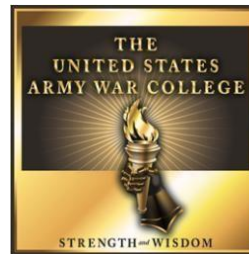


Understanding the Islamic State: The Key to Effective Strategic Planning

by

Lieutenant Colonel (P) David R. Hibner
United States Army

Under the Direction of:
Professor Robert S. Hume



United States Army War College
Class of 2016

DISTRIBUTION STATEMENT: A

Approved for Public Release
Distribution is Unlimited

The views expressed herein are those of the author(s) and do not necessarily reflect the official policy or position of the Department of the Army, Department of Defense, or the U.S. Government. The U.S. Army War College is accredited by the Commission on Higher Education of the Middle States Association of Colleges and Schools, an institutional accrediting agency recognized by the U.S. Secretary of Education and the Council for Higher Education Accreditation.

REPORT DOCUMENTATION PAGE			Form Approved--OMB No. 0704-0188		
The public reporting burden for this collection of information is estimated to average 1 hour per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to Department of Defense, Washington Headquarters Services, Directorate for Information Operations and Reports (0704-0188), 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302. Respondents should be aware that notwithstanding any other provision of law, no person shall be subject to any penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number. PLEASE DO NOT RETURN YOUR FORM TO THE ABOVE ADDRESS.					
1. REPORT DATE (DD-MM-YYYY) 01-04-2016		2. REPORT TYPE STRATEGY RESEARCH PROJECT		3. DATES COVERED (From - To)	
4. TITLE AND SUBTITLE Understanding the Islamic State: The Key to Effective Strategic Planning			5a. CONTRACT NUMBER		
			5b. GRANT NUMBER		
			5c. PROGRAM ELEMENT NUMBER		
6. AUTHOR(S) Lieutenant Colonel (P) David R. Hibner United States Army			5d. PROJECT NUMBER		
			5e. TASK NUMBER		
			5f. WORK UNIT NUMBER		
7. PERFORMING ORGANIZATION NAME(S) AND ADDRESS(ES) Professor Robert S. Hume			8. PERFORMING ORGANIZATION REPORT NUMBER		
9. SPONSORING/MONITORING AGENCY NAME(S) AND ADDRESS(ES) U.S. Army War College, 122 Forbes Avenue, Carlisle, PA 17013			10. SPONSOR/MONITOR'S ACRONYM(S)		
			11. SPONSOR/MONITOR'S REPORT NUMBER(S)		
12. DISTRIBUTION / AVAILABILITY STATEMENT Distribution A: Approved for Public Release. Distribution is Unlimited. Please consider submitting to DTIC for worldwide availability? YES: <input checked="" type="checkbox"/> or NO: <input type="checkbox"/> (student check one) Project Adviser recommends DTIC submission? YES: <input checked="" type="checkbox"/> or NO: <input type="checkbox"/> (PA check one)					
13. SUPPLEMENTARY NOTES Word Count: 12,665					
14. ABSTRACT The United States and other nations have struggled to find a widely accepted strategy to defeat the Islamic State because they oversimplify understanding the operational environment by focusing on what can be seen by an outsider as a reflection of their own biases and experiences. The resulting lack of understanding of the deeper culturally and religiously oriented values and assumptions that provide the strength and purpose to ISIS and its corresponding strategic objectives is perpetuated throughout the strategic planning process. In order to develop effective strategies and policies to solve these problems, the Islamic State's culture, objectives, and strategy must be clearly understood from the perspective of those doing the fighting. By analyzing and understanding Islamic State operations from the deeper aspects of values and underlying assumptions of the organization, strategists and policy makers will have a better understanding of the unique strategic implications of the Islamic State, which is a necessary foundation for defining and following an effective, widely accepted strategy to contain or defeat them.					
15. SUBJECT TERMS ISIS, ISIL, Daesh					
16. SECURITY CLASSIFICATION OF:			17. LIMITATION OF ABSTRACT	18. NUMBER OF PAGES 54	19a. NAME OF RESPONSIBLE PERSON
a. REPORT UU	b. ABSTRACT UU	c. THIS PAGE UU			19b. TELEPHONE NUMBER (w/ area code)

Understanding the Islamic State: The Key to Effective Strategic Planning

(12,665 words)

Abstract

The United States and other nations have struggled to find a widely accepted strategy to defeat the Islamic State because they oversimplify understanding the operational environment by focusing on what can be seen by an outsider as a reflection of their own biases and experiences. The resulting lack of understanding of the deeper culturally and religiously oriented values and assumptions that provide the strength and purpose to ISIS and its corresponding strategic objectives is perpetuated throughout the strategic planning process. In order to develop effective strategies and policies to solve these problems, the Islamic State's culture, objectives, and strategy must be clearly understood from the perspective of those doing the fighting. By analyzing and understanding Islamic State operations from the deeper aspects of values and underlying assumptions of the organization, strategists and policy makers will have a better understanding of the unique strategic implications of the Islamic State, which is a necessary foundation for defining and following an effective, widely accepted strategy to contain or defeat them.

Understanding the Islamic State: The Key to Effective Strategic Planning

Given one hour to save the planet, I would spend 59 minutes understanding the problem and one minute resolving it.

—Albert Einstein¹

In June 2014, the world watched with shock and bewilderment as approximately 1,500 fighters from the Islamic State in Iraq (ISIS) and as-Shams conquered Mosul, the second largest city in Iraq, despite being outnumbered by the Iraqis defending the city 15 to one.² Since its rise and military successes in Syria and Iraq in 2014, ISIS has been on a reign of terror in the region and controls an area that would cover the distance from Washington D.C. to Cleveland, Ohio.³ Public beheadings, stonings, amputations, and beatings have become commonplace, and the bodies of executed and crucified victims often stay on public display for three days or more.⁴

Prior to the success of the Islamic State in Iraq, the international community underestimated the threat the Islamic State posed to the region.⁵ In January 2014, President Obama displayed an early under appreciation for the capabilities of the Islamic State by comparing ISIS to a Junior Varsity basketball team.⁶ Others have overestimated ISIS' capabilities, including Senator Bill Nelson, who said the Islamic State's desire to fly a black flag over the White House should be considered clear and present danger, and Senator Jim Inhofe who suggested the Islamic State is rapidly developing the capability to blow up a U.S. city.⁷ Understanding the potential threat of state and non-state actors is a security imperative of the United States and the International Community. In the case of the Islamic State, it appears that most of the indicators, warnings, capabilities, and intentions were either missed entirely or misunderstood. This misperception or misunderstanding provided ISIS an opportunity to

gain and consolidate power from 2010 until 2014 when its threat and capabilities exploded in an undeniable form. By then, the opportunity to prevent ISIS from rising was gone; it was time to develop a strategy to contain or defeat them.

In order to develop an effective strategy for containing, or defeating ISIS, the United States and its allies must have a more thorough understanding of the operating environment of the Islamic State. While this analysis could go into great depth and include important factors such as Russia's involvement and the long-term intentions of Iran, the primary focus is on the Islamic State as an organization and, more specifically, the deeper values and underlying assumptions that provide the basis for its strategy and ideology. The goal of this paper is to achieve a better understanding of the Islamic State for strategy formulation by reviewing the joint planning process, providing background of the Islamic State, describing the Islamic State's operational environment, and analyzing the Islamic State as an organization. With a better understanding of the operational environment of the Islamic State, this methodology concludes by offering strategic implications and recommendations for developing a more effective strategy to contain or defeat ISIS.

The Joint Planning Process

United States joint doctrine for intelligence, Joint Publication 2-01, emphasizes the importance of understanding an adversary and articulates that the ability to think like the enemy is dependent on "a detailed understanding of the adversary's goals, motivations, objectives, strategy, intentions, capabilities, methods of operation, vulnerabilities, and sense of value and loss."⁸ Since the sudden appearance of the Islamic State on the world stage in 2014, and its stunning military successes in Syria

and Iraq, strategists and policy makers have struggled with this bedrock principle of strategic planning.

United States joint force commanders and staff develop plans and orders by combining operational art, operational design, and the Joint Operations Planning Process (JOPP). Operational art is the application of creative thought supported by experience and knowledge to link ends, ways, and means. Operational design is a process of iterative understanding and problem framing to develop viable approaches to operations and campaigns. The JOPP uses operational art and design together as the launching point to detailed planning in order to turn concepts into executable plans.⁹ Getting any part partially or completely wrong in this process could result in plans that cannot achieve, or cannot fully achieve, the desired objectives, and end state. While no plan will ever be perfect, it appears the lack of understanding regarding the Islamic State's social, religious, and cultural aspects lies in the operational design part of the joint planning process.

Operational design is critical for initial and ongoing planning efforts to understand the situation and to define the problem and helps to conceive broad solutions, known as an operational approach, for mission accomplishment and reducing uncertainty in complex environments.¹⁰ According to Joint Publication 5-0, *Joint Operational Planning*, "The operational approach is based largely on an understanding of the operational environment and the problem facing the Joint Force Commander."¹¹ Put another way, not understanding the operational environment will result in a flawed problem definition and strategy.

The three elements of operational design are understanding the operational environment, defining the problem, and developing the operational approach. Each step is dependent on the previous step. To define the problem properly, strategic planners must understand the operational environment. To develop the operational approach effectively, strategic planners must accurately define the problem. To produce a plan that has the best chance of success, strategic planners must effectively develop the operational approach. The effects of error in a process that is linear and dependent on successive steps is multiplicative. If the probability of understanding the operational environment is .90, and the probability of accurately defining the problem is .90, the probability of getting both right is $.90 \times .90$, or 81 percent. If the probabilities of effectively developing an operational approach and producing a plan with the best chance of success are also .90 each, then the overall probability of an effective strategy is $.81 \times .90 \times .90$, or .66 percent. While this is an overly simplistic method of calculating the probability of a successful strategy, it does emphasize the importance of maximizing the effectiveness of each step in the strategic planning process--starting with understanding the operational environment.

One could rightfully question why it has been so hard to describe, with an astute and deep understanding, the operating environment of the Islamic State. The answer could lie in the complex cultural basis on which the organization functions. To achieve a better understanding, it may be instructive to consider a model for understanding corporate cultures proposed by Edgar H. Schein. In his book, *Organizational Culture and Leadership*, Schein suggests there are three levels of culture: artifacts at the top

level, beliefs and values in the second and underlying assumptions in the third. Figure 1 depicts a graphical model of Schein's levels of culture.

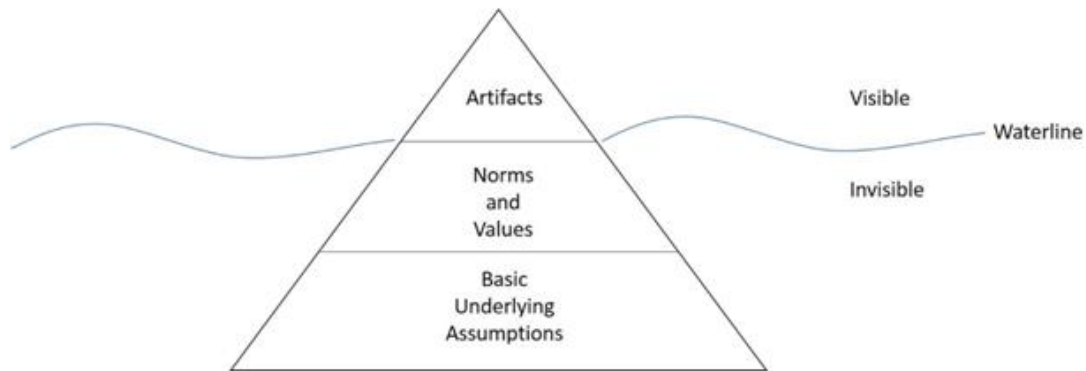


Figure 1. Schein's Levels of Culture¹²

Artifacts are those things visible from outside the organization such as the organization's climate, structure, and processes. Beliefs and values are the strategies, goals, and philosophies of the organization, which are reflected in the artifacts but usually cannot be seen by a casual witness from the outside. Underlying assumptions are the unconscious beliefs, perceptions, thoughts, and feelings that are so much a part of the organization, they are taken for granted and cannot be seen from the outside.¹³ Schein warns, "It is especially dangerous to try to infer the deeper assumptions from artifacts alone, because one's own interpretations will inevitably be projections of one's own feelings and reactions."¹⁴ This may well be what is happening when coalition forces try to understand the Islamic State's operational environment. Artifacts are misinterpreted as reflections of one's own perceptions and biases instead of being defined by the deeper levels of values and assumptions that are normally invisible and much more difficult and complex to understand. In order to correct this flaw, strategic

planners must begin by understanding the operational environment in the context of the Islamic State's norms and values and their basic underlying assumptions.

The Islamic State

The Islamic State follows the Sunni Muslim religious tradition known as Salafism, which originated from Wahhabism founded by Muhammad Ibn Abd al-Wahhab in the early 1700s.¹⁵ This strict form of puritanical Islam insists on the exact following of Islamic practices, rule under Sharia, or Islamic law, and enforcement through the hadud, or Islamic punishment. Wahhabism is widely practiced in Saudi Arabia and is found in other parts of the Middle East, including parts of Iraq.¹⁶ Ibn Abd al-Wahhab believed that the time of the Prophet Muhammad in Medina represented the ideal of Muslim society. Salafism follows the strict, puritanical doctrine of Wahhabism but takes it to an even more conservative level by attempting to combine Wahhabism with an effort to emulate the ideal Muslim society at that time in Medina.

The Islamic State first appeared on the global scene as a subsidiary of Al Qaeda. Al Qaeda in Iraq launched a successful campaign against the United States and eventually attempted to declare a Caliphate in Diyala Province, Iraq, in 2007 against the wishes of Bin Laden and Al Qaeda.¹⁷ Between 2007 and 2009 the Islamic State in Iraq suffered many defeats to United States surge forces and Sunni Muslims who turned against them for their brutal tactics and attacks on fellow Muslims in what came to be known as the "Sunni Awakening."¹⁸ In December of 2009, the Islamic State in Iraq published its "Strategic Plan for Reinforcing the Political Position of the Islamic State in Iraq" which outlined the strategic policies ISIS would follow to strengthen its position.¹⁹ While the strategic plan contained much rhetoric and revisionist history, it also laid out the plan for ISIS to wait for the United States departure from Iraq in order to resume

operations and “seize the reigns of control over all Iraq.”²⁰ The plan recommended uniting with other jihadist factions in Iraq and stopping attacks on Americans since they were leaving anyway. The targets of focus after the United States departure were to be Iraqi military and police to instill fear in the populace and potential recruits and cause Iraqi forces to leave their bases in Iraq where they were weak in order to reinforce other areas of Iraq.²¹ The plan stated Islamic State could take advantage of these conditions to seize territory, equipment, and infrastructure the Iraqi forces would leave behind.²² By 2010, the Islamic State in Iraq made the strategic decision to forego any major operations until the scheduled American departure from Iraq in 2011 as part of a larger IS strategic plan.

The timing of the United States departure from Iraq, the publication of the Islamic State’s strategic plan, and the launch of an ISIS information campaign coincided almost perfectly with the chaos and power vacuums created by the Arab Spring. With the Arab Spring and Syrian Civil War in full swing in 2011, Al Qaeda’s new leader following Bin Laden’s demise, Ayman al-Zawahiri, ordered the Islamic State to open a new front in Syria and join the Al Qaeda affiliate already fighting there--the Nusra Front.²³ By 2013, ISIS and the Nusra Front controlled significant territory in southern and northern Syria. In early 2014, the Islamic State declared Raqqa, Syria, its capital and began plans for expanded operations in Iraq. By the end of January 2014, the Islamic State reached Falluja and Ramadi, seizing control of most of the territory in between while ruthlessly fighting and defeating rival factions.²⁴ The culmination of the Islamic State’s operations in 2014 was the rapid, nearly uncontested, capture of Mosul in June. On June 29, 2014,

the Islamic State announced in what amounted to a media blitz in five different languages the establishment of an Islamic Caliphate.²⁵

Since its departure from Iraq in 2011, the United States has taken a lead-from-behind approach to the situation in Iraq as well as the rest of the Middle East and North Africa. This approach almost certainly had to do with the combination of the recent departure from Iraq and a desire to avoid getting bogged down in the chaos that spread across the region following the Arab Spring. However, this approach only emboldened the Islamic State. Weakened governments, porous borders, and a very effective information campaign allowed jihadists to fill the ranks of the Islamic State and spread their influence across the region until the threat to United States interests was undeniable.²⁶ By the end of 2014, the Islamic State controlled large swaths of territory in Iraq and Syria and had revenues of over \$2 million per day from oil sales and another \$12 million per month through extortion, making it the richest terrorist network in the world.²⁷

Today, the United States is working feverishly to reverse the course that was set because of the missed signals and misunderstanding of the Islamic State's intentions and capabilities. Limited military operations are being conducted by U.S. Special Forces while coalition air strikes are used to weaken ISIS strongholds, attack their forces directly, and damage the economic infrastructure that is providing revenues to the state. The United States is also encouraging the establishment of an Islamic Coalition to combat the Islamic State, harkening back to the lead from behind approach from 2012-2014.²⁸ The efficacy of the Muslim Coalition approach is a matter of great debate due to competing interests in the region and governments and economies that are struggling to

recover from the Arab Spring, the Great Recession, and low oil prices. Finally, the U.S. is supporting moderate factions in Syria in its fight against the al-Assad regime and the Islamic State.

The Islamic State's Operational Environment

The Islamic State goes by many names, depending on its evolutionary timeframe and how the organization is marketing itself. To be clear, Al-Qaeda In Iraq (from 2004-2007), the Islamic State, the Islamic State in Iraq, the Islamic State in Iraq and Syria, the Islamic State in the Levant, and the Islamic State in Iraq and as-Shams all refer to the same organization. A more recent way to address the Islamic State, which some media, military, and political leaders have adopted, is to use the Arabic translation of the acronym for I-S-I-S which is D-a-e-s-h. While Daesh is only an acronym in Arabic just as it is in English, the idea of using an acronym to describe something like the Islamic State is considered by some to be a direct challenge to its legitimacy and, therefore, a more suitable way to refer to the Islamic State.²⁹

The Islamic State is Not Al Qaeda

The Islamic State is often viewed as one of many terrorist organizations, arbitrarily lumped together, that share similar characteristics. While at a superficial level that may be true, it is generally not helpful and obscures some of the fundamental differences that make the Islamic State unique. Most often, the Islamic State, is directly correlated as being similar to or the same as Al Qaeda. Although the Islamic State's origins are undoubtedly found in Al Qaeda, they are different organizations. Correlating Al Qaeda with the Islamic State is a dangerous assumption because the international community was, in large part, successful at containing Al Qaeda. This would lead policy makers, strategists, and planners to assume the same strategies that worked to contain

or defeat Al Qaeda will work on the Islamic State. This is a flawed assumption because Al Qaeda and the Islamic State are not the same. They have vastly different philosophies regarding territories and the caliphate, politics and religion, treatment of fellow Muslims, need for support from the populace, and different overall capabilities to raise funds, conduct operations, and recruit.

The vast majority of violent extremist organizations (VEOs), including Al Qaeda, do not endeavor to hold territory because it does nothing to advance their cause and can lead to significant vulnerabilities. Running a terrorist organization or an insurgency is difficult, but simultaneously governing territory and establishing known bases is dangerous, opening them to military attack and exposing them to popular uprisings. Even the Islamic State founder, Abu Ayub al-Masri, recognized the dangers and stated, "Every monotheist knows...that the change from jihad to the state of ruling--the rule of God on the earth--and the return of the Islamic caliphate is a dangerous matter."³⁰ Al Qaeda heeded this danger and did not dare to occupy territory or declare a caliphate until it had established widespread popular Muslim support, or the support of the "umma," or greater Muslim community. For Al Qaeda, conquering land and establishing a caliphate was a very long-term goal. The Islamic State, on the other hand, seeks to gain and hold territory, it is a requirement to fulfill the apocalyptic religious prophesy.

Most VEOs, including Al Qaeda, have interests that are politically motivated and use religion as a basis to gain support in order to bring about political change. Conversely, the Islamic State is primarily a religious organization and uses politics and operations to support its religious ideology. Al Qaeda's primary political aspirations included attacking the United States and purging westerners from Muslim lands in the

Middle East and North Africa. The Islamic State uses religion as the basis for everything it does including how it formulates its plans and policies, how it governs, and how it enforces Sharia using the hadud, which is the Arabic term for Islamic punishment.

Most Muslim jihadist organizations, including Al Qaeda, believe wide Muslim support is critical for achieving their goals, and attacking other Muslims will lead to defeat and failure. Al Qaeda encouraged its factions to implement Sharia and hadud with restraint to win over the support of tribes and avoid starting blood feuds.³¹ In providing guidance for insurgencies, Bin Laden asked Al Qaeda factions to “cooperate with other Sunni rebel groups; don’t kill tribesmen even if they collaborate with the enemy; don’t broadcast the execution of prisoners; and avoid attacks on Muslim civilians even if they’re ‘heretics.’”³² Consider Al Qaeda’s policies in juxtaposition to those of the Islamic State. The ISIS has declared every Muslim that does not support apocalyptic Sunni Islam a heretic, apostate, and sworn enemy. The ISIS brutally enforces Sharia with hadud and performs public punishments and executions with regularity. The ISIS videos its brutal practices and then distributes them for the world to see through an effective marketing and information campaign. The majority of the people killed by the Islamic State since its rise to power have been Muslims.

Finally, Al Qaeda is not nearly as capable as the Islamic State in terms of ability to conduct operations, raise funds, and recruit. The Islamic State, with approximately 31,000 fighters from 86 countries, is capable of conducting independent operations with modern equipment captured from Iraqi Security Forces.³³ Furthermore, they have rapidly progressed in their demonstrated capacity for conducting fairly complex and effective combined arms maneuver--very atypical for a VEO. Al Qaeda primarily relied

on contributions from Islamic sympathizers for funding, and its income is paltry compared to the Islamic State. ISIS raises funds from its governance and ability to collect taxes, extortion, and black market oil trade and is the richest terrorist network in the history of the world. Al Qaeda was never able to recruit effectively from outside the Muslim jihadist community. The Islamic State has recruited and trained a large force from within the jihadist community and from a long list of Western countries, including the United States.³⁴

The Islamic State's Ideology

Nearly every religion has an apocalyptic story that attempts to explain how the world will end. Islam is no exception. The Islamic State's apocalyptic prophesy says that the armies of Islam will meet with the "Armies of Rome" in Syria and that a final fight with an anti-messiah in Jerusalem will occur after the Islamic conquest. After a great battle in Dabiq and Istanbul, the anti-Messiah will kill Islamic State fighters until 5,000 remain and then Jesus will return to kill the anti-Messiah and spark the beginning of the apocalypse.³⁵ The leader and "Commander of the Faithful" of the Islamic State, Abu Bakr al-Baghdadi, refers to the desire to fight Christians and Jews, the religious nature of the Islamic State's objectives, and the prophesy in a sermon given on November 13, 2015.

The Crusaders' airstrikes – day and night – upon the positions of the Islamic State have not prevented its advance, nor weakened its resolve. And the agents of the Jews and Crusaders, their slaves, tails, and dogs, could not hold out in the face of the Islamic State, and they will never hold out against it. And indeed the Crusaders will be defeated. By Allah's permission, they will be defeated. And indeed the Muslims will be victorious. By Allah's promise, they will be victorious. And the march of the mujahidin will continue until they reach Rome.³⁶

While it may be easy for outsiders to dismiss such a prophesy, those who faithfully believe in the Islamic State are ready and willing to tenaciously fight and die for it. The purely apocalyptic nature of the Islamic State's goals makes them more violent and more religious than all other terrorist organizations.³⁷ The prophesy provides the primary motivation for Islamic State jihadists to fight and die heroically as martyrs.

To fulfill the Islamic State prophesy, an important and significant obstacle exists – legitimate establishment of Islamic State--the Caliphate. The self-proclaimed Caliph, or leader, of the ISIS, Abu Bakr al-Baghdadi, announced the establishment of the Caliphate in June 2014, and at the same time denounced all other Muslim emirates and governments as illegitimate, as ISIS finally shook off the borders imposed on it by western imperialists.³⁸ In this regard, the ideology of The Islamic State as an international terror organization is unique and, perhaps, unprecedented.

Establishing a Caliphate requires that the Islamic State capture and hold ground, govern the people of the Islamic State, provide a medical system, collect taxes, and in return for tax collection, provide basic services. The Islamic State holds ground in Iraq, Syria, and Libya and has a presence in Yemen, Afghanistan, and Egypt.³⁹ However, the territorial goals of the Islamic State do not end in this part of the world. During a speech in 2013 the spokesperson for the Islamic State, Abu Muhammad al-Adnani, said, "We won't enjoy life until we liberate the Muslims everywhere, and until we retrieve Al-Quds (Jerusalem) and regain Al-Andalus (region around Spain), and conquer Rome (interpreted as the west)."⁴⁰

Islam provides the foundation of rule for the Caliphate and very strict interpretations of the Qur'an, Sharia, or, Islamic law, and the Hadith, which is a series of

books on the sayings of the prophet Mohammad.⁴¹ Islamic law is the basis for takfir, and the Islamic State uses takfir as the justification for killing apostates in order to expand the territory of the Caliphate while condemning to death any and all who oppose them. Takfir is the Islamic tradition of declaring another person a heretic or apostate in order to justify violence against him.⁴² It is noteworthy that capital punishment for apostasy is not a widely accepted Muslim practice. Algeria, Egypt, Kuwait, Morocco, Tunisia, Mauritania, Sudan, and Yemen have forms of punishment that are less stringent and range from prison sentences to virtually no punishment at all.⁴³

The Islamic State Jihadist Fighter

The Islamic State is recruiting from fertile ground in the Middle East and North Africa where a youth bulge and unemployment combine to provide a group of disenfranchised males looking for meaning, work, and the opportunity to be a part of something bigger than themselves. Studies have shown a strong correlation between societies with large youth bulges and civil conflict. One such study reports that between 1970 and 2007, 80 percent of new civil conflicts began in countries where the median age of the population was less than 30 and that countries with a large youth bulge are 150 percent more likely to have experienced civil conflict in the last half of the 20th century.⁴⁴ In 2015, the median ages of countries in the Middle East and North Africa (MENA) included Egypt – 24.7, Iraq – 19.3, Libya – 27.5, Mauritania – 19.8, Syria – 20.8, and Yemen – 19.3.⁴⁵ Unemployment in the MENA is very high at about 12 percent, and unemployment among youth is the highest in the world at nearly 25 percent.⁴⁶

The Islamic State has been most successful in its use of social media and its ability to recruit, resulting in a strong relationship between the two. The Islamic State

has expertly constructed a tapestry of social networking messages through Twitter and Facebook targeted at youth who are tech savvy and able to access recruiting propaganda. The Center for Strategic Counterterrorism Communications, a State Department Agency, stated that the challenge of countering ISIS' social media campaign is difficult with the organization sending out as many as 90,000 messages each day.⁴⁷ Tweets like the ones under #FightForHim specifically target potential recruits, young potential recruits most apt to follow the Twitter feeds. These youth, often unemployed without strong ties to family or social structures to keep them in place, have ample time to study the alluring possibilities of joining the jihad. However, it is not just the disenfranchised and unemployed youth of the MENA that are joining the cause. Other Muslims are being shamed into action by clever messaging that warns, "If you claim to follow the prophet...then show us that! Saying without working is a distinct characteristic of hypocrites!"⁴⁸ Other messages encourage joining the cause through lone wolf attacks--"You are a Muslim? Living in the West? Being a city wolf is your task! You are already 'citizens,' and no doubt you are the suitable ones to carry out such a task. You are sharing the same land with them! The same busses and trains, the same neighborhoods!"⁴⁹ The Islamic State had recruited at least 27,000 fighters by December 2015, and the number of fighters from Europe increased to more than 5,000.⁵⁰ When the Islamic State recruits a new fighter, a period of training and indoctrination begins.

New recruits receive training in military tactics, weapons, Islamic State ideology, and religion. The Islamic State uses its apocalyptic prophesy to create a mentality that ISIS is correctly predicting the future and everyone else is wrong and, therefore, only the members of The Islamic State will be on the right side of God when the end of the

world comes.⁵¹ The combination of harsh military training and elitist religious indoctrination builds a strong sense of belonging and camaraderie in the group. Alienating recruits from their former social structures makes departure from the group a difficult task.⁵² While a Jihadist committed to the Islamic State may be using distorted, inaccurate, and misleading interpretations of Sharia, Hadith, and the Qur'an, to that person, the interpretation is correct and as compelling and important as conservative interpretations more common in the Muslim world. Through this carefully structured process of recruiting and indoctrination, Islamic State fighters come to a deep understanding and belief about their cause, their religion, and what they must do to contribute to the victory of the organization, which ultimately requires nothing less than their own death, martyrdom, and as a result, paradise.

To further alienate its members from their former origins, whether they are from the MENA or the West, the Islamic State requires all Muslims to pledge allegiance to their new ruler and "reject democracy and other garbage from the West."⁵³ A similar indoctrination process occurred during World War II among the Hitler Youth, many of whom would go on to serve in elite SS Divisions. Hitler Youth officers separated new recruits from their families and sent them to training camps where they participated in paramilitary exercises, recited Nazi slogans and propaganda, and sang Nazi anthems and Hitler Youth songs.⁵⁴ The indoctrination of Hitler Youth resulted in boy soldiers who shocked the British and Canadian soldiers who confronted them with their hatred, racism, savagery, and reckless bravery. Unlike the Wehrmacht, Hitler Youth would not surrender. If faced with tanks, Hitler youth would surge forward in groups and attack the tanks. If surrounded, they would fight on until there were no survivors.⁵⁵ Unlike Islamic

State recruits, Hitler Youth were indoctrinated by a political ideology. The religious ideology of the Islamic state is arguably a much more powerful indoctrination apparatus.

The comparison to Hitler Youth is useful not only because it illuminates the power of indoctrination, but also because the Islamic State has a similar program for indoctrinating their youth. Child soldiers of the Islamic State train at remote military training facilities and are taught lessons on religion, religious enforcement, weapons, and military tactics.⁵⁶ The Islamic State calls the children in training “Cubs of the Caliphate,” and states publicly that they are the next generation of Jihadists.⁵⁷ The children, estimated to be around 10 years old, have been seen in ISIS videos participating in mass executions, executions at point blank range, and beheadings.⁵⁸

First and foremost, an Islamic State Fighter understands he exists to fulfill the apocalyptic prophesy in which victory requires that the jihadists fight to the death in order to achieve victory. When death and victory are the only possible outcomes, they are one and the same. No room for surrender, political appeasement, or negotiation exists. The sole mission for an ISIS fighter, in accordance with their prophesy, is to fight to the bitter death. The idea of fighting and dying to fulfill an apocalyptic ideology is not appealing for the vast majority of Muslims, but for some it is a powerful higher religious calling for which they willingly lay down their lives. An Islamic State fighter can also find great appeal in the religious calling to live as the prophet Mohammad lived, who was simultaneously a religious, political, military, and social leader. Islamic fundamentalism requires that Muslims live their lives in the footsteps of their prophet, creating a religious example for ISIS to demand absolute compliance to Islamic law and the social norms of the group under the punishment of death for violation of takfir.

Once on the inside of the Islamic State, there is virtually no way out. Jihadist fighters can either die for Allah and the cause of the Islamic State, or they can die at the hands of their comrades if they are caught trying to escape. Only strict adherence to the belief structure of the Islamic State is tolerated and any attempt to question, undermine, or deviate from the structured order of the group results in harsh punishment or death. One example of the brutal internal enforcement took place in February 2015 when the head of an ISIS commander was found on a stake with a cigarette dangling from the mouth. A note on the corpse nearby read, "This is not permissible, Sheikh."⁵⁹ Even attempts from the outside to have loved ones defect from the group draw deadly consequences. In one particularly harsh example, Islamic State commanders ordered a fighter to execute his mother after she encouraged him to defect from the Islamic State. He complied, shooting her in public in front of about 200 people in the city of Raqqa.⁶⁰ Information flowing from Islamic State propaganda suggest public executions happen almost continually.⁶¹

Most people, including the West and the majority of Muslims, find the teachings, prophesy and goals of the Islamic State incomprehensible. However, potential recruits and fighters alike find allure in the Islamic State for personal rather than political reasons.⁶² Search for meaning, religious calling, adventure, and friendship are the primary reasons for joining.⁶³ The sweeping victories of the initial military offensive by ISIS in 2014 are a major source of legitimacy for the organization. Muslims who doubted that Al-Baghdadi could be the Caliph of the prophesied Islamic State took note when the group seized, held, and managed large swaths of territory including many towns and some large cities. The Islamic State has also been surprisingly effective at administering

state functions such as law enforcement, orderly public executions, banking, police, running an economy, regulating market prices and providing basic services like medical care and trash removal.⁶⁴ The Islamic State's strict adherence and enforcement of Islamic Law also adds to the perceived legitimacy of the group. Formerly, many viewed Saudi Arabia as a strict enforcer of Sharia, but ISIS chastises Saudi Arabia for its loose interpretations and enforcement of Islamic Law.

The Islamic State's Operating Environment

The U.S. invasion of Iraq is now widely believed to have provided the circumstances for Al Qaeda in Iraq and later, the Islamic State, to grow and thrive in Iraq and neighboring countries.⁶⁵ Not only did the invasion result in a greatly weakened Iraq that still struggles with the Shia-Sunni sectarian rift, but it also left a large number of effective Baath Party military officers and public administrators without jobs or opportunities for a strong future under the new Iraqi administration. While the number cannot be known exactly, it is clear former Baath Party Iraqi military officers and public administrators provide the core of personnel who are leading and running the Islamic State's de-facto government and military.⁶⁶ Former Baath Party Iraqis run three of the most important ministries in the Islamic State including the ministries of military, finance, and security.⁶⁷ Iraq's instability offered an opportunity for the Islamic State to operate and gain influence, first as Al-Qaeda in Iraq and later as the Islamic State. Iraq is also the environment where the Islamic State would perfect its insurgent operations and begin its practice of public beheadings and suicide bombings.

Widespread discontent in the Middle East and North Africa led to the Arab Spring in 2010. Rather than increase good governance and human rights, the Arab Spring has created a region in the MENA marked by instability, weakened states and violence. The

instability created by the Arab Spring extended the territorial opportunities for the Islamic State that were initially created following the U.S. Invasion of Iraq in 2003. While the Arab Spring may help spur democracy and stability in the long run, in the short term, it has created social, political, and economic instability that ISIS continues to exploit. Iraq, Syria, Lybia, and Yemen are struggling with civil war. Egypt has moved away from human rights and good governance. Governments that remain intact are consumed with maintaining control and cannot divert resources to problems that, for the time being, are outside of their borders.⁶⁸ The situation in Syria has had a particularly devastating effect where 250,000 people have lost their lives and more than 11,000,000 people are war refugees, most of whom, have fled to Europe.⁶⁹

The response of Western nations has been limited. The United States, France, the United Kingdom, and Russia are all involved in fighting focused in Syria. The United States, France, and the United Kingdom are primarily providing air support and intelligence, surveillance, and reconnaissance assets to support the Assad opposition fighters and to target ISIS in Syria and Iraq. Russia is reinforcing the Syrian Assad regime. Varying national interests have created a tangled web of conflict in the region in which it is difficult to discern exactly who is fighting whom and why they are involved. This creates tenuous situations such as America's support of Assad opposition fighters and Russia's support of Assad's government, which results in proxy war between the United States and Russia. Tensions do not end there. Iran, a Shia majority country, is supporting Iraq, another Shia majority country, in combating a Sunni extremist movement in the form of the Islamic State while also backing the Assad regime with Russia and against the United States.⁷⁰ Saudi Arabia backs Assad opposition groups

and is a longtime rival of Iran who recently accused the Iranian regime of attempting to create instability in the Saudi Kingdom through the Shia minority there.⁷¹ Like the United States, Turkey backs Assad opposition forces and risks escalation with Russia through proxy which became very real when Turkey shot down a Russian fighter in November 2015.⁷²

The Islamic State's Strategy

United States joint doctrine defines a line of effort as using cause and effect to focus efforts toward establishing operational and strategic conditions by linking multiple tasks and missions.⁷³ If the Islamic State were to draw its strategy along lines of effort it could possibly use fulfillment of prophesy, legitimacy, brutality, and sectarian divide as strategic focus areas. To outsiders, it is difficult to understand the strategy and objectives of the Islamic State. It is tempting to conclude that ISIS is an organization of religious extremist psychopaths who commit crimes and murder to intimidate and gather power. While this may illuminate some of the methodology of the Islamic State, it does not explain the strategy and underlying objectives for what it is trying to achieve. In reality, the Islamic State approaches strategy systematically using a variety of methods to achieve strategic objectives and even quotes Sun Tzu and other classical military theorists in strategies and policies.⁷⁴

The most important aspect of the Islamic State strategy is to draw the West into a full-scale war to fulfill the prophesy. Without the great battle between Islam and Rome, or the West, the doomsday prophesy is baseless. The Islamic State has repeatedly tried to lure the West into confrontation by attempting to destabilize U.S. interests in the region, affecting oil prices, murdering and beheading "apostates," destabilizing the Iraqi regime, and encouraging lone wolf and coordinated attacks against America and other

Western nations. On the occasions when U.S. forces appeared to escalate efforts against the Islamic State, ISIS social media stirred with excitement and anticipation of the opportunity to fight the West and move a step closer to fulfilling the prophesy.⁷⁵

Legitimacy is another key tenant of Islamic State strategy. To produce the perception of legitimacy, the Islamic State must continue to expand and control territory, provide governance and basic services, recruit to grow the organization, and propagate its message through social media and other media outlets. The Islamic State will continue to create problems for unstable regimes and instigate social and economic chaos to expand territory regionally and influence internationally. The Islamic State thrives in chaotic environments where governments are struggling to retain control and the nation is in a fragile state. Islamic State leaders have proven skillful at taking advantage of chaos in Iraq, Syria, Libya, and Yemen to seize additional territory and expand influence. Providing governance and basic services is necessary to make the claim of being a “state” that can provide for its people. Recruiting provides the people necessary for the Islamic State to function and replenish losses sustained in combat operations or resulting from coalition air strikes. The ISIS uses social media to distribute its propaganda videos, messages, and newsletters. The Islamic State also manipulates traditional media to keep stories and actions on the front pages of news websites and newspapers around the world.

The next tenant, brutality, is essential to the Islamic State’s strategy. As mentioned previously, “takfir” is the mechanism the Islamic State uses to justify extreme violence against fellow Muslims. By invoking takfir, the Islamic State’s interpretation of Islamic law justifies brutality and simultaneously intimidates potential enemies and

defectors. The objectives are to instill fear, add to their perceived legitimacy through a demonstration of power, provide a tool to recruit young, angry men who may want to be a part of the ruthless violence, and draw Western nations into a more direct conflict.

Since July 2014, the Islamic State has openly committed a steady stream of violent acts including mass murder, sexual slavery, public beatings, stonings, crucifixions, beheadings and other forms of execution. The Islamic State fights with a “take no prisoners” mentality and believes in the Machiavellian principle that it is better to be feared than loved. When the Islamic State does take prisoners, it is not for bargaining or political gain. The purpose is to kill them in the most abhorrent ways imaginable and capture the executions in photographs and video. ISIS uses these recordings to strike fear into the hearts of their enemies and those in the populace who might dare to oppose. ISIS also uses brutality to control information and send a powerful message, as demonstrated by the deliberate effort to apprehend and murder journalists who enter their territory. The message is clear; if a journalist enters the Islamic State, that journalist dies.⁷⁶ Through violence, information control supports the larger information campaign.

The Islamic State’s brutality projects an image of power, and by appearing to be a state with great power it hopes to increase legitimacy. To most of the civilized world, joining a group like ISIS and engaging in ghastly atrocities is unthinkable, but for some, taking part in violent acts sanctioned by a distorted religious doctrine is indeed appealing. ISIS is also using brutality to control the Sunni tribes through murder and intimidation. Finally, acts of violence carried out against citizens of Western nations are intended to draw the governments of those nations deeper into conflict with the Islamic

State and to cause the populace of Western nations to push for expanded involvement, including committing ground troops. The most disturbing part of the Islamic State's brutality line of effort is that it is working. Few under the control of ISIS have the power to resist and those who try, are summarily killed or executed to deter others from making the same mistake.

In the final line of effort, the Islamic State uses the Islamic schism between Sunni and Shia Muslims to provoke violence on both sides and take advantage of the resulting instability and chaos. The origins of the Islamic State can be traced back to the sectarian divide in Iraq where the new ruling Shia majority suppressed former Baath Party Sunnis, and the Sunnis violently rose against growing Shia power.⁷⁷ The Islamic State's hatred of the Shia is deep and seething. The ISIS refuses to call the Shia by the name, "Shia." Instead, ISIS refers to them using the derogatory term "Rafidah," "the twelve pretenders" based on the tradition of the 12 Imams of Shia Islam, or "the Jews of Islam."⁷⁸

The Sunni Islamic State openly challenges all religious groups, including Sunni and Shia, and draws them into conflict with the Islamic State as well as with one another. Drawing ideology strongly along Sunni lines also creates inaction on the part of other Muslim states that want to avoid the perception fighting a war of religion against fellow Muslims who are from another sect of the same religion. The line the Islamic State draws between Sunni and Shia creates increased sectarian tensions as countries like Iran join Iraq in the battle against ISIS while trying not to aggravate already rising sectarian tensions with Sunni majority countries like Saudi Arabia, Bahrain, United Arab Emirates, and Sudan.⁷⁹ Rather than confront the Islamic State along a united front of

Muslims against a minority sect of extremist Islam, Sunni and Shia majority countries are taking sides against each other, weakening any chance of a unified Muslim effort to defeat The Islamic State.⁸⁰

SWOT Strengths

The Islamic State's greatest strength is arguably the ability to manipulate information through the internet and social media. This not only draws attention to the cause and creates a great deal of focus by the media, but also helps with recruiting. The Islamic State's sophisticated propaganda machine is capable of producing high quality videos and written products that do a surprisingly good job of sticking to the core messages, objectives, and strategic priorities of the organization. ISIS' online magazine, "Dabiq," expertly intertwines messages for internal and external audiences to further the cause and is available in Arabic, English, French, and Russian.⁸¹

Dabiq issues are typically about 50-60 pages long and utilize modern graphic art techniques, high resolution photographs, and fanatical writing to recruit, teach, guide, and indoctrinate current ISIS jihadists and to target, warn, frighten, and intimidate adversaries. Several themes are found in every issue. The first is to glorify and memorialize those who have died for the Islamic State and those who have taken great risk in the spirit of Islam, praising both under the category of "shuhada" an Arabic word related to the Islamic spirit and martyrdom.⁸² A section provides advice to Islamic State fighters, and another provides advice to the "sisters," or, females who are among their followers. The magazine always includes a section on history that typically either revises history to their advantage or demonizes ISIS enemies using some sort of distorted historical basis. Another recurring feature is a section highlighting ISIS military operations, typically balanced between coverage of conventional attacks and suicide

attacks. The magazine concludes by interviewing an ISIS fighter or leader. “Selected Ten” videos separate magazine sections and a typical issue provides 30-40 video suggestions to further the propaganda effect beyond the pages of the magazine.⁸³

Twitter, Facebook, Dabiq, videos, and other internet outlets allow the Islamic State to project itself and send messages in a way that best aligns with its strategies. This information campaign, combined with an effective counter-information campaign that essentially eliminates balanced media reporting from areas under ISIS control, provides an unprecedented dominance over the information domain.

SWOT Weaknesses

Managing the Islamic State is an enormous undertaking requiring a large bureaucracy, an effective military and police force, and large sums of money. As the Caliphate expands, all the systems that support it, to include the revenue required to pay for it all, must also expand. The initial successes in Iraq netted a great deal of modern military, mostly U.S., equipment. Struck with fear by the brutality of Islamic State offensive operations and the videos and messages propagated on social media preceding ISIS attacks, most Iraqis fled, leaving their equipment behind. The Islamic State used this equipment to capture additional territory, adding to the perceived legitimacy of the Caliphate. However, the opportunities for the Islamic State to capture large quantities of weapons and equipment, as it did in Iraq, have dwindled. As time goes on, the monetary and logistical burdens of maintaining and repairing that equipment will begin to take its toll.

The Islamic State increases revenue by conquering new territory and collecting new taxes, but this is also a perishable resource. Since outside commerce is nearly impossible with Islamic State territories, monetary resources will diminish and “citizens”

of the Caliphate will have no means for regenerating income for subsequent tax collection.⁸⁴ As refugees continue to pour out of Syria and Iraq, their primary source of taxation decreases. No state can function without revenues to pay salaries and meet the needs of the people. The Islamic State's money problems will almost certainly increase over time and could have a crippling effect on power and legitimacy.

The strategic narrative of the Islamic State and its legitimacy are suffering as losses and setbacks accrue. The United States military estimated in February 2016 that ISIS had lost 40 percent of the territory captured in Iraq and 20 percent of territory captured in Syria.⁸⁵ This is a significant problem for the Islamic State because it attributed early victories and conquests to the direct intervention of God. Recent defeats, losses, monetary problems, and lost territory leave ISIS struggling to explain what happened to God's support.⁸⁶

SWOT Opportunities

The greatest opportunity for the Islamic State to add to its legitimacy and recruiting base could quite possibly be luring the United States and other Western countries into a ground war with the group. Doing so gives the appearance of the prophecy coming true and would provide an unprecedented incentive for Muslims who were on the fence about whether or not to join the effort to come to the aid of the Islamic State to defeat the Western imperialists. Continued instability and weak states resulting from the Arab Spring provide large swaths of territory with only limited potential resistance, such as in Libya, where the Islamic State could potentially seize additional territory and increase their perceived legitimacy.

Another opportunity is for The Islamic State to significantly increase the number of recruits that join the effort from competing militias and ideologies. An increase in

recruits from other terrorist organizations would potentially provide experienced fighters and administrators, adding to the strength of the Islamic State while illuminating the weaknesses of Islamic State rivals. Such an increase in recruiting would also serve as a strong indication that the apocalyptic calling is taking root among more Muslims and that the propaganda machine of ISIS is having desired effects. A sudden boost in recruiting could also be achieved if Al Qaeda were to cease to exist as a result of the Islamic State's preeminence. If Al Qaeda dissolves, thousands of jihadists and Al Qaeda factions would suddenly be available to join the ISIS cause, drastically increasing its size, capabilities, and global reach.⁸⁷

SWOT Threats

When Abu Bakr al-Baghdadi announced that he was Caliph and all other Muslim emirates and governments were illegitimate, he issued an existential threat to every Muslim nation in the world that they must either submit to his rule or be designated apostates subject to punishment, destruction, and death. In an instant, he made his proclaimed Caliphate the enemy of every Muslim nation in the world. In addition to declaring every Muslim nation an enemy, the Islamic State has rarely missed an opportunity to create more enmity. During one two-week period in November 2015, ISIS downed a Russian commercial jet killing 224, attacked civilians in Paris killing 129, and sent killer squads into Libya resulting in another 43 dead.⁸⁸

Western nations have responded to the Islamic State with air strikes and limited special operations support. Other declared enemies in the region have had difficulty mounting a coordinated response. If states, militant groups, and religious groups that ISIS swore as enemies were able to assemble a functioning coalition, the Islamic State would likely be quickly overwhelmed and defeated. The possibility of such a coalition

began to show promise in December 2015 when Saudi Arabia called on other Muslim nations to join them in an alliance to combat and defeat the Islamic State. The Saudi call to action resulted in 10 other Sunni Muslim nations expressing support for such an alliance.⁸⁹ The Cairo based Muslim Al-Azhar Institution followed by encouraging all Muslim nations to join the alliance to combat the Islamic State.⁹⁰ While this development is indeed promising, notable concerns emerge including lack of support from Shia majority countries, confusion about the roles and responsibilities of alliance members, and contradictory regional interests.⁹¹

Maintaining good governance and a tolerable level of support from the populace is an ongoing threat to the Islamic State. Establishing a state and implementing formal governance makes the Islamic State an easier target for coalition forces, rival factions, and insurgents. The Islamic State is designating government administration buildings, banks, and police stations for those under their rule to utilize which makes many of the controlling mechanisms for their system of governance public knowledge and, therefore, easier to target.

In the short term, ISIS has managed to overcome some of its governance shortfalls through sheer brutality. However, in the long term, this is rarely an effective form of governance. As funding for public projects, medicine, food, and salaries decrease under coalition pressure, public support will also decrease. The majority of people living under Islamic State rule and a significant number of those who join the Islamic State to fight want to leave and return to a life of relative normalcy and peace.⁹² As regional efforts against the Islamic State take form and constant bombing raids

continue, ISIS is seeing an increase in the numbers of foreign fighters attempting to escape while their battlefield losses increase.⁹³

In a letter Bin Laden drafted for the leader of Al Qaeda in the Arabian Peninsula, he warns of the calamitous combination of brutality, lack of governance, and strangulation through sanctions and bombardment.

A revolutionary movement today needs more than just military might to topple a government or control a country. While putting aside the external enemy, a movement needs to have resources in place to meet the needs and demands of the society, as it makes its way to controlling a city or a country. A movement cannot expect, however, a society to live without for a long time, even if that society happens to be a great supporter of that movement. People often change when they see persistence in a shortage of food and medicine, and the last thing they want to see is having their children die for lack of food or medicine.⁹⁴

In this case, a clear strategic threat to the Islamic State is a clear strategic opportunity for coalition forces.

Strategic Implications

This paper reviewed the joint planning process, provided background of the Islamic State to set necessary context, described the Islamic State's operational environment, and provided some discussion of the Islamic State as an organization. Despite the breadth of this analysis, it frankly just begins to scratch the surface. One can argue that the United States must recognize the Islamic State threat for what it truly is - a religious ideological based rational actor that pursues clear policies, strategies, and objectives. While the Islamic State poses an existential threat to weak governments in the MENA regions where it operates and, potentially, to all Muslim nations, it does not yet pose an existential threat to the United States. While one can debate the level of U.S. interest in dealing with the Islamic State, the Islamic State is clearly an important interest that merits continued attention.

Accordingly, the United States should develop a more appropriately tailored strategy of containment to deal with ISIS. A closer study of the Islamic State and its operating environment leads to a deeper understanding that can help military planners see beyond their biases and assess the reality of what motivates and empowers ISIS. In that sense, it helps the planner to accurately assess the environment and problem, and then develop more focused and appropriate approaches to perhaps manage, rather than solve the complex problems. This strategy should be conceived in a deeper understanding, as described in this paper, and should consider several important strategic implications:

- Develop policy driven strategy,
- Understand the environment, define the problem, and develop an approach,
- Mitigate threat of regional war,
- Fight the enemy, counter the ideology,
- Leverage military theory,
- Exploit Islamic State strengths, weaknesses, opportunities, and threats,
- Anticipate and integrate the evolving U.S. regional interests.

While these implications are discussed in further detail below, it is important to highlight that their order is meant to convey a sense of priority. While this list is far from exhaustive, it is a good starting point for strategic planners to apply understanding-based methods to develop a strategy to contain the Islamic State.

United States Policy Drives Strategy Development

In the Middle East and North Africa, Western countries under the leadership of the United States should undertake extraordinary efforts to stabilize the economies and

governments of this region in order to address the roots of extremism. Addressing political and religious extremism undermines the recruiting and resource support of the Islamic State and supports containment strategy by offering productive alternatives to ideological extremism. An approach with “Marshall Plan” proportions should seek to provide unprecedented economic opportunities to the countries in this region in exchange for moderation of government control and liberties for citizens.⁹⁵ The Marshall Plan, or, European Recovery Plan, was based on the premise that economic revitalization was the key to political stability.⁹⁶ While providing economic assistance and develop programs may be very unappealing during a period of austere economic conditions and rising debt, the short term costs may be a small investment compared to the costs of long term regional instability.

Using a whole of government approach, the Department of Defense (DOD), Department of State, and the U.S. Agency for International Development would work together with mutually supporting objectives to improve security, governance, human rights, and economic opportunities. As quality of life and economic opportunities for the people of the Middle East and North Africa improve, ISIS fighters will decide either to remain in Syria under the brutal rule of ISIS, or to move back to their countries of origin where quality of life, liberty, and prosperity have improved. This strategic policy approach requires resolute diplomatic effort to persuade the countries most threatened by ISIS’ existence to contribute significant resources to a broad economic rehabilitation plan.

Simultaneously, the United States should continue to assist Muslim countries in the Middle East and North Africa with building a viable, capable coalition of Muslim

Nations to fight ISIS militarily in Iraq and Syria and to condemn their violent form of Islam. The best chance of defeating the Islamic State resides within the Muslim nations that do not subscribe to and are threatened by its existence.

Military strategy follows national policy. As this broad policy directive begins to have an effect, the military strategy would evolve to meet the changing conditions of the operating environment. Continuous divergence and convergence of strategic planning based on the conditions and characteristics of the operational environment is a key aspect of joint operational planning. Strategic planning working in concert with an international politics, economics, and diplomacy, has the highest probability of success. With a broad U.S. and international policy towards strengthening the economies and governments of the Middle East in exchange for improved governance and human rights, strategic planning can reinforce containment policy to reinforce and complement its effects.

Operational Design

The purpose of this paper is not to develop strategy, rather, it is to come to a deeper understanding of the operational environment of the Islamic State especially considering deeper cultural characteristics not visible to those on the outside. The importance of thoroughly understanding the society, culture, norms, and values that underpin and motivate the Islamic State is paramount in properly defining the problem, developing an operational approach, and producing an effective plan. The preceding description and analysis of the operating environment is really just a small sample of what needs to be accomplished much more broadly and deeply.

An updated depiction of Shein’s cultural model is shown in Figure 2. It includes many of the environmental influences inside the model, and outside influences arrayed above the waterline.

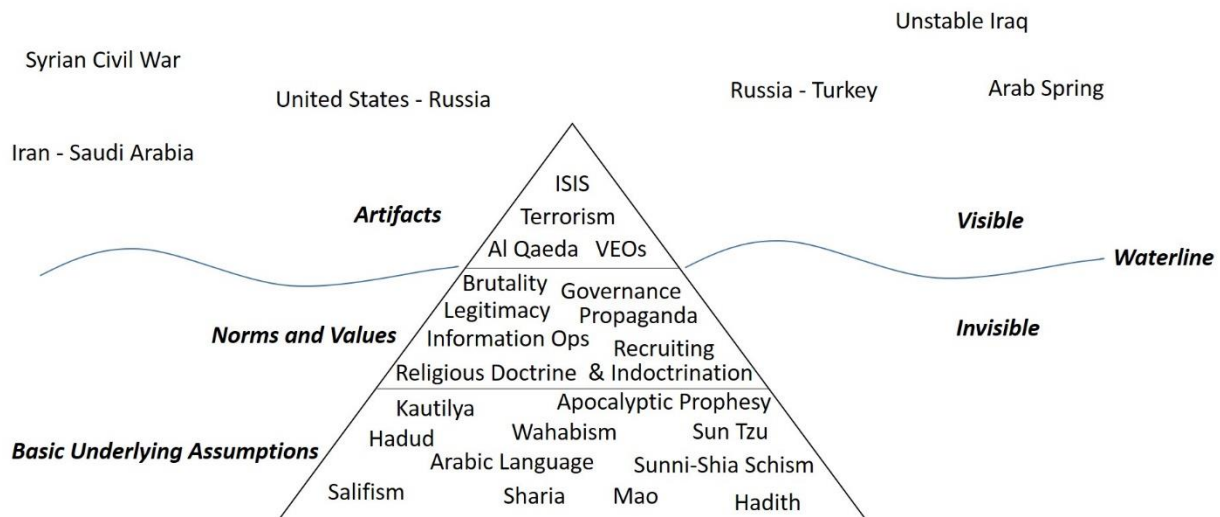


Figure 2. Shein’s Levels of Culture Updated for ISIS⁹⁷

To thoroughly understand what is happening below the waterline, and why, and relate ISIS to outside influences in order to properly define the strategic problem and develop an operational approach is a complex, ongoing task and one that must be accomplished to contain and defeat the Islamic State.

The level of expertise required for such a thorough evaluation does not typically reside among military strategic planners. Thorough understanding of such complex emotional, cultural, and religious topics would require years, if not a life-long commitment to studying Islam, including reading all of the Quran and the Hadith, understanding and fluently conversing in Arabic, and having personal experience with the Sunni-Shia schism and why it remains unresolved after nearly 1,400 years. A thorough and deep understanding of the norms, values, and assumptions regarding the Islamic State would need to be conducted by true experts in Arab and Islamic history,

the Arabic Language, Wahhabism, Salafism, and those who have made a career of studying wars of ideology and religion.

The DOD and the Combatant Commands should consider hiring or contracting this Islamic expert capability to augment planning staffs for extended time periods. Procuring an unprecedented level of deep expertise in a dedicated strategic planning staff would allow the understanding of the operational environment to be assisted by true, life-long experts in Islamic studies, Islamic cultures, Islamic history and Arabic. This would facilitate and reinforce strategic planning and military expertise among military officers who have made a life-long commitment to excellence in that field. Deeper study and understanding among military officers would certainly be valued and encouraged; however, to expect such a level of expertise in strategic planning and Islamic studies on the part of an academic expert or a military officer is simply unrealistic. In terms of containment, planners cannot determine the most effective objectives for religious moderation or subversion without a deeper understanding of the underlying motives of the Islamic State and its fighters. In order of necessity, planners must achieve understanding first, then integrate understanding into the containments strategy.

Threat of Regional War

The difficult and complicated situation in Iraq and Syria and especially the conflicts between Shia and Sunna and among Sunni tribes could cause the situation to grow into a larger, regional war with more actors, more violence, more refugees and more loss of life. The complexities of the region are confusing and dangerous. The involvement of a Sunni led alliance against the Islamic State may very well be the best of the worst options available to defeat them. However, this does not come without the

real and significant risk of efforts to control the chaos in the region spiraling into a broader regional war of militants against militants and states against states.

The most significant factor contributing to the risk of regional war is the intensifying schism between Sunna and Shia. Evidence supporting this widening rift dates back to the founding of Islam, but recent examples include the founding of rival sectarian political groups like the Shia Hezbollah, Sunni Muslim Brotherhood, and the Sunni Islamic State.⁹⁸ The deepening sectarian divide in the region will likely get worse before it gets better, especially if other extremist organizations follow the model of ISIS and intentionally exacerbate the problem. The Islamic State has declared every Muslim in the world that does not believe in its extreme form of Sunni Islam an enemy, to include Sunni Muslims and, of course, all Shia. One of the sources of the problem is the propensity for states in the region to oppress the religious minority. In Saudi Arabia, it is the Sunni oppressing the Shia and in Iran, and to some extent Iraq, it is the Shia oppressing the Sunni. Until this spiral of oppression and violence against oppression stops, the region will continue to be racked with conflict and chaos. While diplomatic efforts may provide some relief to the sectarian pressure that is building, it will largely be up to the leadership in the region to adopt policies of acceptance for religious minorities.

The situation in the region also has the potential to escalate through conflicting interests by Western nations, such as between the United States and Russia, in addition to state-on-state escalation along sectarian lines. The combination of sectarian rivalry between Iran and Saudi Arabia and their allies, weak and unstable states, humanitarian and refugee crises, and increased militancy create a perfect storm in which small misunderstandings or clashes could quickly intensify into a regional war.⁹⁹

One example of heightened tensions between states was the aforementioned downing of a Russian fighter by Turkey.¹⁰⁰ If such an event were to take place between the United States and Russia, the results could have devastating strategic implications.

The preceding implications of U.S. policy and understanding the Islamic State contribute to setting conditions that could help to prevent escalation to a larger regional war. Preventing escalation is crucial to containment because regional war will provide unprecedented opportunities for the Islamic State to spread its influence, gain additional territory, increase legitimacy, and increase recruiting. The chaos of regional war could also provide additional evidence for the Islamic State to point out that the end of times are surely at hand--further increasing Islamic State opportunities. There can be little doubt that ISIS would welcome and actively instigate any actions that would lead to additional instability and war in the region.

Exercise Strategic Patience

The United States should show restraint and patience in dealing with the Islamic State. As long as the Islamic State is contained, time is on the side of those who oppose them. Decreasing funds, the need for expansion and military conquest, and brutal control of the populace make sustaining the Caliphate an effort that will become more challenging over time. The United States and coalition forces should avoid any strategy that reverses the debilitating combination of containment and time on the Islamic State.

A large U.S. ground invasion plays right into the Islamic State's strategy, increases legitimacy, and provides a rallying cry to bring fresh recruits, funding, and other resources from sympathetic Muslims. In 2006, Al Qaeda in Iraq published the book, *Management of Savagery*, to describe the strategy of using brutality and

spectacular violence to provoke Western nations into ground wars in the Middle East.¹⁰¹

In reference to the movement against the United States, the book cites three goals:

The first goal: Destroy a large part of the respect for America and spread confidence in the souls of Muslims.

The second goal: Replace the human casualties sustained by the renewal movement during the past thirty years by means of the human aid that will probably come for two reasons: (1) Being dazzled by the operations which will be undertaken in opposition to America. (2) Anger over the obvious, direct American interference in the Islamic world.

The third goal: Work to expose the weakness of America's centralized power by pushing it to abandon the media psychological war and the war by proxy until it fights directly.¹⁰²

Those who suggest the United States or other Western nations or a coalition of Western nations should conduct large-scale ground attacks against the Islamic State underestimate the consequences. Such actions would likely increase Islamic State legitimacy, funding, and recruiting, while relieving regional actors from taking greater responsibility for the problem.¹⁰³ Given the nature of the Islamic State, its strengths and opportunities, and its use of religious prophesy, direct intervention on the part of the United States would undermine a containment strategy. Rather than weaken the Islamic State, direct intervention on the part of the United States or other Christian, or Western nations, could actually provide strength to ISIS. Large scale, direct intervention could support containment strategy, as long as it is not conducted by Christian or Western nations.¹⁰⁴

Wars of Ideology

It is nearly impossible to win a war against an ideology. It is wise to counter and undermine the ideology of an enemy, but to make an ideology the enemy does not work. Militaries can kill people, but they cannot kill an idea; killing people in an effort to

kill an idea can cause the ideology to spread and gain strength. The United States declaration of a war against terrorism in 2001 helps make the point--fifteen years later, the United States is no closer to declaring victory against the ideology of terrorism than it was when war was declared. If winning a war on terrorism continues to be an objective, then the United States will always be at war because terrorism will always exist. By fighting an idea rather than an enemy, one can argue that the war on terrorism made the problem worse, diverted U.S. resources away from higher priority concerns, opened a window of opportunity for Iran and Russia to rise, and led to the environment that the Islamic State required to grow and thrive. As the United States, other Western nations, and regional powers contemplate strategies to contain or defeat ISIS, they should focus on defeating the leadership, economics, and fighters of that specific organization while keeping a watchful eye for the rise of other extremist groups coming to power as the Islamic State did from 2010-2014.

Ideologies, once grounded in the culture of a society or religious group, are slow to die. Unfortunately, even if the Islamic State is defeated, the ideology it created will almost certainly survive. The success of the Islamic State's rise to power and unprecedented ability to seize and hold territory and administer the functions of government will likely be duplicated by future organizations with a similar or even the same ideology. In July 2015, the organization, Jaysh Al-Islam, translated "the Army of Islam," captured 18 ISIS fighters in Syria and produced a high tech, high definition video of their simultaneous execution by shotgun blast to the back of the head.¹⁰⁵ The video follows the Islamic State's example of brutal, Hollywood quality videos propagated across the internet to promote their cause, strike fear in their enemies, and establish

legitimacy through a display of power. This type of copycat operation is not likely to be the last based on the example of the Islamic State.

Containment against an ideology is best achieved by countering the ideology while conducting direct and indirect attacks against the enemy using the ideology. Counter-ideology operations conducted via information operations, cyber operations, and economic improvement programs support containment. Physical containment of enemy forces leverage air strikes, attacks on banking and other sources of revenue, with direct intervention conducted by special operations forces and Muslim forces indigenous to the region.

Military Theory

Strategic planners can start to understand the strategy of the Islamic State by studying past military theorists like Sun Tzu, Mao Tse Tung, Kautilya, and even Islamic heroes like Salah Ad-Din. The Islamic State, like military experts in Western Nations, has studied the likes of Sun Tzu and is using the lessons of the past to guide strategy. Understanding the foundations of the Islamic State's military strategy provides insights into how to contain it.

The current U.S. strategy of indirect involvement reflects the viewpoint of Antoine Henri Jomini who lived from 1779-1869 and wrote *The Art of War*. Jomini posited that wars of opinion and, specifically as he put it, "Wars of Islamism and religion," are often the pretext to obtain political power. He believed these wars are the most deplorable because they "enlist the worst passions, and become vindictive, cruel, and terrible."¹⁰⁶

He also said:

...war and aggression are inappropriate measures for arresting an evil which lies wholly in the human passions, excited in a temporary paroxysm, of less duration as it is the more violent. Time is the true remedy for all

bad passions and for all anarchical doctrines...To attempt to restrain such a mob by a foreign force is to attempt to restrain the explosion of a mine when the powder has already ignited: it is far better to await the explosion and afterward fill up the crater than to try to prevent it and to perish in the attempt.¹⁰⁷

Here, Jomini suggests the best way to deal with the evils of human passions and anarchical doctrines is to allow them to burn themselves out and lose their energy.

Then, when in a weakened state, move in to control the insurrection. Taken in modern terms, it would mean contain the Islamic State and allow it to expend its human, monetary, and military resources. Then, under favorable conditions, change the strategy to one of defeat.

Countering SWOT

A common way of confronting an adversary is to consider its strengths, weaknesses, opportunities, and threats and then seek to counter each one. If coalition forces recognize strengths in an adversary, they seek to weaken them. If weaknesses, they seek to exploit them. If opportunities, they seek to block them. If threats, they seek to pursue them. The SWOT is just one form of analysis, but any analysis can be instructive. The most common form of analysis used by U.S. military forces is Center of Gravity Analysis--an analytical model to identify the primary source of strength and the supporting critical capabilities, critical requirements, and critical vulnerabilities of both friendly and enemy forces.¹⁰⁸ Regardless of the analysis technique, the basis for understanding the information used in the analysis should be derived from the deeper social, religious, and cultural understanding of the Islamic State. For example, rather than seeing the Islamic State as a violent extremist organization that seeks to destabilize the United States, the Islamic State should be analyzed as a Salafi Muslim organization with an apocalyptic religious ideology.

Political Constraints and Will of the People

The effects of exhaustion and frustration with multiple failed policies in the MENA can affect options that Western democracies may otherwise consider. Failed interventions in Iraq and Syria, lack of intervention during the Arab Spring, instability and chaos have caused Western support for involvement in the Middle East to diminish and have deepened divisions in the United Nations with regard to solving the problem.¹⁰⁹ While this may slow Islamic State defeat, it may have the positive effect of preventing the United States or other Western countries from committing significant numbers of ground troops to combat ISIS. As previously discussed, a large-scale attack by Western nations would work to ISIS' advantage and directly support its strategy.

Unfortunately, a major successful attack against the United States, France, or the United Kingdom resulting in substantial infrastructure damage and the loss of hundreds or thousands of lives could significantly increase political and public support for direct military action against ISIS. As Western nations continue to resist direct involvement in support of a successful containment strategy, the odds of ISIS shifting focus from regional targets to international ones will likely increase, resulting in more frequent and more violent attacks inside Western countries. Attacks in Paris in November 2015 and Brussels in March 2016 may be examples the Islamic State's provocation efforts. In this case, Western nations would be wise to exercise great restraint and patience.

Waning U.S. influence and interests in the region is a strategic issue affecting the entire region in the mid to long term. Failed U.S. policies in the region have contributed to the instability that created conditions necessary for extremist organizations to thrive, the Arab Spring to occur, and the Assad regime in Syria to remain in power. Multiple attempts at different types of diplomacy, economic policy, and military action in the

region have not only failed to create stability but have also created additional instability. Direct, preemptive intervention in Iraq proved to be costly and ineffective. Leading from behind during the Arab Spring allowed chaos to thrive. Deterrence and indirect support in the Syrian Civil War did nothing to prevent Assad from gassing his own people or stemming the fighting and refugee crisis there. U.S. policy in the region is bounded by the will of the American people, which is in decline. U.S. efforts in the region and economic problems at home result in degraded resolve to continue to investing blood and treasure.¹¹⁰ Amplifying the shift of popular support is the “Shale Revolution” that could lead to complete energy independence for the United States by the year 2035.¹¹¹ Energy independence leaves U.S. citizens wondering why the region is a vital interest. These changing dynamics point toward a potential reevaluation of U.S. interests in the region and, subsequently, its policies including how best to deal with the Islamic State.

The political realities of the will of the people of the United States point to containment strategy. Other strategies short of containment would not achieve the strategic end states of security internationally and at home, or economic and political stability in the region. Strategies more aggressive than containment do not reflect the political realities of the American people and would work to the advantage of the Islamic State. With a deep understanding of the Islamic State, and a generally agreed upon strategy to solve the problem, the United States and coalition partners can move forward with deliberation and cooperation to contain ISIS while it consumes its resources, loses territory, and undermines its own ideological religious prophesy. While it is possible this could lead to ISIS’ self-defeat, it could also provide the conditions for coalition nations to defeat ISIS on their own initiative and under favorable conditions.

Conclusion

The Islamic State is unlike any religious or terrorist group predecessor. It is more violent, has captured more territory, mastered more propaganda, and been more successful than any other violent extremist organization in modern history.

Unfortunately, the startling victory of the Islamic State will have lasting impacts.

Regardless of whether or not the Islamic State is ultimately defeated or successfully contained, there will almost certainly be future terrorist organizations that follow the same brutal and seemingly successful model. To develop an effective strategy for containing ISIS, the United States and its allies must have a more thorough, deeper understanding of the operating environment of the Islamic State. The resulting containment strategy should be designed prevent the Islamic State from future success and dissuade other organizations from using the same approach. The solution will need to be a careful balance of Western support and regional direct intervention that walks the tight rope of sectarian tensions and addresses the underlying conditions that have led to the fragile states, chaos, and civil wars that have allowed the Islamic State to thrive.

Endnotes

¹ Thomas S. Fisher, *The Planner Handbook* (Tampa, FL: Military Strategist, LLC, 2014), 59.

² "The Capture of Mosul: Terror's New Headquarters," *The Economist Online*, June 14, 2014, <http://www.economist.com/news/leaders/21604160-iraqs-second-city-has-fallen-group-wants-create-state-which-wage-jihad> (accessed March 5, 2016).

³ William McCants, *The ISIS Apocalypse: The History, Strategy, and Doomsday Vision of The Islamic State* (New York: St. Martin's Press, 2015), 122.

⁴ United Nations Human Rights Council, *Rule of Terror: Living under ISIS in Syria*, Report of the Independent International Commission of Inquiry on the Syrian Arab Republic (New York: United Nations, November 19, 2014), 6,

http://www.ohchr.org/Documents/HRBodies/HRCouncil/CoISyria/HRC_CRP_ISIS_14Nov2014.doc (accessed March 5, 2016).

⁵ Ibid., 3.

⁶ David Remnick, "Going the Distance - On and Off the Road with Barack Obama," *The New Yorker Online*, January 24, 2014, <http://www.newyorker.com/magazine/2014/01/27/going-the-distance-david-remnick> (accessed January 26, 2016).

⁷ Elias Groll and Simon Engler, "Propaganda Watch: Fearmongering the Threat Posed by the Islamic State," *Foreign Policy Online*, September 15, 2014, <http://foreignpolicy.com/2014/09/15/propaganda-watch-fearmongering-the-threat-posed-by-the-islamic-state/> (accessed January 26, 2016).

⁸ U.S. Joint Chiefs of Staff, *Joint Intelligence*, Joint Publication 2-01 (Washington, DC: U.S. Joint Chiefs of Staff, October 22, 2013), II-1,2.

⁹ U.S. Joint Chiefs of Staff, *Joint Operations*, Joint Publication 5-0 (Washington, DC: U.S. Joint Chiefs of Staff, August 11, 2011), III-1.

¹⁰ Ibid., III-2.

¹¹ Ibid., III-6.

¹² Edgar H. Schein, *Organizational Culture and Leadership*, 3rd ed. (San Francisco, CA: Jossey-Bass, 2004), 26.

¹³ Ibid.

¹⁴ Ibid., 27.

¹⁵ Alastaire Crook, "You Can't Understand ISIS If You Don't Know the History of Wahhabism in Saudi Arabia," *The Huffington Post*, August 27, 2014, http://www.huffingtonpost.com/alastair-crooke/isis-wahhabism-saudi-arabia_b_5717157.html (accessed March 14, 2016).

¹⁶ William McCants, "The Believer – How an Introvert With a Passion for Religion and Soccer Became Abu Bakr Al-Baghdadi Leader of the Islamic State," September 1, 2015, <http://www.brookings.edu/research/essays/2015/thebeliever?> (accessed March 14, 2016).

¹⁷ Jay Sekulow, *Rise Of ISIS – A Threat We Can't Ignore* (New York: Howard Books, 2014), 20.

¹⁸ John Hendren, "'Sunni Awakening': Insurgents are Now Allies," *ABC News*, December 23, 2007, <http://abcnews.go.com/International/story?id=4045471> (accessed March 8, 2016).

¹⁹ McCants, *The ISIS Apocalypse*, 79.

²⁰ Ibid., 80.

²¹ Ibid.

²² Ibid.

²³ Charles Lister, *Profiling the Islamic State* (Washington, DC: The Brookings Institution, November 2014), 12.

²⁴ Ibid., 14.

²⁵ Ibid.

²⁶ McCants, *The ISIS Apocalypse*, 155.

²⁷ Lister, *Profiling the Islamic State*, 22-23.

²⁸ Ed Payne and Salma Abdelaziz, "Muslim Nations Form Coalition to Fight Terror, cCall Islamic Extremism 'Disease'," *CNN*, December 22, 2015, <http://www.cnn.com/2015/12/14/middleeast/islamic-coalition-isis-saudi-arabia/> (accessed March 9, 2016).

²⁹ Alice Guthrie, "Decoding the Islamic State: Why is the New Name for ISIS so Hard to Understand?" September 2, 2015, <https://www.freewordcentre.com/blog/2015/02/the-Islamic-State-isis-media-alice-guthrie/> (accessed January 27, 2016).

³⁰ McCants, *The ISIS Apocalypse*, 134-135.

³¹ Ibid., 53.

³² Ibid., 69.

³³ "Foreign Fighters: An Updated Assessment of the Flow of Foreign Fighters into Syria and Iraq," *The Soufan Group*, December 2015, www.soufangroup.com/wp.../TSG_ForeignFightersUpdate3.pdf (accessed March 24, 2016).

³⁴ Sebastian L. Gorka and Katharine C. Gorka, *ISIS: The Threat to the United States* (McClean, VA: Threat Knowledge Group, November 2015), 2.

³⁵ Graeme Wood, "What ISIS Really Wants," *The Atlantic*, March 2015, <http://www.theatlantic.com/magazine/archive/2015/03/what-isis-really-wants/384980/> (accessed January 27, 2016).

³⁶ Peiter Vanostaeyen, "Audio Message by Abu Bakr al-Baghdadi – Even if the Disbelievers Despise Such," November 14, 2015, <https://pietervanostaeyen.wordpress.com/2014/11/14/audio-message-by-abu-bakr-al-baghdadi-even-if-the-disbelievers-despise-such/> (accessed March 12, 2016).

³⁷ Sekulow, *Rise of ISIS*, 28.

³⁸ "The ISIS Map of the World: Militants Outline Chilling Five-Year Plan for Global Domination as they Declare Formation of Caliphate - and Change their Name to the Islamic State," *Daily Mail*, June 30, 2014, <http://www.dailymail.co.uk/news/article-2674736/ISIS-militants-declare-formation-caliphate-Syria-Iraq-demand-Muslims-world-swear-allegiance.html> (accessed January 30, 2016).

³⁹ Tim Lister, "What Does ISIS Really Want?" *CNN*, December 11, 2015, <http://www.cnn.com/2015/12/11/middleeast/isis-syria-iraq-caliphate/> (accessed February 2, 2016).

⁴⁰ Sheikh Abu Mohammed Al-Adnani Al-Shami, "They shall by no Means Harm you but with a Slight Evil," trans. Fursan Al-Balagh Media (Al-Furqan Media, August 2013), 4, <https://azelin.files.wordpress.com/2013/07/shaykh-abc5ab-mue1b8a5ammad-al-e28098adnc481nc4ab-al-shc481mc4ab-22they-will-not-harm-you-except-for-some-annoyance22-en.pdf> (accessed April 5, 2016).

⁴¹ "Al-Hadith, Analysis and an Overview," <http://www.al-islam.org/articles/al-hadith-analysis-and-overview-hashim> (accessed January 27, 2016).

⁴² United Nations Human Rights Council, *Rule of Terror*, 6.

⁴³ Florence Gaub, "The Cult of ISIS," *Survival, Global Politics and Strategy* 50, no.1 (February-March 2016): 114-115.

⁴⁴ Elizabeth Madsen, Beatrice Daumerie, and Karen Hardee, *The Effects of Age Structure On Development* (Washington, DC: Population Action International, 2010), 2.

⁴⁵ United Nations, *World Population Prospects – Key Findings and Tables* (New York: United Nations, 2015), 33-37.

⁴⁶ Masood Ahmed, "Youth Unemployment in the MENA Region: Determinants and Challenges," in World Economic Forum, *Addressing the 100 Million Youth Challenge- Perspectives on Youth Employment in the Arab World in 2012* (New York: World Economic Forum, June 2012), <https://www.imf.org/external/np/vc/2012/061312.htm> (accessed February 3, 2016).

⁴⁷ Eric Schmitt, "U.S. Intensifies Effort to Blunt ISIS' Message," *The New York Times Online*, February 16, 2015, http://www.nytimes.com/2015/02/17/world/middleeast/us-intensifies-effort-to-blunt-isis-message.html?_r=1 (accessed March 17 2016).

⁴⁸ Jon Greenburg, "Does the Islamic State Post 90,000 Social Media Messages Each Day?" *PolitiFact*, February 19, 2015, <http://www.politifact.com/punditfact/statements/2015/feb/19/hillary-mann-leverett/cnn-expert-islamic-state-posts-90000-social-media/> (accessed March 18, 2016).

⁴⁹ Ibid.

⁵⁰ Gaub, "The Cult of ISIS," 116.

⁵¹ Ibid., 120.

⁵² Ibid., 121.

⁵³ "Isis Rebels Declare 'Islamic State' in Iraq and Syria," *BBC News*, June 30, 2014, <http://www.bbc.com/news/world-middle-east-28082962> (accessed February 4, 2016).

⁵⁴ The History Place, "Hitler Youth – Hitler's Boy Soldiers," <http://www.historyplace.com/worldwar2/hitleryouth/hj-boy-soldiers.htm> (accessed March 20, 2016).

⁵⁵ Ibid.

⁵⁶ Miranda Leitsinger, "Child Soldiers, or 'Cubs,' Shown in Latest ISIS Video," *NBC News*, February 22, 2015, <http://www.nbcnews.com/storyline/isis-terror/child-soldiers-or-cubs-shown-latest-isis-video-n310646>, (accessed March 26, 2016).

⁵⁷ "Islamic State Publishes First Child-Beheader Video," *The Clarion Project*, July 19, 2015, <https://www.clarionproject.org/news/islamic-state-forces-child-carry-out-latest-beheading> (accessed March 26, 2016).

⁵⁸ Ibid.

⁵⁹ Morgan Windsor, "ISIS Beheads Cigarette Smokers: Islamic State Deems Smoking 'Slow Suicide' Under Sharia Law," *IBTimes.com*, February 12, 2015, <http://www.ibtimes.com/isis-beheads-cigarette-smokers-islamic-state-deems-smoking-slow-suicide-under-sharia-1815192> (accessed March 23, 2016).

⁶⁰ "Islamic State Militant 'Executes Own Mother' in Raqqa," *BBC News*, January 8, 2016, <http://www.bbc.com/news/world-middle-east-35260475> (accessed February 4, 2016).

⁶¹ United States Human Rights Council, *Rule of Terror*, 7.

⁶² "Foreign Fighters," 6.

⁶³ Ibid.

⁶⁴ Sarah Childress, Chris Amico, and Evan Wexler, "Who Runs the Islamic State?" *PBS*, October 28, 2014, <http://www.pbs.org/wgbh/frontline/article/who-runs-the-islamic-state/> (accessed February 4, 2016).

⁶⁵ Nicholas Watt, "Tony Blair Makes Qualified Apology for Iraq War Ahead of Chilcot Report," *The Guardian*, October 25, 2015, <http://www.theguardian.com/uk-news/2015/oct/25/tony-blair-sorry-iraq-war-mistakes-admits-conflict-role-in-rise-of-isis> (accessed March 9, 2016).

⁶⁶ Isabell Coles and Ned Parker, "The Baathists: How Saddam's Men Help Islamic State Rule," *Reuters Investigates*, December 11, 2015, <http://www.reuters.com/investigates/special-report/mideast-crisis-iraq-islamicstate/> (accessed March 25, 2016).

⁶⁷ Ibid.

⁶⁸ Aaron Miller, "The Arab Spring in 2015: RIP?" *The Wall Street Journal Online*, blog posted January 2, 2015, <http://blogs.wsj.com/washwire/2015/01/02/the-arab-spring-in-2015-rip/> (accessed February 5, 2016).

⁶⁹ "Syria: The Story of the Conflict," *BBC News*, February 3, 2016, <http://www.bbc.com/news/world-middle-east-26116868> (accessed February 6, 2016).

⁷⁰ “Who Is Fighting Whom in Syria,” *New York Times Online*, September 30, 2015, http://www.nytimes.com/2015/10/01/world/middleeast/the-syria-conflicts-overlapping-agendas-and-competing-visions.html?_r=0 (accessed February 6, 2016).

⁷¹ Catherine E. Shoichet and Mariano Castillo, “Saudi Arabia-Iran Row Spreads to Other Nations,” *CNN*, January 4, 2016, <http://www.cnn.com/2016/01/04/middleeast/saudi-arabia-iran-severing-ties-whats-next/> (accessed February 4, 2016).

⁷² Ibid.

⁷³ U.S. Joint Chiefs of Staff, *Joint Operations*, III-28.

⁷⁴ McCants, *The ISIS Apocalypse*, 81.

⁷⁵ Wood, “What ISIS Really Wants.”

⁷⁶ Joshua Meservey, “Why ISIS Is Hunting Down and Killing Journalists,” *Newsweek.com*, November 3, 2015, <http://www.newsweek.com/why-isis-hunting-down-and-killing-journalists-392905> (accessed March 25, 2016).

⁷⁷ Council on Foreign Relations, “The Shia-Sunni Divide – A CFR InfoGuide Presentation,” February 2016, http://www.cfr.org/peace-conflict-and-human-rights/sunni-shia-divide/p33176#/?cid=otr-marketing_url-sunni_shia_infoguide (accessed February 8, 2016).

⁷⁸ “Know Your Enemy: Who Were The Safawiyyah?” *Dabiq*, no. 13, 10-12.

⁷⁹ “Sectarian Tensions in Middle East Deepen as Saudi Arabian Allies Join Rift With Iran,” *The Wall Street Journal Online*, January 4, 2016, <http://www.wsj.com/articles/bahrain-severs-diplomatic-ties-with-iran-1451908884> (accessed February 8, 2016).

⁸⁰ Ibid.

⁸¹ “The Islamic State's (ISIS, ISIL) Magazine,” *The Clarion Project*, September 10, 2014, <https://www.clarionproject.org/news/islamic-state-isis-isil-propaganda-magazine-dabiq> (accessed March 25, 2016).

⁸² Shuhada is a complicated word in Arabic. Many associate it with the English word, martyr, but it has a wider cultural meaning in Arabic that suggests it is a Muslim who best exemplifies the Islamic spirit under situations of great risk or duress. *Dabiq* magazine states in Issue 13 that “The best Shuhada are those who fight in the front ranks. They do not turn their faces aside until they are killed.” More on the complicated meaning of Shuhada can be found in an article by Mlynx Qualey, “Do You Translate *شهداء* as Martyrs?,” *Arabic Literature (in English)*, February 17, 2012, <http://arablit.org/2012/02/17/do-you-translate-%D8%B4%D9%87%D8%AF%D8%A7%D8%A1-as-martyrs/> (accessed March 18, 2016).

⁸³ “The Islamic State’s Magazine.”

⁸⁴ Christopher Bolan, “The Rise of ISIS,” January 26, 2016, *U.S. Army War College YouTube Channel*, video file, <https://www.youtube.com/watch?v=0NQUUYkfwV0&feature=youtu.be> (accessed January 29, 2016).

⁸⁵ Hugh Naylor, "Islamic State is no Longer so Formidable on the Battlefield," *Washington Post Online*, February 6, 2016, https://www.washingtonpost.com/world/middle-east/islamic-state-is-no-longer-so-formidable-on-the-battlefield/2016/02/06/26d6c8e4-c6a7-11e5-b933-31c93021392a_story.html (accessed February 10, 2016).

⁸⁶ Ibid.

⁸⁷ McCants, *The ISIS Apocalypse*, 142.

⁸⁸ Ian Fisher, "In Rise of ISIS, No Single Missed Key but Many Strands of Blame," *New York Times Online*, November 18, 2015, http://www.nytimes.com/2015/11/19/world/middleeast/in-rise-of-isis-no-single-missed-key-but-many-strands-of-blame.html?_r=0 (accessed February 7, 2016).

⁸⁹ Patrick Goodenough, "Top Sunni Body Urges All Islamic States to Join New Saudi-Led Anti-Terror 'Military Alliance'," *CNS News*, December 17, 2015, <http://www.cnsnews.com/news/article/patrick-goodenough/top-sunni-body-urges-all-islamic-states-join-new-saudi-led-anti-0> (accessed February 9, 2016).

⁹⁰ Ibid.

⁹¹ Ibid.

⁹² "Foreign Fighters," 7.

⁹³ Naylor, "Islamic State is no Longer so Formidable."

⁹⁴ McCants, *The ISIS Apocalypse*, 54.

⁹⁵ The Marshall Plan of 1945 was developed by then Secretary of State George C. Marshall along with some of the best economic and political thinkers of the time. The plan sought to rebuild the spirit of the people of Western Europe while achieving political stability through economic revitalization. Sixteen European nations participated in the program administered by the United States. European nations received \$13 Billion in aid, which allowed them to invest in infrastructure and build strong trade relationships with their neighbors and the United States. The plan began in 1945 and lasted until 1951. For more on the Marshall Plan, see <http://marshallfoundation.org/marshall/the-marshall-plan/>.

⁹⁶ The George C. Marshall Foundation, "History of the Marshall Plan," <http://marshallfoundation.org/marshall/the-marshall-plan/history-marshall-plan/> (accessed March 26, 2016).

⁹⁷ Shein, *Organizational Culture and Leadership*, 26. This figure that depicts Shein's cultural model was updated by the author to include terms and influences that better reflect the specific ISIS operational environment.

⁹⁸ Larry Goodson, "Syria and the Great Middle Eastern War," July 8, 2014, <http://www.strategicstudiesinstitute.army.mil/index.cfm/articles//Syria-and-the-Great-Middle-Eastern-War/2014/07/8> (accessed March 25, 2016).

⁹⁹ Council on Foreign Relations, "The Shia-Sunni Divide."

¹⁰⁰ Catherine E. Shoichet and Mariano Castillo, “Saudi Arabia-Iran Row Spreads to Other Nations.”

¹⁰¹ Abu Bakr Naji, *The Management of Savagery*, trans. William McCants (Cambridge, MA: John M. Olin Institute for Strategic Studies at Harvard University, May 23, 2006), 25.

¹⁰² *Ibid.*, 24-25.

¹⁰³ Loren Thompson, “Killing ISIS: Five Reasons American 'Boots on the Ground' Will Backfire,” *Forbes.com*, November 20, 2015, <http://www.forbes.com/sites/lorenthompson/2015/11/20/killing-isis-five-reasons-american-boots-on-the-ground-will-backfire/#f82bed72cd36> (accessed March 25, 2016).

¹⁰⁴ One area of precaution in providing air support and arms to Muslim forces fighting ISIS is to ensure it is a balanced approach that does not have the appearance of favoring or strengthening either major sect of Islam – Sunni or Shia.

¹⁰⁵ In an interesting act of symbolism, the ISIS fighters were dressed from head to toe in black, while the executioners from Jaysh Al-Islam wore orange jumpsuits. This contrast of ISIS’ practice of wearing all black and executing victims wearing orange jumpsuits was undoubtedly intentional and meant to express the retaliatory nature of the execution.

¹⁰⁶ Baron De Jomini, *The Art of War*, trans. G.H. Mendell and W.P. Craighill (Radford, VA: Wilder Publications, LLC, 2008), 25.

¹⁰⁷ *Ibid.*

¹⁰⁸ U.S. Joint Chiefs of Staff, *Joint Operations*, III-25.

¹⁰⁹ Fergal Keane, “International System Has Failed Syria,” *BBC News*, December 21, 2015, <http://www.bbc.com/news/world-35150037> (accessed February 9, 2016).

¹¹⁰ This was seen in the inaction after Syria crossed the chemical weapons “red line,” the fact that the U.S. watched the Arab Spring from the sidelines, and its unwillingness to commit significant numbers of ground troops to the region to combat and defeat ISIS.

¹¹¹ Richard Anderson, “How American Energy Independence Could Change the World,” *BBC News*, April 3, 2014, <http://www.bbc.com/news/business-23151813> (accessed February 1, 2016).