lure ABM into the Islamic State's orbit. The campaign dated back to August 2013, when Abu Bakr al-Baghdadi—despite the fact that IS was still part of al-Qaeda's network—set out to obtain oaths of bayat from Sinai-based jihadists, successfully luring in one militant group, al-Muhajirun wal-Ansar, with an offer of $10,000 in exchange for a pledge of allegiance.[118] Though ABM did not pledge bayat to IS

at the time, signs soon emerged that some support for IS existed within ABM. In January 2014, Abu Usamah al-Masri issued a statement just before IS's expulsion from al-Qaeda that concluded with specific encouragement of IS, saying the organization should "show firmness" and "be patient." In late March 2014, nine figures associated with al-Qaeda in Afghanistan, including Abu al-Huda al-Sudani, publicly declared their allegiance to IS in an Arabic-language statement. The document concluded by noting other jihadist organizations to whom copies of the statement were sent, and listed ABM among those factions.

Ties between the two organizations continued to grow. The first indication of operational coordination between ABM and IS emerged in the summer of 2014, when Egyptian security forces began arresting IS members traveling to Egypt through underground tunnels between Rafah and the Gaza Strip, with the likely intention of supporting ABM.[119] In September 2014, the Kuwaiti newspaper Al-Shahid reported that IS had dispatched a jihadist known as Musa'id Abu Qatmah to the Sinai Peninsula through Gaza—and that, once in Sinai, he set about trying to win oaths of loyalty from local militant groups.[120] Abu Qatmah was not the only IS figure attempting to win over Sinai groups during that period. When Egyptian authorities arrested eleven alleged militants in early September, they found that the men carried three letters from a Libya-based IS figure known as Abu Ahmad Al-Libi; he

encouraged Sinai-based jihadist groups to unite under a single banner of IS supervision in exchange for IS providing all the funding and arms that they required.

The relationship between the two groups was cemented in October 2014, when two envoys from ABM traveled to Syria, where they met with IS leaders and discussed pledging bayat to IS in exchange for weapons and funding.[121] At around the same time that the envoys traveled to Syria, ABM carried out an attack against the Karm al-Qawadis checkpoint on October 24, and, according to Egyptian authorities, the arrested suspects said that IS ordered ABM to execute the attacks with funding, weapons and explosives that the group had received from Palestinian jihadist groups. Just weeks after the attack, ABM officially pledged allegiance to IS.

It wasn't just IS's entreaties that cemented ABM's pledge. Even as IS plied ABM with money and weapons, ABM lost a number high-level leaders during the course of 2014—losses that were particularly significant because ABM's total size in the Sinai is estimated at no more than around 200 full-time members.[122] Two key ABM leaders—founder Tawfiq Mohammad Faraj and Muhammad al-Sayyid Mansur al-Tukhi—died on the same day in March 2014. Other key ABM leaders were also lost to the Egyptian security services during the course of the year. These deaths were a major catalyst behind IS sending its representative Musa'id Abu Qatmah to the Sinai, to exploit this rapid attrition. The group's new leader Shehta al-Ma'atqa was then killed by Egyptian authorities in early October 2014, with around twenty other ABM members also killed in a one-week (October 3–9) Egyptian offensive.[123] Shortly thereafter, Egyptian security forces captured ABM's military emir Walid Atallah, further eroding the bench of personnel who would have maintained loyalty to al-Qaeda. Thus, IS skillfully wooed Ansar Bayt al-Maqdis, but its efforts were also helped by attrition within the group's ranks.

In Libya, IS has established a solid foothold, and the group has heavily broadcast its expansion efforts into the country. In the eighth edition of Dabiq, IS advertised Libya as a place to go "for those who find difficulty making their ways to Sham, particularly those of our brothers and sisters in Africa."[124]

While IS has an impressive network in Libya, the group has also used smoke and mirrors to create the perception of strength during its advance. In October 2014, IS released videos and pictures via social media of IS militants parading through the streets of the eastern Libyan city of Derna, waving IS's black flags. This propaganda campaign convinced onlookers—including such major media outlets as BBC and CNN—that IS had seized control of Derna.[125] In reality, IS only controlled a portion of Derna. The fragility of
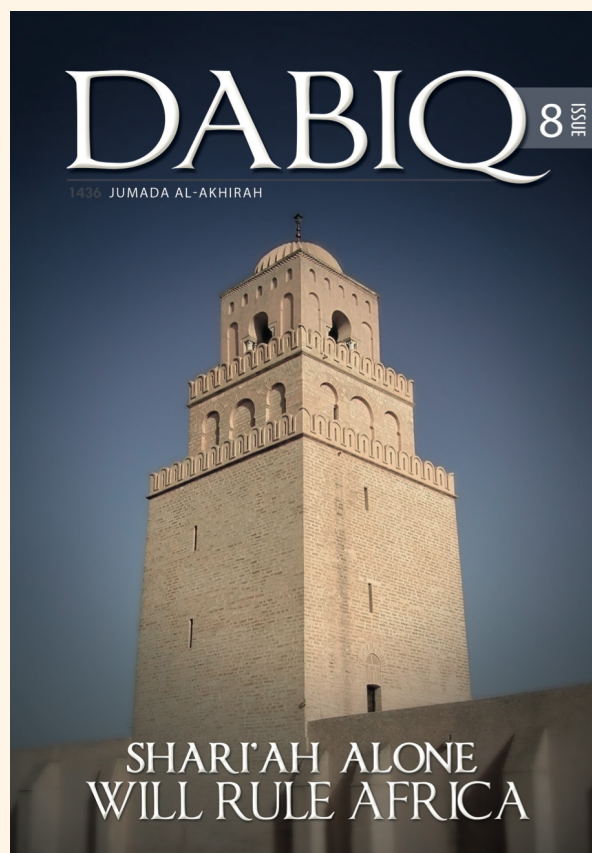
The cover of the eighth issue for Dabiq is a powerful symbol of the Islamic State's intentions for Africa.

IS's foothold in Derna became apparent in June 2015, when the Derna Mujahedin Shura Council, which was comprised of several militias, drove IS out of the city entirely. Since being forced out of Derna, IS's center of gravity in Libya has shifted to the city of Sirte, Muammar Qaddafi's hometown. IS has had a presence in Sirte dating back to June 2013, when Turki al-Binali, one of IS's top religious clerics, traveled to the city to give a series of lectures and to recruit residents.[126] IS

was able to tap into these networks when it focused its efforts on Sirte—and as of this writing, it is in control of the city.

IS's expansion in Libya—both real and fabricated—has had ripple effects that extend to Nigeria. At the time of IS's expansion into Sirte, Boko Haram was on the

> **IS has exceeded al-Qaeda's ability to inspire lone-wolf attackers, and this has furthered its goal of being seen as surpassing its parent organization.**

verge of pledging bayat following IS's months-long courtship. IS's widely-reported capture of Libyan cities—at the time, media claimed that the group controlled both Derna and Sirte—demonstrated the Islamic State's capabilities in Africa, and no doubt helped to remedy Boko Haram's unease about leaving al-Qaeda's orbit for IS. On March 7, Boko Haram publicly pledged bayat to IS in an audio recording.

Tunisia, which has had more foreign fighters travel to Syria than any other country, also appears to be a battleground in the struggle between IS and al-Qaeda in Africa.[127] While the jihadist groups that emerged in the immediate wake of the Arab Spring—AST and Katibat Uqba ibn Nafi (KUIN)—have leadership loyal to al-Qaeda, the majority of Tunisians who went to Syria as foreign fighters were aligned with IS in that theater.

IS's momentum-based strategy has been at play in Tunisia. Following the March 18, 2015 attack on the Bardo National Museum in Tunis—which killed twenty-one people—IS quickly claimed credit for the attack. However, Tunisia's later investigation instead attributed the terrorist incident to KUIN, and identified the group's emir Luqman Abu Saqr as the mastermind. If IS did indeed exaggerate its role in the

Bardo attack, as it appears, its strategy in doing so is clear. After all, the Bardo attack occurred amidst a series of IS advances in various countries, including a Libyan IS affiliate's offensive into Sirte in February and Boko Haram's pledge of bayat to IS on March 7. The Islamic State's claim of the Bardo attack furthered the perception that the group had significant momentum internationally.

The Bardo attack, because it was carried out by a rival, threatened IS's narrative of momentum. But IS knew from past experience that al-Qaeda generally doesn't claim credit for attacks while the operatives who carried them out are still at large. IS thus may have realized that it could issue a claim of responsibility before al-Qaeda was prepared to do so. Given the way media cycles work—and IS is very attuned to the media cycle—a false or exaggerated claim of responsibility would dominate the news before anybody could disprove it, at a time when Bardo remained a top headline. Al-Qaeda's greater role wouldn't become known until the attack was no longer a hot news item. And IS appears to have been correct in its calculations about media coverage of the Bardo attack.

The Islamic State in Yemen

IS has trumpeted its expansion into Yemen. As previously noted, the group's claims to be a powerful force in Yemen appear to be driven less by its actual possession of a strong on-the-ground presence than by its competition with al-Qaeda. AQAP is al-Qaeda's most important branch, as illustrated by the fact that the group's late emir Nasir al-Wuhayshi (d. June 12, 2015) had also been named the overall al-Qaeda organization's general manager. Additionally, IS, as a former al-Qaeda affiliate, is well aware that AQAP is responsible for guiding al-Qaeda's Africa network. If IS were able to mount a significant challenge to AQAP, or at least chip away at the group's dominance in Yemen, it would be a major blow to al-Qaeda. Indeed, even if IS proves unable to build a competitive network to challenge AQAP, if its propaganda fosters the perception that it has done so, IS could further paint al-Qaeda as a sinking ship whose affiliates should run for a life raft as soon as possible.

IS's attempts to move into Yemen come against a backdrop of civil conflict and growing chaos in the country. In 2014, tensions intensified between the

regime of Yemeni president Abd Rabbuh Mansur Hadi and the Houthis, a movement based in northern Yemen that follows the Zaidi school of Shia Islam. In September 2014, Houthi militants moved into the capital of Sana'a, heightening concerns about a broader national conflagration. Those concerns were realized in February 2015, when the Houthis—who are backed by forces loyal to deposed president Ali Abdullah Saleh—dissolved the parliament and raided the presidential palace, placing Hadi under house arrest. (Hadi escaped Sana'a, and fled to Saudi Arabia in March 2015.) As the Houthis, backed by Iran, pushed toward the last major pro-Hadi bastion in the coastal city of Aden, Saudi Arabia and a coalition of Sunni states launched a military offensive aimed at driving back the Houthis and restoring Hadi's government.

The Saudi-led coalition's intervention added a regional dimension to the conflict in Yemen. The Saudis and their Sunni partners on the ground view

The cover of the eighth issue for Dabiq is a powerful symbol of the Islamic State's intentions for Africa.

the Houthi advance as part of a broader trend of Iranian encroachment. The Saudi-led coalition has initiated a campaign of air strikes against the Houthis, and has deployed ground forces in recent weeks to retake Houthi-controlled territory in southern Yemen. The Saudi intervention has intensified the sectarian elements of this civil conflict.

IS has tried to exploit the sectarian conflict to gain popularity among Yemeni Sunnis and undercut

AQAP's position. IS presents itself as the protector of Sunnis and has launched a campaign of suicide attacks against Houthi mosques. At the same time, IS criticizes al-Qaeda for its failure to similarly target the Houthis' houses of worship and, more generally, for taking a softer stance towards Houthi civilians. IS has also attacked AQAP for avoiding attacks against the "apostate government, army, police, and intelligence forces."[128] (In return for this concession, AQAP has been able to participate in the capture of Aden and amass considerable resources from an increasingly desperate GCC.)

IS announced its arrival in Yemen in typically spectacular fashion in March 2015, when suicide bombers carried out attacks on two mosques frequented by Houthis in Sana'a, killing 137.[129] The attack was controversial among Sunnis because Sunni Muslims also frequented both mosques: IS had killed Sunnis in addition to Houthis. The group followed this attack with a barrage of propaganda aimed at highlighting its expansion into Yemen. On April 24, 2015, IS released a nine-minute propaganda video entitled "Soldiers of the Caliphate Land in Yemen." The video opens with a lone IS member planting the group's flag into desert sand near Sana'a. He is joined by some twenty additional IS fighters wearing matching camouflage uniforms. The militants are shown in training exercises, after which they threaten attacks on Houthis. The video was clearly designed to trumpet IS's presence and to present disillusioned AQAP members with an alternative group to join.

Exactly one week after IS released this video announcing its presence in Yemen, the group released another video, "Eliminating the Apostates," which showed the execution of fifteen Yemeni soldiers. In May 2015, IS released another video in which IS fighters based in Syria advised Yemeni Sunnis to have "patience," while urging those who have not yet joined IS to "join the convoy," which they portrayed as "still moving forth." A day after the video was released, IS claimed credit for an attack on a Houthi military barracks in Shabwa province.[130]

Despite IS's propaganda campaign, its limited success should be made clear. Outside of Sana'a, its attacks have been overwhelmed in terms of number, target, and impact by AQAP and Ansar al-Sharia in Yemen.

Further, IS has experienced extremely limited success in inspiring high-level defections from AQAP. IS was able to poach Mamun al-Hatim from AQAP, though he was killed in a drone strike in al-Mukalla in May 2015.[131] Other than Hatim, IS has failed to attract AQAP's senior leaders, several of whom have strongly denounced IS.[132]

Still, IS will likely continue to target AQAP—both its leadership cadre and lower echelons—in an effort to chip away at the al-Qaeda affiliate's strength. IS may also highlight low-level defections as evidence of AQAP's internal disunity, casting AQAP as a crumbling organization. Nonetheless, IS faces a tall order in trying to challenge AQAP, one of al-Qaeda's strongest affiliates, which has been on an upward trajectory since the outbreak of civil war.

Al-Qaeda's Cooperation with Other Militant Organizations

In the post-Arab Spring environment, al-Qaeda has employed a collaborative approach toward other armed groups, including those who do not share its salafi jihadist outlook. There are several strategic benefits that al-Qaeda derives from its collaboration. For one, this approach bolsters al-Qaeda affiliates' military capabilities and allows al-Qaeda to embed itself within local groups, making it difficult for counterinsurgent forces to target al-Qaeda separate from its partners. Additionally, collaboration with other armed groups provides al-Qaeda the opportunity to expand its support base by appealing to Islamist rebels.

Al-Qaeda strategists have long exhorted affiliates to engage with non-salafi jihadist organizations and to avoid confrontations with other Islamist groups that would detract from al-Qaeda's objectives. As early as 2003, bin Laden called for jihadists to collaborate with Baathist insurgents against the U.S. coalition in Iraq—despite al-Qaeda's "belief in the infidelity of the socialists"—likening the Baathist-jihadist relationship to the collaborative relationship between Persians and Arabs in the seventh and eighth century.[133] In another statement pertaining to Iraq, Zawahiri gave pointed instructions to jihadists not to be "restrained by the shackles of organizations and foundations from entering the fields of battle," and to "free ourselves from [these] shackles" if they interfered with the pursuit of jihadist goals.[134] Atiyah issued a directive to Zarqawi in 2005 instructing AQI's emir to cooperate with all Sunni insurgent organizations, even those that were "disobedient or insolent."[135]

Al-Qaeda's collaborative approach has yielded benefits in the conflict-prone post-Arab Spring environment. Jabhat al-Nusra's participation in the Jaysh al-Fatah rebel coalition is a prime example of how al-Qaeda's strategy has been carried out. In March 2015, several of Syria's most powerful rebel groups, including Ahrar al-Sham, Faylaq al-Sham and Jund al-Aqsa, joined with Nusra to form Jaysh al-Fatah, which was established to allow the rebels to coordinate their offensive on the city of Idlib. Within a matter of weeks, the rebel coalition had made significant gains, taking the cities of Idlib and Jisr al-Shughour. The coalition is now in control of the majority of Idlib province—including Ariha, Harem, and Marrat al-Nu'man—and is well positioned to continue advancing.

Nusra's involvement in Jaysh al-Fatah confers several advantages. The fact that the group is so embedded within the rebel landscape—when the United States is still committed to ensuring that Assad's regime falls—makes it nearly impossible for the United States to target Nusra without sparking the ire of other rebel groups, and angering Syrians who view Nusra as an integral part of the anti-Assad coalition. But even before the establishment of Jaysh al-Fatah, Nusra's strategy of establishing lasting relationships with other militant groups complicated U.S. efforts to combat Nusra's network. In November 2014, when the United States targeted the external operations wing of the Khorasan Group, which was embedded with Nusra, other rebel factions, including some moderate groups, decried the airstrikes.[136] Nusra's role in Jaysh

al-Fateh makes targeting the group even more difficult.

Another advantage is that Nusra is now in a strong position to benefit from the material support that Sunni Arab states provide to the Syrian opposition. Saudi Arabia, Turkey and Qatar have all supported Jaysh al-Fatah.[137] These regimes' support for Jaysh al-Fatah makes Nusra a beneficiary of overt state sponsorship. Moreover, Nusra's involvement in Jaysh al-Fatah allows it to spread its methodology and ideology among the Syrian rebels and population.

Nusra emir Abu Muhammad al-Julani's statement after the capture of Idlib city reveals Nusra's careful strategy to expand its influence in territory that Jaysh al-Fatah overruns. Julani called for the establishment of sharia, enforced by sharia courts, as well as for the provision of services to the public. Yet Julani also noted that Nusra was "not looking to rule the city ... alone without others," thereby assuaging the concerns of other rebel groups that Nusra would dominate the governance of Idlib.[138] Recently a spokesman for Ahrar al-Sham said of Nusra's role in Idlib: "Nusra is like any of the other factions.... It hasn't differentiated itself. Every faction has a role and has a vote, but the general decision is taken by consensus."[139]

Al-Qaeda's pragmatism has also shaped the group's approach toward the Islamist political parties that initially dominated the political space in post-revolutionary countries like Egypt, Tunisia, and Libya. Al-Qaeda's policy toward Islamists was outlined in Zawahiri's General Guidelines for Jihad, which instructed affiliates to avoid becoming consumed by ideological disagreements with Islamists, and advised affiliates to respond to Islamist-initiated hostilities with only a "minimal response that would be sufficient to stop its aggression, so as to close the door of strife amongst Muslims."[140] Though al-Qaeda disagrees with political Islamists' methodology, its strategists reasoned that confronting political Islamists would distract from al-Qaeda's primary targets, "enemies of Islam and those who hold animosity towards Islam" according to Zawahiri's guidelines. Al-Qaeda also calculated that adopting a less confrontational approach toward political Islamist parties could provide the jihadist movement opportunities for growth. Al-Qaeda's strategists accurately assessed that Islamist political parties would be hesitant, at least initially, to crack down on salafi jihadists' dawa efforts—and perhaps on their use of hisba violence as well.

Thus, Al Qaeda assessed that it could capitalize upon this permissive environment by expanding its dawa efforts while avoiding confrontation with Islamist regimes. Atiyah clearly articulated this strategy in a statement issued in the early months of the Arab Spring, in which he instructed jihadists to "embark upon a constructive preparatory work" in Tunisia and Egypt, rather than becoming "engaged in conflicts with ... various groups in the Islamic movements."[141] As noted earlier in this report, Ansar al-Sharia in Tunisia closely adhered to this strategy in the early stages of the post-Arab Spring period.

CONCLUSION

The competition between IS and al-Qaeda continues to evolve rapidly. For one recent example, the crash of Metrojet Flight 9268 in the Sinai Peninsula on October 31, 2015, may prove to be an inflection point in this competition. Some U.S. intelligence officials have expressed certainty that a bomb brought down the plane, which was flying from the southern Sinai resort town of Sharm el-Sheikh to St. Petersburg.[142] Though authorities have not definitively determined who was responsible, IS's Wilayat Sinai claimed responsibility for the attack in a cryptic statement in English issued just hours after the plane crashed,[143] and was able to show video of the plane's explosion shot from two different angles. British and U.S. intelligence agencies intercepted communications about the plane crash that reportedly further establish IS's responsibility.[144]

The Sinai attack, and the Paris attack that followed less than two weeks later, give somewhat of an immediate boost to IS's prospects in its competition with al-Qaeda. IS had never previously carried out a mass casualty attack against the "far enemy" (including not just the U.S. and the West, but also

Russia) until the Sinai attack. The fact that IS targeted a plane could also appear to be a direct affront to al-Qaeda, which has focused numerous operations against planes. AQAP, which took the lead in plotting attacks on commercial aviation, has had several near-misses in its recent efforts. On Christmas Day 2009, Umar Farouk Abdulmutallab, the Nigerian operative AQAP tasked with blowing up a plane flying over the U.S., failed to detonate the explosives in his underwear. The following year, AQAP placed bombs disguised as printer cartridges onto two airplanes, but the plot was disrupted before the bombs were set to explode. Wilayat Sinai's successful attack against the Russian airliner may suggest to some jihadist observers that IS has beaten AQAP at its own game. The recent attack in Paris only adds to that narrative, creating the perception that IS has firmly supplanted al-Qaeda in its ability to strike the West.

The Sinai attack also sheds light on IS's capabilities in Sinai, and the tenuous security environment in Egypt. The attack may have been the work of an "inside man," an airport employee loyal to IS.[145] It would not be the first time jihadists infiltrated an airport in Egypt. In May 2014, Egyptian security officials arrested three individuals who worked at the Cairo International Airport on suspicions that they were connected to Ansar Bayt al-Maqdis (ABM), Wilayat Sinai's predecessor organization. According to regional press reports, one of the men arrested had been in contact with ABM militants, and had discussed bringing weapons and explosives into the airport to carry out attacks against foreign travelers.[146]

The Sinai attack is just one development in a competition where IS's rise has fundamentally reshaped the global jihadist landscape, which for nearly two decades was dominated by al-Qaeda. With IS seizing the world's attention, the age of unipolarity in the jihadist movement is over. Of all the actors now witnessing IS's dramatic rise, no actor has more to lose than al-Qaeda. IS's efforts to poach militants from al-Qaeda-aligned groups, and even to entice entire organizations to defect from al-Qaeda into IS's orbit, pose a challenge to al-Qaeda's network. Meanwhile, IS's Focoist strategy threatens to undermine al-Qaeda's carefully calibrated Maoist strategy if it forces al-Qaeda to compete in a game of outbidding, thus undermining its population-centric approach.

Al-Qaeda could take two potential approaches to IS's challenge. One approach would be to essentially abandon its Maoist strategy and become more overt than it has been in recent years. In an effort to show that it has not become obsolete or brittle, al-Qaeda could ask its unacknowledged affiliates and front organizations to reveal their true allegiances, and could conduct the kind of shows of military force that have made IS so prominent. In essence, al-Qaeda could respond to the IS challenge by becoming more like IS. Should this occur, we would likely witness a period of violent outbidding in which both al-Qaeda and IS escalate attacks on high-profile targets and on each other.[147]

Al-Qaeda is unlikely to make this strategic about-face, though there are a few possibilities that could result in its hand being forced. These possibilities all relate to al-Qaeda's network being fundamentally threatened—if, for example, there appears to be a significant chance that al-Qaeda could lose one of its major affiliates to IS. Such threats to the network could emerge if al-Qaeda's communication throughout its own network breaks down, such that affiliates lose sight of its long-term strategy and begin to interpret al-Qaeda's patient approach in the same way IS's propaganda does: as lack of action and success. A second way al-Qaeda's network could be threatened by IS is if its affiliates experience significant attrition at the leadership level, similar to the losses ABM absorbed prior to its defection to the Islamic State. The replacement of al-Qaeda loyalists with those who are more pro-IS, or simply more impetuous in strategic outlook, could force al-Qaeda's hand. Also, if IS experiences a spectacular success, such as executing a catastrophic terrorist attack against the continental United States, that could push al-Qaeda away from its Maoist approach and toward greater overall overtness.

But absent such fundamental threats to al-Qaeda's network, it is unlikely to abandon its current approach and turn toward a more overt strategy. Al-Qaeda has dedicated years to developing its clandestine networks, and to making itself a more organic part of the population in areas where it operates. If al-Qaeda makes its affiliates more visible, that would also make them more vulnerable to targeting by counterinsurgents. Further, if al-Qaeda adopted IS-like overt brutality and shows of force, it could risk losing

the public support it has worked to cultivate in various theaters in recent years.

If al-Qaeda's network isn't fundamentally threatened, it is possible that rather than embracing IS's tactics, al-Qaeda instead doubles down on its low-profile, Maoist-style strategy in order to exploit its adversaries' willingness to view it as a spent force. Al-Qaeda could further de-emphasize its brand, pushing affiliates that lack a known al-Qaeda affiliation to the fore and getting others to shed the al-Qaeda label. Reports that emerged earlier this year that Nusra was considering leaving al-Qaeda may have been the network considering doing just this.[148] In short, under this approach al-Qaeda would grow quieter even as IS gets louder. The advantage al-Qaeda might perceive in going this direction is furthering the process of its rebranding, and continuing to reduce its profile to counterinsurgents—but there are obvious risks, as such attempts at deception could produce an actual fragmenting of its network.

At any rate, al-Qaeda currently is in the midst of a rebranding campaign that was first conceived following AQI's failed campaign in Iraq. Al-Qaeda has pursued this rebranding strategy even in the face of IS's growing threat to its network. The group's rebranding strategy has actually benefitted from IS's penchant for brutality. IS has dramatically shifted the jihadist Overton window (the range of ideas viewed as acceptable to the public), thus making al-Qaeda appear to be a lesser evil to some Sunni states. Indeed, al-Qaeda has even presented itself as a partner to some Sunni states in the fight against IS. Abu Muhammad al-Maqdisi, one of al-Qaeda's most well-known ideologues, has been publicly condemning IS ever since his recent release from Jordanian prison. Maqdisi in fact played a central role in the failed attempt to persuade IS to release Jordanian pilot Moaz al-Kasasbeh, whose plane had crashed in IS-controlled territory. (The jihadist group ultimately burned Kasasbeh alive.) The Jordanian government is not naïve about al-Qaeda, but may believe it can utilize IS critics like Maqdisi and fellow al-Qaeda ideologue Abu Qatada to weaken IS's influence in Jordan.

The Middle East's growing competition between Iran and the region's Sunni states, which is currently playing out on the battlefields of Syria and Yemen, has further improved al-Qaeda's position in many ways. Sunni states immersed in the struggle against Iran and its proxies may view al-Qaeda as a potential, albeit temporary, partner. This appears to have happened already to some extent in both Syria and Yemen.

Of course, al-Qaeda's current strategy carries risks for the organization. Al-Qaeda could lose the support of the jihadist community if it is widely perceived as weak, and AQSL could ultimately find itself with only a shell of its old network. But al-Qaeda may be willing to accept these risks because it assesses that the challenge posed by IS will recede sooner rather than later. IS has largely hinged its reputation on its ability to establish and expand the caliphate, and if IS loses significant territory in Iraq-Syria, pro-IS jihadists may begin to question whether its caliphate is truly sustainable, and whether its strategic choices were wise. Al-Qaeda has clearly outlined its view that IS is in a position of strategic overreach.

For its part, IS appears unlikely to want to modify its Focoist strategy in the short term—and in the longer term, it will have difficulty changing its reputation even if the group eventually wants to do so. IS is deeply wedded, to its current approach. In order to chip away at al-Qaeda's global network, IS believes that it must continue to broadcast its successes and carry out dramatic shows of force that create the perception of perpetual momentum.

The transnational jihadist movement is likely to be defined and shaped in the coming years by the competition between al-Qaeda and IS. Though it appears likely that both al-Qaeda and IS will adhere to their current strategies, unforeseen changes in the political environment in the Middle East and beyond could prompt both groups to modify their methodology. It is essential that the United States understand the two groups' strategies, and pay close attention as their approaches continue to evolve. In the current operating environment, the United States has tremendous opportunities to exploit the cleavages between IS and al-Qaeda. However, if we fail to understand the two organizations' strengths, weaknesses, and strategic and tactical postures, the jihadist movement may emerge from this period of competition stronger than before.

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