'THE AXIS OF RESISTANCE': THE ROLE OF RELIGION IN IRANIAN FOREIGN POLICY
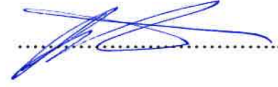
by

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'THE AXIS OF RESISTANCE': THE ROLE OF RELIGION
IN IRANIAN FOREIGN POLICY

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ABSTRACT

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Scholarship on Iran's foreign policy has been primarily interested in Iran's nuclear program in the recent years. Rouhani Administration's historic nuclear negotiations with the international community have led many to conclude that Iran pursues an increasingly moderate and pragmatist foreign policy. However, the nuclear rapprochement happened in synchrony with an equally important phenomenon in Iran's foreign policy – Iran's increased engagement with the Shiites in the Middle East. This study examines the 'Axis of Resistance,' a dense Iran-led alliance network of state and non-state actors covering a wide range of Shia mobilization across the Middle East. Why does Iran pursue a foreign policy with distinct religious and ideological contours in the post-2003 Middle East, despite the observed pragmatism and rationalism in relations with the West during the same period? What role does religion play in Iran's 'Axis of Resistance' policy? This study theoretically subscribes to an emerging research program which seeks to merge the study of religion into International Relations. The study first examines the role of religion in Iran's foreign policy by historically tracing transnational politically activist Shiism and its implications on the Islamic Republic after 1979. The following chapter examines Iran's foreign policy in Middle East after 2003 with a focus on Shia mobilization across Iraq and Syria. The last chapter examines the Iranian political elites' discourses on the transformations of the region after 2003. This research is based on multiple qualitative methodologies including field research in Iran, elite interviews, process-tracing, and discourse analysis.

ÖZET

'DİRENİŞ EKSENİ': İRAN'IN DIŞ POLİTİKASINDA DİNİN ROLÜ

EZGİ UZUN

Doktora Tezi, Temmuz 2018

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Anahtar Kelimeler: Din ve Uluslararası İlişkiler, İran'ın Dış Politikası, Direniş Ekseni, Uluslar Ötesi Şii Siyaset, İdeolojik Ordular

Son yıllarda İran'ın dış politikası üzerine yapılan çalışmalar çoğunlukla İran'ın nükleer programına odaklanmıştır. Hasan Ruhani hükümetinin uluslararası camia ile vardığı tarihi nükleer uzlaşma, İran rejiminin gitgide daha ılımlı ve pragmatist bir dış politikaya doğru evrildiği yönünde genel bir kanıya yol açmıştır. Öte yandan, İran'ın nükleer müzakereleri, eşit derecede öneme sahip başka bir dış politika olgusuyla eş zamanlı olarak gerçekleşmektedir: İran'ın Ortadoğu'daki Şiilerle giderek artan ilişkileri. Bu çalışma, Ortadoğu'da geniş bir yelpazede seyreden Şii hareketliliğini kapsayan, İran'ın başını çektiği, devlet ile devlet dışı pek çok aktörden oluşan ve 'Direniş Ekseni' adı verilen yoğun ittifak ağını incelemektedir. İran, aynı dönemde Batı ile ilişkilerinde gözlemlenen pragmatizm ve rasyonalizm yönelimine rağmen, neden 2003 sonrası dönemde Ortadoğu'da belirgin bir dini ve ideolojik dış politika izlemektedir? Din, İran'ın 'Direniş Ekseni' politikasında nasıl bir rol oynamaktadır? Bu çalışma, din olgusunu Uluslararası İlişkiler literatürüne entegre eden ve son dönemde yükselmekte olan bir araştırma programına kuramsal katkıda bulunmayı amaçlamıştır. Çalışma ilk olarak ulus ötesi Şii siyasi hareketler ile bunun 1979 sonrası İran İslam Cumhuriyeti üzerindeki etkilerinin tarihsel bir izlemesini yaparak dinin İran'ın dış politikasındaki rolünü incelemektedir. Tezin bir sonraki bölümü Irak ve Suriye'deki Şii hareketlere odaklanarak İran'ın 2003 sonrası Ortadoğu politikasını ele almaktadır. Çalışmanın son bölümü ise İran siyasi elitlerinin 2003 sonrası dönemde Ortadoğu'daki dönüşümlere ilişkin söylemlerini incelemektedir. Bu araştırma, İran'da gerçekleştirilen saha çalışmaları, elitlerle yapılan mülakatlar, süreç izleme ve söylem analizi gibi birden fazla ve çeşitli nitel araştırma metoduna dayanmaktadır.

ACKNOWLEDGEMENTS

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CSR: Center for Strategic Research

IR: International Relations

IRGC: Islamic Revolutionary Guard Corps

ISCI: Islamic Supreme Council of Iraq

ISIL: Islamic State in Levant

JCPOA: Joint Comprehensive Plan of Action

NDF: National Defense Forces

PMF: Popular Mobilization Forces

SCIRI: Supreme Council of the Islamic Revolution in Iraq

USA: The United States of America

PERSIAN AND ARABIC GLOSSARY

Akhbari School: A theological and legal perspective that places the Quran and the Prophet's traditions as the only sources of Islamic law

Artesh: The regular standing army of the Islamic Republic of Iran

Ashura: A major religious commemoration by Shia communities of Imam Hossein's martyrdom during the Battle of Karbala

Basij: Literally 'Popular Mobilization Forces' of the Islamic Republic of Iran

Battle of Karbala: A military engagement between Imam Hossein, the son of Ali and grandson of Prophet Mohammad, and Umayyad Dynasty for religious leadership in the 7th century AD

Bidar-e Eslami: Literally 'Islamic Awakening

Bonyad: Tax-exempt and predominantly religious and revolutionary charitable foundations in Iran with considerable economic powers

Defa az Herem: Literally 'Defense of the Holy Shrines'

Defa-e Moqaddas: literally 'Holy Defense War,' which refers to Iran-Iraq War of 1980-88

Estekbar: Literally 'arrogance' in Khomeini's terminology, which refers to colonialist and imperialist powers

Fatwa: A religious calling by the authorized *ulama*

Gaybet: Occultation of the Twelfth Imam during the 10th century AD, accompanied by a messianic belief among Shias that he will return to restore peace and justice in the world

Gharbzadegi: Jalal al-Ahmad's word coinage literally meaning 'Westoxication,' which means a socio-economic and intellectual dependence upon the West at the expense of the intoxication of Islamic society, values, traditions, and culture

Hashd al-Shaabi: Literally 'Popular Mobilization Forces,' a paramilitary organization comprising various Shia, and to a lesser extent non-Shia militias for fighting against ISIL in Iraq

Hawza: Seminary centers where Shia scholars are trained

Ijtihad:	A principle and practice in Islamic jurisprudence which highlights the Muslim jurist' individual reasoning as another source of Islamic Law in addition to Quran and traditions of the Prophet
Imam Hossein:	The son of Ali and grandson of Prophet Mohammad, and the third Shia Imam who was martyred during the Battle of Karbala
Imam Mahdi:	The Twelfth Imam of Shias who is currently in occultation and is believed to return from *gayb* to bring salvation to believers
Imamate:	Leadership of the Islamic community by *Imams*, the descendants of Prophet Mohammad, who are believed to have the right to rule according to Twelver Imamate Shia faith
Jaysh al-Shaabi:	Also known as 'National Defense Units,' an institutional body that brought together Syria's predominantly Alawite and to a lesser extent non-Alawite pro-regime militias together in the fight against opposition forces in Syria
Jihad:	Literally 'struggle' for the well-being of Islam
Majlis:	Parliament
Marja-e taqlid:	The source of emulation and a religious reference to be followed by Shiite communities who needed the guidance of a high jurist to lead their lives according to true Islamic faith in the absence of the Imam and the Prophet
Marja:	The highest religious ranking in Twelver Shia faith of a Shia jurist whose religious edicts are followed by Shias and to whom religious taxes are paid
Mehver-e Moqawamat:	Literally 'Axis of Resistance'
Mostakberoun:	Literally 'the oppressors' in Khomeini's terminology
Mujtahid:	Independent Shia scholars who interpret the Islamic law
Mostezefan:	Literally 'the oppressed' in Khomeini's terminology
Shahid:	Literally a 'martyr'
Shia Islam:	A sect of Islam which observes the teachings of Prophet Mohammad and recognizes the religious leadership of his family and descendants

Terorism-e Takfiri: Literally '*Takfiri* terrorism'

Twelver Imamate Shiism: The largest branch of Shia Islam which adheres to the belief that Twelve *Imams*, or descendants of Prophet Mohammad, are the rightful religious and political authorities to lead the Islamic *Ummah*

Ulama: A body of Muslim scholars with a knowledge of Islamic jurisdiction and theology

Ummah: The Muslim community

Usuli School: A Shiite school of jurisprudence which gives primacy to Interpretation of the Islamic law by Shia clerics in addition to Quran and the traditions of the prophet

Velayet-e faqih: Literally 'the guardianship of the jurist' in state affairs and is expounded by Ayatollah Khomeini

'It was a privilege to be present at the awakening of the Orient. It was a moment of intense emotion, enthusiasm and doubt. What ideas, both brilliant and monstrous, had been able to sprout in its sleeping brain? What would it do as it woke up? Was it going to pounce those who had shaken it?'

Amin Maalouf, Samarkand

CHAPTER 1

INTRODUCTION

1.1.Introduction

On the curvy hills of Park Taleghani spanning next to Modarres Expressway of Tehran rises the tallest flagpole of Iran. The location of this sign of Persian nationalism is not arbitrary. The rising colors of green, red, and white, along with the emblem of Islamic Republic at the center are easily discernable from one of the most crowded highways and the most frequently visited public places adjacent to it. What is not quite discernable from outside though is that the flagpole oversees a large museum complex covering an 18-hectare space. Given the copious number of Qajar and Pahlavi palaces, historical museums, and art galleries, this museum is neither Tehran's most famous cultural spot nor its most recommended touristic attraction. Nevertheless, the museum is undoubtedly one of the most important spots for the curious students of Iranian military and security culture, as it presents the most important era of the Islamic Republic: The Holy Defense. Officially named 'The Holy Defense Museum and the Promotion of Resistance Culture,' this museum is an Iranian war museum, established in 2009 and is run by Iran's Islamic Revolutionary Guard Corps.

The Holy Defense (*defa-e moqaddas* in Persian) refers to Iran's 8-year-long war with Iraq. What non-Iranian social science scholars call '1980-88 Iran-Iraq War,' this war is covered by several terms with religious and revolutionary undertones in the Iranian political discourse, with the most frequently used of them being 'holy defense war,' 'sacred defense' and 'imposed war.' The prolonged war with Iraq maintains a significant

place in the psyche of the Islamic Republic. The war came upon the Islamic Republic in its early years, when the Islamic state system was most vulnerable due to ongoing political struggles inside the regime. Efforts to establish new state institutions matching the ideology, functions of the revolutionary Islamic regime, as well as the reconstruction of a nearly non-existent army, which was almost dissolved after the Revolution due to its ties to the Pahlavi regime, all contributed to the Republic's vulnerability. On one hand, seizing on the revolutionary regime under most unfavorable conditions, the war inflicted huge human and material losses on the side of the Islamic Republic for 8 years, gaining a place in its history. On the other hand, the war also served to empower the institutional and ideological composition of the Islamic regime internally by reiterating its anti-imperialistic and revolutionary ideology, developing new models of popular mobilization at all levels of society, and finally by paving the way for the construction and further institutionalization of an ideological, volunteer-based, and popular security actor – the Islamic Revolutionary Guard Corps. The 8-year-long defense against Iraq as well as its allies is thus a total resistance against the attempts of the opponents to wipe out the new revolutionary ideology and system in its infancy. The Holy Defense Museum is thus a tribute to those key revolutionaries, veterans, and martyrs who sacrificed themselves for the defense of the new Islamic regime and its ideology.

The content of the museum is roughly divided into three main themes: the revolution, the war, and martyrdom. Passing through a corridor of real-size representations of revolutionary personalities, the visitor enters the first hall of the revolution, where a large collection of photos, videos, multimedia, documents, and maps are displayed to inform the visitor on the events leading up to the revolution and its immediate aftermath. After savoring the large collection of information in the previous hall, the visitor walks through a realistic display of war scenes with technologically innovative and compelling representations of war-struck cities, classrooms, and factories accompanied by a morbid sound of tanks, bullets, and aircrafts in the background. The visitor then meets the heroes of the war in the following hall – the Hall of Martyrs. This is the tribute hall for war veterans and martyrs, which conveys the story of their sacrifices during the war with an artistic display of their life stories, personal belongings, and letters. There is a non-random sequence in the arrangement of the whole display and it becomes most evident when the Hall of Martyrs end up at 'the Hall of Ashura,' a generously decorated shrine room hosting a representation of the shrine of the first Shiite martyr of

the historic battle of Karbala – the shrine of Imam Hossein. The museum is no longer a museum now – rather being a shrine, the shrine of the Martyr of martyrs, a religious narrative captivating the visitor at his very emotions and faith. As such, one cannot avoid hearing the message of the whole display of Ashura proceeding the hall of the martyrs: Iranian soldiers' sacrifice during the 8-year-long war against Saddam regime, as well as 'the arrogant, oppressive, imperialistic Western powers' and their Arab allies is nothing more than the continuation of Imam Hossein's movement against the 'oppressive' Umayyad regime in the 7th century AD. Sacrifice, martyrdom, and resistance to oppressive rulers is the backbone of Shia faith narrative that originated in the Battle of Karbala and later fed the ideological and mobilizational components of Shia political activism of the 20th century including that of Islamic Republic's revolutionary cleric – Ayatollah Khomeini. The message of martyrdom and sacrifice in the Hall of Ashura re-connects with the sacrifices of the 20th century political activism at the so-called Martyrdom Bridge proceeding it, where the visitor is exposed to the flashing names of Holy War martyrs reflected visually on both sides of the bridge.

The visitor expects the museum to conclude with the informative display of the ceasefire and the subsequent agreements signed by both countries setting the terms of peace. However, the ceasefire with Iraq neither means the end of the holy struggle with Iraq, nor is the end of the war a source of pride for Iranians. The real source of pride for Iran is their resistance in defending the revolutionary Islamic regime for 8 years, ensuring its survival, and subsequently reconstructing the war-torn country despite strict isolationism and material hardships it felt after 1979. Therefore, upon reaching the last hall of the museum called the Hall of Victory, the visitor encounters a series of large-framed uncensored photographs showing the hanging of Iraq's overthrown leader Saddam Hossein and his fateful defeat in the hands of his superpower patron after the 2003 invasion. The memory of war, hardship, sacrifice, endurance and the final victory is thus carried over as the official end of the war. Finally, right across the exit of the museum, the visitor enters a mosque modelled real-size after the Jame Mosque of Khorramshahr, a mosque in the port city of Khorramshahr on the western war front which became the hotspot of volunteer mobilization during the war. The mosque becomes the symbol of Islamic resistance at this point, where ordinary people mobilized themselves in defense of the Islamic Republic within the realities of institutional and military shortcomings. The mosque is thus another symbol for the timelessness of the resistance:

where there is the mosque, or where there is Islam, there is the resistance. Moreover, the mosque is also the symbol of the nation's victory: where there is the mosque, there is the willpower and perseverance for a divinely-ordained, albeit late coming, victory.[1]

The Holy Defense Museum can be read as a microcosm of the military and security culture of the Islamic Republic. The military and security culture whose seeds were sown during the 8-year-long war subsequently transcended the war and informed the foreign policy calculations and tools of the Islamic Republic in the later decades. The war might be over, yet its lessons and experience, the experience of 'the Islamic resistance' is there. The second half of the museum's name is quite telling in this respect: 'The Promotion of Resistance Culture.' Surprisingly, very few sources exist on 'Iranian resistance' for a curious reader outside of Iran and the concept is quite unknown to the students of Iranian politics unless they are interested in the security culture of Iran.[2] As a revolutionary regime with a deep-rooted ideological and intellectual background, the Islamic Republic is well-known for its creativity in devising novel political terminology that matches to its political ideology. The Islamic Republic's ideology can be summarized as a careful and innovative blend of anti-imperialism, anti-liberal modernism, Third-Worldism, Shiism, and revolutionary Islamism. 'Resistance' has always been a central concept to the state ideology and is used by Iran's Supreme Leader Ayatollah Khamenei predominantly to refer to the resistance against what he calls the 'arrogant powers,' i.e. the Western imperialism headed by the USA. Accordingly, resistance in its original meaning is against the infiltration of the liberal socio-political system, capitalism, materialism, and secularism into the Iranian socio-political system through the dynamics of globalization, foreign intervention, and expansionist American policies. In this respect, the Islamic Revolution is recognized as the first manifestation of 'resistance' fought against the Shah regime domestically, who presumably gave way to such a political and ideological intervention in Iran during his reign.

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[1] This narrative is based on the author's observations during the field trip to Tehran in August 2015. For detailed information about Holy Defense Museum, see the official webpage 'Main Page: Holy Defense Museum,' Holy Defense Museum, accessed May 21, 2017, http://en.iranhdm.ir.

[2] See Arshin Adib-Moghaddam, *On the Arab Revolts and the Iranian Revolution: Power and Resistance Today* (London: Bloomsbury, 2013); Eric Mohns and Andre Bank, 'Syrian Revolt Fallout: End of the Resistance Axis?' *Middle East Policy* 19, issue 3 (2012): 25-35; Graham E. Fuller, 'The Hizballah-Iran Connection: Model for Sunni Resistance,' *The Washington Quarterly* 30, issue 1 (2007): 139-150.

In foreign policy as well, the 'resistance' is against the penetration of the forces of globalism into Iran's political system, the American presence in the Middle East, and any international attempt to challenge the Islamic Republic through a strict policy of political isolationism and economic sanctions. The 'resistance' is political and economic, and above all, military. The Holy Defense War is thus the first manifestation of the Islamic Republic's military resistance to the international community who provided extensive military and economic assistance to Iraq during the war and politically and militarily isolated Iran by heavy sanctions. Iran learnt to respond to such challenges by 'popular mobilization,' i.e. by devising its own military mobilization system of volunteer recruits who would fight for an all-out defense of the Islamic Republic inside and outside - its territorial integrity, anti-imperialistic revolutionary Islamist ideology, and its very existence. The institutional extension of the popular mobilization is the Islamic Revolutionary Guard Corp (IRGC) and the *Basijis*, i.e. the volunteer-based youth affiliates of the IRGC who are responsible for the defense of the Islamic regime mainly at home, but also abroad when needed. 'Islamic resistance' as such has a comprehensive content, as it is a discourse, a policy behavior, and finally an institution.

The Islamic Republic of Iran has been a topic of scholarly research in Political Science and International Relations for two predominant reasons: the Islamic Revolution of 1979 and its nuclear program. Scholars on Iran have shifted their attention to the latter since 2002, when two secret nuclear sites were discovered by the international community.[3] A high number of research has been generated on the causes of Iran's nuclearization and its possible implications on regional and international politics.[4] The nuclear stalemate between Iran and the international community temporally coincided with three

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[3] See 'Timeline: Iran Nuclear Crisis: Chronology of Key Events Since 2002,' *BBC*, last modified September 24, 2005, http://news.bbc.co.uk/2/hi/middle_east/4134614.stm.

[4] For a selected list of works on Iran's nuclear program, see Kenneth Waltz, 'Why Iran Should Get the Bomb: Nuclear Balancing Would Mean Stability,' *Foreign Affairs* 91, no. 4 (2012): p. 2-5; Mustafa Kibaroglu, 'Good for the Shah, Banned for the Mullahs: The West and Iran's Quest for Nuclear Power,' *The Middle East Journal* 60, no 2 (2006): p. 207-232; Mustafa Kibaroğlu, 'Iran's Nuclear Ambitions from a Historical Perspective and the Attitude of the West,' *Middle East Studies* 43, no. 2 (2007): p. 223-245; Etel Solingen, *Nuclear Logics: Contrasting Paths in East Asia and the Middle East* (New Jersey: Princeton University Press, 2007); Jahangir Amuzegar, 'Nuclear Iran: Perils and Prospects,' *Middle East Policy* 8 (Summer 2006): p. 90–112; Anthony H. Cordesman, 'Iran and the United States: The Nuclear Issue,' *Middle East Policy* 15 (Spring 2008): p. 19–29; Nihat Ali Özcan and Özgür Özdamar, 'Iran's Nuclear Program and The Future of U.S.-Iranian Relations,' *Middle East Policy* 16 (Spring 2009): p. 121–133; Chris Quillen, 'Iranian Nuclear Weapons Policy: Past, Present and Future,' *Middle East Review of International Affairs* 6 (June 2002): p. 17–24; Ray Takeyh, 'Iran's Nuclear Calculations,' *World Policy Journal* 20 (June 22, 2003): p. 21-28; Arzu Celalifer Ekinci, *İran Nükleer Krizi* (Ankara: USAK 2009).

presidencies in Iran: Mohammad Khatami's reformist rule, the hardliners' rule under Mahmoud Ahmadinejad, and finally the rule of the pragmatist leader Hassan Rouhani. The repeated shifts in the nuclear negotiations between confrontation and moderation reflected these very leadership dynamics and the general course of Iranian foreign policy in each period. In line with this, when this research started in 2014, the Islamic Republic appeared to be following a very pragmatist path towards moderation and integration with the international community under the pragmatist Hassan Rouhani's presidency. The former nuclear negotiator and pragmatist politician Hassan Rouhani had won a landslide victory over his hardliner predecessor Mahmoud Ahmadinejad in the 2013 presidential elections and was on the path to a decisive resolution to the nuclear stalemate with the international community. Finally, President Rouhani signed the historic JCPOA with the P5+1 in 2015,[5] helped partially lift the economic sanctions Iran was facing, and seemed to open a window of opportunity for Iran's closer integration with the international political and economic system. After Ahmadinejad's insistency on Iran's nuclear rights in the international arena, the international community interpreted the Iranian move to temporarily forsake its nuclear right under Rouhani's government as a sign of distancing away from revolutionary ideals, a gradual regime moderation, and demands for integration with the international system. JCPOA and associated expectations for moderation in Iran's internal and external policy remained to be the focus of foreign policy analysts and Iran experts in this context.

Nevertheless, what was largely overlooked by the academic community within the above-described context, and what policy circles finally became increasingly curious about, was the reverse foreign policy strategy Iran was pursuing in the Middle East during the same period. An overview of the transformation of region since 2003 is necessary to situate the Iranian strategy into a proper analytical context. Without doubt, the 2003 US invasion in Iraq was a systemic shock in the region, which precipitated a chain of transformations in Iraq with wider implications in the region. The fall of the Baath regime in Iraq created a power vacuum both in domestic affairs and regional affairs. The Sunni Baathist regime – long-described as the hallmark of Arab nationalism in the region - was replaced by electoral politics, which is dominated by a Shia-majority rule. As the sectarian demographics in Iraq favored Shiites in electoral politics, the period of electoral

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[5] For Joint Comprehensive Plan of Action (JCPOA), see 'Joint Comprehensive Plan of Action,' *US Department of State Website*, accessed May 21, 2018, https://www.state.gov/e/eb/tfs/spi/iran/jcpoa/.

politics witnessed a revival of the Shia *hawzas* in Najaf and Karbala, the increased relevance of Shia religious actors such as Ayatollah Sistani of Najaf in Iraqi politics, and a resurgence of Shia political parties long suppressed by the Baath regime including the Islamic *Dawa* Party and the Supreme Council for Islamic Revolution in Iraq (SCIRI).[6] There was a clear shift of power from the Sunnis to the Shiites under electoral politics and this finally resulted in a sectarian conflict in 2006.[7] A second systemic shock came only 5 years later in 2011, when Tunisians, Egyptians, and Libyans took to the streets protesting the authoritarian regimes. The existing governments were overthrown and a short moment of democracy swept in Egypt and Tunisia, where Islamic political parties came to power.[8] On the other hand, Libya fell into a tribal civil war, attracting foreign jihadists who wanted to establish an Islamic caliphate in this failed country.[9] It was clear in 2011 that Islamist political ideology, religious and sectarian identities, and religious actors would matter in the political reconfiguration of the Middle East. As a matter of fact, the spill-over of the Arab protests in Syria and Yemen manifested themselves as wide-range sectarian conflicts.[10] The sectarian war was soon transformed into a sectarian proxy war that pulled in regional players, possibly out of regional leadership calculations but also along sectarian and ideological lines. Finally, a Sunni jihadist group calling themselves the Islamic State in Levant (ISIL) captured the city of Mosul in Iraq in 2014 and declared a caliphate.[11] The rise of ISIL in Iraq was the result of political grievances Sunnis felt with the de-Baathification of Iraq, which was then merged with foreign jihadist dissents from al-Qaeda and established a transnational Islamic state on Iraq and Syria. A sequence of these events in the region since 2003 showed the centrality of religious elements, Islamist political ideology, sectarian identities, Islamist and/or Shia

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[6] See Soren Schmidt, 'Shia-Islamist Political Actors in Iraq: Who are They and What do They Want?' *Danish Institute for International Studies Report* 3, 2008, https://www.files.ethz.ch/isn/46712/DIIS-RP_2008-3_web.pdf.

[7] James A. Baker III and Lee H. Hamilton, eds., *The Iraq Study Group Report*: *The Way Forward, A New Approach* (New York: Vintage Books, 2006).

[8] On the rise of Islamism in Egypt and Tunisia, see Khalil Al-Anani, 'Islamist Parties Post-Arab Spring,' *Mediterranean Politics* 17, issue 3 (2012): p. 466-472.

[9] See Zineb Abdessadok, 'Libya Today: From Arab Spring to Failed State,' *Al-Jazeera*, May 30, 2017, https://www.aljazeera.com/indepth/features/2017/04/happening-libya-today-170418083223563.html.

[10] See 'Syria's Civil War Explained from the Beginning,' *Al-Jazeera*, April 14, 2018, https://www.aljazeera.com/news/2016/05/syria-civil-war-explained-160505084119966.html, and 'Key Facts about the War in Yemen,' *Al-Jazeera*, March 26, 2018, https://www.aljazeera.com/news/2016/06/key-facts-war-yemen-160607112342462.html.

[11] 'The Rise and Fall of ISIL Explained,' *Al-Jazeera*, June 20, 2017, https://www.aljazeera.com/indepth/features/2017/06/rise-fall-isil-explained-170607085701484.html.

political parties, religious political actors, and jihadism as defining the conflicts, power games, and the reconstruction efforts defining the Middle East today.

Iran's foreign policy in the Middle East after 2003 should be evaluated within the above-described regional context. The Iranian regime responded to the shifts in reginal power balances and domestic political order with quite an assertive foreign policy strategy. Reliance on Shia identity was the prime Iranian strategy in Iraq right after the invasion. As such, Iran's initial reaction to the political power shift in Iraq from the Sunnis to the Shias was one of intense political support for Shia political parties and building a unified Shia block in electoral politics.[12] However, the increasing sectarian violence in Iraq after the withdrawal of American troops in 2011, the eruption of sectarian war in Syria, and the rise of ISIL pushed Iran towards more overt military strategy in the region. By 2014, the Islamic Revolutionary Guards Qods Forces – which was originally tasked with the export of the revolution during 1980s - mobilized an extensive network of pro-Iranian Shia militias in Iraq, sent Iranian *Basij* volunteers to fight in Syria, cooperated with Lebanese Hezbollah in mobilizing a small of number of Shia villages to fight against domestic opponents in Syria, and moved its Iraqi proxies to Syria to fight alongside the Assad regime.[13] Without a doubt, Iran's Middle East policy relied heavily on the political and military mobilization of Shias across the region. This overt military activism required justification on the part of the Iranian regime. In this respect, a heavy ideological discourse with strong references to the Islamic Revolution and Shia symbolism accompanied the Islamic Republic's strong political and military activism in the region.

A central discourse adopted by the Islamic Republic in referring to its policy in the region was 'resistance' – a rather familiar concept rooted in the Islamic ideology of the Iranian regime, as well as the Holy War. Over the years, the concept has been deeply ingrained in the ideology of the Islamic Republic with everyday ramifications. As a matter of fact, any visitor of Tehran with a knowledge of the Persian language will quickly recognize upon entering any quality bookstore in Tehran that bookstores have separate

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[12] See Michael Eisenstadt, Michael Knights, and Ahmed Ali, 'Iran's Influence in Iraq: Countering Tehran's Whole-of-Government Approach,' *Washington Institute Policy Focus* 111, April 2011, http://www.washingtoninstitute.org/uploads/Documents/pubs/PolicyFocus111.pdf.

[13] Bayram Sinkaya, 'Arap Baharı Sürecinde İran'ın Suriye Politikası,' *SETA Analiz*, no 53, April 2012. http://file.setav.org/Files/Pdf/20121121171707_seta-arap_bahari_surecinde_iran'in_suriye_politikasi.pdf.

sections on the theme of 'resistance,' or '*mogawamat*' as it is said in Persian. Hundreds of books published on Iran's own experience of 'Holy Defense' and 'popular mobilization' will catch the visitor's attention immediately. What the visitor will find next among the shelves is another hundreds of books written not on Iran, but on the Palestinian resistance and Lebanese Hezbollah against Israel though, a topic the Islamic Regime is very vocal about.[14] A sense of continuity in the Iranian understanding of 'resistance' is visible, where Palestinian and Hezbollahi resistance are recognized as parts of the same international movement headed by the Iranian Resistance since the Revolution. But the concept of 'resistance' has proved to be dynamic rather than static. In line with regional changes, the concept has surpassed its original content, now covering not only the activities of self-acclaimed resistance groups such as PLO and Lebanese Hezbollah, but also the Syrian regime and the pro-Iranian Iraqi Shias in the recent years.

This point is quite visible in the speeches of Iran's Supreme Leader Ayatollah Khamenei, but more so in the statements issued by IRGC members. The IRGC commanders and *Basijis* talk about 'resistance' not necessarily as an individual policy orientation solely attributable to the Islamic Republic, but as an 'axis' or as a 'front' of resistance movements in the Middle East that are traditionally allied with and led by Iran.[15] The common terms used are 'Resistance Axis' or 'Resistance Front' – '*mehvar-e moqawamat*' or '*cephe-ye mogawamat*' in the Persian language. In the current usage, the groups in question are predominantly Shia political actors and Shia movements. This axis thus includes the Lebanese Hezbollah, the Alawite Assad regime in Syria, the Shia political parties and the pro-Iranian Shia militia in Iraq and Yemen in the past couple of years. The common denominator binding these groups together is that they are either predominantly Shia or share an ideological affinity with Iran. In its traditional usage, the opposition of the axis is against the American policies in the Middle East, 'Zionist' policies of the primary US ally in the region – Israel, and the Arab client regimes in the

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[14] This observation is based on the author's field trip to Tehran, Iran in July 2016.

[15] An example can be found in a news article on Sepah News, where an IRGC commander says 'The first strategic principle of the Islamic system was to support and rely on the resistance axis and to support the oppressed people of the world such as in Afghanistan, Iraq, Syria, Palestine, etc., all of whom are examples of this support. The strategy of the Islamic Republic of Iran in Syria focuses on the axis of resistance and the preservation of Syria lies in the core of the resistance.' 'Sardar Hajizadeh Motreh Kard: Pasohe Kubande Sepah Tahdidat Belof Siyasi Nist (General Hajizadeh Argued: Sepah's Harsh Response to Threats is not a Political Bluff),' *Sepah News Website*, accessed May 21, 2017, http://www.sepahnews.com/index.php/sepahnews/item/3850-سردار-حاجی-زاده-مطرح-کرد-پاسخ-کوبنده%E2%80%8C-سپاه-به-تهدیدات-بلوف-سیاسی-نیست.html.

Middle East. Except Palestinian resistance groups, all other parties are minority or majority Shia groups (or Shia off-shoots) who have not yet attained political power in their countries of origin - except for the Assad regime in Syria. Iran's 'axis of resistance' policy thus reflects a Shia predominance in the changing regional context where sectarianism is on the rise.

Given these developments, Iran's relations with the Shia government in Iraq, its unfailing support for the Assad regime, military ties to Hezbollah, and supportive stance towards the minority groups in Yemen have finally raised Iran to newspaper storylines and policy analyses for a reason other than the staggering nuclear deal in the last couple of years. Religion, sectarian identity, Shiism, and ideology seemed to define the nature of Iranian involvement in the region. The first person to address the Shia aspect of this policy was the King Abdullah of Jordan, who talked about a Shia political revival in the region as early as 2014, in the shape of a 'Shiite Crescent' spanning from Lebanon on the Northwest of the Middle East to the Shia-dominated Iraqi government and Iran on the East and down to Yemen on the southern edge of the Arab peninsula.[16] The 'Shiite Crescent' concept carried an overt religious symbolism for having an element of 'Shia' in it. The term was adopted for a time by policy analysts and scholarly research was generated discussing the existence and/or implications of the Shiite Crescent for the politics of the Middle East during the last decade.[17] On the other hand, the Iranian regime has repeatedly rejected the claims over the existence of a Shiite Crescent, instead saying that Iran is supporting both Sunni and Shia resistance movements with ideological similarities, the most prominent example being the Palestinian Liberation Organization (PLO).

Nevertheless, the Iranian rejection of the term has failed to negate the strong Shia component in the Iranian foreign policy since 2003. Religion seemed to be a central component of Iran's foreign policy on the Middle East region. A common sectarian

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[16] See Robin Wright and Peter Baker, 'Iraq, Jordan See Threat to Election,' *Washington Post*, December 8, 2004, http://www.washingtonpost.com/wp-dyn/articles/A43980-2004Dec7.html?noredirect=on; and Kayhan Barzegar, 'Iran and the Shiite Crescent: Myths and Realities,' *Brown Journal of World Affairs* 15, no 1. (Fall/Winter 2008): p. 87-99.

[17] For prominent examples, also see Vali Nasr, *The Shia Revival: How Conflicts within Islam Will Shape the Future* (London and New York: W. W. Norton, 2007); Haji-Yousefi, 'Whose Agenda is Served by the Idea of a Shia Crescent?' *Alternatives: Turkish Journal of International Relations* 8, no. 1 (2009): p. 114-135; Maximilian Terhalle, 'Are the Shia Rising?' *Middle East Policy* 14, no. 2 (2007): p. 69-83; and Salloukh, 'The Arab Uprisings and the Geopolitics of the Middle East,' p. 32-46.

identity seemed to characterize the parties of the Iran-led 'axis of resistance.' The Iranian ideological security forces originally tasked with the 'export of the revolution' were the primary implementers of this policy on the field. Although Iran was following a rather reconciliatory foreign policy on the nuclear issue and a sense of moderation was visible with the Western countries, no moderation was in horizon on the Eastern front. When this research started in 2014, Iran's Middle East strategy strongly resembled 'the export of the revolution' policy of the first revolutionary decade indeed. The Qods Forces' involvement in the field, Iran's increased political and military involvement with Iraqi Shiites, and the heavy ideological and Shia discourses accompanying Iranian involvement all reminded Iran's aspiration to export its revolutionary ideology and system to the Middle East for the creation of an overarching Islamic state during the first decade of the revolution. Such commonalities between the first decade of the revolution and today raises curiosity over the intricacies of Iran's 'Axis of Resistance' policy in the region. An element of continuity is visible in Iran's foreign policy towards the Middle East, informed by revolutionary-ideological and religious elements, whereas there seems to be more fluctuation in Iran's relations with the West between pragmatist and ideological currents.

1.2. Research Question and the Scope of the Thesis

Against this background, this thesis aims to understand Iran's 'Axis of Resistance' policy in the Middle East today. What motivated this research is the observed incongruity between Iran's foreign policy towards the international community, or its Western foreign policy, and its policy towards the Middle East, or the Eastern foreign policy. In other words, this research is interested in understanding the incongruity between Iran's moderation of relations with the West during the nuclear talks, and the reverse, far-from-moderate strategy in the Middle East. Given the fact that religious and sectarian identity seems to be at the center of Iran's strategy in the region, this thesis is also motivated to understand the role of religion and Shiism in this foreign policy. Both motivations have shaped this research around two overarching research questions:

Research question I: Why does Iran pursue a foreign policy with distinct religious and ideological contours in the post-2003 Middle East, despite the observed pragmatism and rationalism in relations with the West during the same period?

Research question II: What role does religion play in Iran's 'Axis of Resistance' policy?

In answering both questions, this research is primarily committed to understanding and explaining what the 'Axis of Resistance' is. As such, a good part of this research is on mapping out the political, institutional, and ideological pillars of 'the Axis of Resistance.' However, this presents us a highly extensive regional phenomenon that covers several political players geographically dispersed across the Middle East, including the Lebanese Hezbollah, Assad regime in Syria, pro-Iranian Shias in Iraq, the Islamic Republic in Iran, Houthis in Yemen, as well as the Palestinian resistance groups. Therefore, the 'Axis of Resistance' is a highly complex phenomenon, where all players might have their own understanding of and policy for the phenomenon. Given the complex nature of this phenomenon, the scope of this research is limited to the Islamic Republic's perspective. It aims to understand the Iranian policy of the 'Axis of Resistance,' its motivations, institutions, and discursive pillars. As such, this research predominantly excludes other parties' perspectives of the 'Axis of Resistance' such as the Syrian perspective, Iraqi Shia perspective, and the Hezbollahi perspective. Moreover, this research is also limited to understanding the Iranian perspective on a specific geography: Iraq and Syria. There are three reasons for this geographical limitation. First, this research is interested in the religious and sectarian aspect of this phenomenon, and not very much on the traditional anti-Zionist, ideological aspect of the 'Axis of Resistance' alliance. Therefore, Palestinian Resistance is automatically excluded from the study. Secondly, Iraq and Syria have emerged as the two biggest cases reflecting and impacting the grand currents of political transformations in the region. The greatest revival in sectarian politics, Shia mobilization, and sectarian conflicts have taken place in both countries. This makes the study of both cases relevant to understand the religious and sectarian element in the 'Axis of Resistance' after 2011. And third, while Iran's foreign policy today covers Syria, Iraq, Yemen, and other Gulf countries with notable Shia populations, Iran's foreign policy since 2003 is focused on Iraq and Syria. Both are the two biggest cases where Iranian involvement has taken place. As such, both cases provide us more

comprehensive data and insights on the dynamics of Iranian engagement in the region. For the specified reasons, this research will examine Iran's 'Axis of Resistance' in Iraq and Syria.

Time-wise, this research covers the Iranian foreign policy towards Iraq between 2003 and 2017 and towards Syria between 2011 and 2017. The starting times refer to the events that have precipitated the rapid political changes defining the political context today. In this respect, the year 2003 refers to the American invasion of Iraq. On the other hand, 2011 has been chosen for multiple reasons, where it refers to the eruption of Arab uprisings, the beginning of the sectarian civil war in Syria, and the withdrawal of American troops from Iraq. All events were 'critical junctures' for Iran determining the course of its foreign policy on both countries. One difficulty regarding the study is that the 'axis of resistance' is very recent phenomenon and still in progress. The regional context lies on a shaky ground and thus is extremely susceptible to change via another systemic shock. The players, contexts, relationships, and calculations change very rapidly. Due to the topicality of the phenomenon at hand and its extreme susceptibility to change, this research has been limited to 2017 as the endpoint. This way, the study limited the collection of data within these specified time periods and fixed the data's relevance at a certain historical period, which facilitated theoretical analysis. Finally, while the 'Axis of Resistance' could be examined from a variety of theoretical perspectives, this study is confined to understanding the role religion plays in this policy from the Iranian perspective. Theoretically, the study of 'religion' within International Relations scholarship is a very recent phenomenon. An emerging research program committed to theoretically integrating 'religion' into the existing IR scholarship is in place for a decade. This research theoretically subscribes to and aims to contribute to that emerging scholarship, which will be discussed in the next section.

1.3. Religion and International Politics

The political science's interest in the study of religion does not have a prolonged history. 1950s and 1960s witnessed a tide of political theorists and comparative politics scholars consorting to modernization theory, which presumed a roughly monotonous and

progressive transition from the 'pre-modern' or 'traditional' to the 'modern' society. The rationalization of social and political institutions, processes, and cultures was not only the subject of scholarly research but also an aspiration, an oriented goal, a project by these scholars. Secularization in a progressively rationalizing social and political realm became an assumption rather than a hypothesis empirically verified and/or falsified by political science research.

A wave of socio-political transformations in the following decade brought the necessity to re-examine the key hypotheses of secularization theory - the decline in religious faith, the functional differentiation of the sacred and the secular, and the privatization of religion. World Values Surveys from 1980s onwards showed that faith in God has not decreased as hypothesized by secularization theory. The demographics of religious faith changed in favor of certain religions over others. A Pew Forum study found that given the current rates of birth, migration patterns, and religious switching for each religion, Muslims are expected to outnumber Christians after 2070.[18] Secondly, the functional differentiation of religion and politics has been challenged by the worldwide proof otherwise. In 1970s the Middle East and South East Asia witnessed a rise in religio-political movements, the Islamic Revolution of Iran of 1979 being a symbol of inauguration in this respect. The Iranian people, disillusioned by the socio-economic problems generated by the Shah's modernization policies, replaced the Shah regime with a Shiite clerical theocracy in 1979. Islamist political movements emerged in Egypt, Tunisia, Iraq, and Syria, challenging the authority of secular regimes in these countries. In South and South-East Asia, the rising Hindu nationalism instituted its political force in India in the form of Hindu nationalist parties in late 1960s, and the separatist Tamil movement in Sri Lanka campaigned for a Buddhist homeland. The Americas were not exempt from the growing influence of religion in politics either. The Catholic Church in Latin America spearheaded the democratization movements in Latin American countries against authoritarian rulers in 1970s, and Evangelical Protestantism imposed its influence over key public policy discussions in the USA. Such developments prompted many scholars to challenge, question, and re-write the contours of modernization and secularization theory.

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[18] For extended religious demographics, see Pew Research, 'The Future of World Religions: Populations Growth Projections, 2010-2050,' *Pew Forum*, April 2, 2015, http://www.pewforum.org/2015/04/02/religious-projections-2010-2050/.

The field of international relations ignored the role of religion in global politics more than any other sub-field of political science, however. IR's basic ontological assumptions about world politics and the dominant methodological and epistemological orientation of the field are the primary reasons for this lack of curiosity. Despite several differences, realism, liberal IR, and constructivism share one basic ontological assumption about world politics: the Westphalian order. All three paradigms converge on their acquisition that the world has evolved towards a system of sovereign, territorial, autonomous states since the 1648 Treaty of Westphalia.[19] The treaty is traditionally accepted as the hallmark of modern nation-state system after a period of multiple and overlapping sovereignties of kings, popes, princes, and feudal lords in the medieval Europe. In the Westphalian global order, autonomous, territorially distinct, and sovereign states are primary actors of international politics. The sovereign figure in the modern state has the exclusive authority to decide on matters pertaining to his territory. No sovereign sitting outside the state borders, feudal lord, king or religious actor, is legitimately authorized to intervene in the domestic matters of the modern states. Accordingly, IR has evolved as a field investigating the political, military, and economic interaction among these autonomous and territorially distinct political units. Rational self-calculation and power positions, which are often measured by material capabilities, are assumed to determine the nature of international interactions and individual foreign policy decisions in this system. Religion in this system is assumed to be restricted to the domestic realm only, with no influence on the nature of the system, inter-state interactions or interest calculations. Moreover, given the assumption that the state is the primary actor of international politics, non-state actors have long been marginalized in IR analyses. This often meant that non-state actors with religious and ideological priorities would only have marginal impact on the system, on actors' interactions, and policy calculations.

IR scholarship has been driven out of its comfort zone because of empirical developments that marked the increasing relevance of religion in world politics. Religious movements that were deemed to be domestic movements are no longer confined to national borders. To the contrary, they have increasingly transcended national borders, taken shelter in neighboring countries, and spread their missions and visions to other

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[19] Daniel Phillpot, '*The Religious Roots of Modern International Relations*,' *World Politics* 52, no. 2 (2000): p. 206-245; Elizabeth Shakman-Hurd*, The Politics of Secularism in International Relations* (New Jersey: Princeton University Press, 2007).

geographies. Religious movements within nation-states forge alliances with other nation-states, which provides them funding, military training, and technology for their own national foreign policy concerns. The Soviet invasion of Afghanistan during the Cold War and the mobilization of religio-nationalist Mujahedeen movement against the Soviets is a case in point, which benefited from the US assistance during its conflict with the Soviet Union. The collapse of the state and the ensuing power struggle among factionalized religious groups moved the Islamic fundamentalist and Wahhabi/Salafist political movement Taliban as the victor of the post-invasion regime in Afghanistan. Taliban's political influence soon transcended the Afghan national borders though, when similar Islamist insurgents thrived in the neighboring Pakistan and Afghanistan finally became a safe haven for the international Islamist jihadist network Al-Qaeda. The destruction of Twin Towers in 9/11 marked the beginning of a discursive, ideological, and political connection between Islam and terrorism in the minds of US foreign policy makers. The following decade is a testimony of how the US foreign policy took religious actors and religious movements seriously. The USA defined global terrorism as the top security threat to the country, headed the global campaign against Islamist jihadist terrorism, and assisted fragile and collapsed states in their state-building efforts against the rise of Islamist militants on these territories.

The social and political developments in the Middle East since the Arab Spring further proved the increasing salience of religion for national and regional reconfigurations in the last couple of years. The increasing visibility of Islamist political movements such as Muslim Brotherhood in Egypt, the rise of an Islamist political party to power in the post-Ben Ali Tunisia, the eruption of sectarian violence in Syria and Iraq, and the settlement of Islamic State of Iraq and Syria (ISIS) across the Iraqi-Syrian border not only aroused curiosity, but also created far more complex socio-political concerns for policy makers, international civil society groups, and political scientists. The prolongation and regionalization of the Syrian conflict, coupled by the disintegration of existing institutions, massive humanitarian crisis, and the ensuing chaos caught the international community unprepared. Neither failed and near-failing states of the Middle East, nor the militarily and economically more developed international powers seemed to possess the capability to solve the security complications posed by these developments in the region. The existing assumptions of transnational politics ingrained in the minds of policy-makers and policy analysts failed to provide the necessary tool box to understand

and explain the increasing salience of religion in global politics and to find solutions for the associated socio-political and security complications today. What was necessary was the formulation of a new terminology of global politics, new assumptions, and postulations to make sense of the transformation of politics across national borders along these questions.

Against these developments in world politics, political scientists slowly started to take the issue of religion more seriously. The first scholars to incorporate religion into their analyses were working within comparative politics rather than IR. They were particularly interested in studying alternative political identities such as ethnicity, nationality, and religion in the post-Cold War era. In this respect, Huntington's (1993) 'Clash of Civilizations' thesis undeniably stands as the primary work among the early scholarly works on religion and world politics.[20] Developing theories on the possible evolution of world politics in the post-Cold War era, Fukuyama (1992) was arguing that the clash of liberal and communist ideologies between two superpowers was over, leaving its way to the victory and dominance of one ideology worldwide.[21] In this rather optimistic account of post-Cold War global order, democracy, human rights, and liberal market economy would be the name of the game, leaving no room for further conflict among states. Huntington was challenging this very optimism, arguing instead that people's cultural and religious identities –instead of material gains or power politics- would be the main reason for conflict in the post-Cold War period.[22] His work received volumes of criticism by the academic community on ethical and scientific grounds. Ethically, the clash of civilization thesis was assumed to influence G. W. Bush's policy on Afghanistan and the Middle East, thereby becoming a self-fulfilling prophecy. Scientifically, Huntington's conceptualization of 'civilization' was highly criticized. The concept of 'civilization' has many aspects including the geography, religion and culture inherent within. However, Huntington used these aspects interchangeably in his analysis, thereby confusing the term. He categorized some of the six major world civilizations according to their cultural affinities (Eastern civilization), while some others were

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[20] See Samuel P. Huntington, 'The Clash of Civilizations?' *Foreign Affairs* 72, no. 3 (1993): p. 22-49; Samuel P. Huntington, *The Clash of Civilizations: Remaking of World Order* (New York: Simon and Schuster Publishing, 1996).

[21] Francis Fukuyama, *The End of History and the Last Man* (New York: Free Press, 1992).

[22] Huntington, 'The Clash of Civilizations?' passim; and Fukuyama, *The End of History and the Last Man,* passim.

categorized along religious lines (Islamic civilization). His problematic identification was further aggravated by his monolithic take on civilizations. Huntington did not consider religious and cultural nuances within his civilizational units; for example, he did not differentiate Sunni Islam from the Shia.

Huntington's 'clash of civilizations' and the criticism therewith affirmed the difficulty of studying religion within a social scientific paradigm. Despite such contentions, Huntington's thesis still opened a fertile research ground for more studies on religion. Another influential scholar following Huntingtonian lines, albeit in a more focused manner, was Juergensmeyer's (2008) work on religious nationalism.[23] Juergensmeyer's study sought to explain the root causes of the resurgent religious activism in the post-Cold War global social and political order. He argued that most conflicts in the post-Cold War period are not between different religious groups, but between secular nationalism and religious movements confronting it. Religious activism of Indian Sikh movement and the Islamic Revolution in Iran were among the responses to the populations' disenchantment with the modernist, secular nation-states. Religious identity rose as an alternative to the nation-state, Juergensmeyer argued, creating intra-state conflicts and religious revolutions worldwide. Without a doubt, these early works were influential contributions as they questioned the modernization thinking[24] and welcomed religion in social and political science analysis.[25]

The rising instances of religious violence and religious terrorism in global politics extended the scholarly space for the global study of these topics in early 2000s, but still from a non-theoretical and non-IR perspective. Juergensmeyer's (2000) work on religious terrorism and violence in five major religious traditions including Islam, Christianity, Sikhism, Judaism, and Buddhism sought to explain the root of violent behavior among religious groups with reference to cultures of violence.[26] Juergensmeyer provided the

[23] Mark Juergensmeyer, *The New Cold War? Religious Nationalism Confronts the Secular State* (Berkeley: University of California Press, 1993); Mark Juergensmeyer, *Global Rebellion: Religious Challenges to the Secular State, from Christian Militia to al-Qaeda* (Berkeley: University of California Press, 2008).

[24] Juergensmeyer, *The New Cold War?,* passim; Jose Casanova, *Public Religions in the Modern World* (Chicago: University of Chicago Press, 1994).

[25] Peter L. Berger, ed., *The Desecularization of the World: Resurgent Religion and World Politics* (Michigan: William B. Eerdmans Publishing, 1999); Gilles Kepel, *The Revenge of God: The Resurgence of Islam, Christianity, and Judaism in the Modern World* (University Park: Penn. State Univ. Press, 1994).

[26] Mark Juergensmeyer, *Terror in the Mind of God: The Global Rise of Religious Violence* (Berkeley: University of

theological justifications of violence ingrained in these religious cultures in the form of symbols. He argued that religious followers with a propensity towards violence see the world as a cosmic battle for which they voluntarily become martyrs. The symbols of cosmic battle and martyrdom were found to be recurrent in various off-shoots of religious terrorism. In a similar vein, Almond and Appleby (2003) studied the rise of fundamentalism worldwide, where they refuted the assumed association between Islam and fundamentalism by exploring the cases of fundamentalism in monotheistic (Christianity, Judaism and Islam) and syncretic (Buddhism, Hinduism) religions.[27] The bottom-line of their work was that all religions can generate fundamentalist movements depending on structural conditions such as economic factors and the conflict between secularism and religion in these polities, chance element which is defined as sudden political and economic crisis, and the movements' leaders choices to respond to these structural conditions and chance events. Against the increased association of religion with fundamentalism, terrorism, and violence in these studies, some scholars took an opposite position and focused on the peacebuilding role of religion. In this respect, Haynes (2009) examined how some religious personalities and organizations may function as 'religious peacemakers' promoting peacebuilding, tolerance, and reconciliation in conflict situations.[28] In a similar vein, Appleby et. al. (2010) studied the interrelation between Christian theology, the ethics of peace, reconciliation, and interreligious dialogue against their practical applications in diverse national and geographical contexts.[29] Finally, Seiple, Robert and Hoover (2004) emphasized the potential role of religion in conflict resolution and peace-making through 'faith-based diplomacy' in a world of armed conflicts, military interventions, and religious terrorism.[30]

Interestingly, the real theoretical engagement of the IR field with religion started in the British IR academia, even before religion was acknowledged as a pressing security

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California Press, 2000).

[27] Gabriel Almond and Scott Appleby, *Strong Religion: The Rise of Fundamentalisms around the World* (Chicago: The University of Chicago Press, 2003).

[28] Jeffrey Haynes, 'Conflict, Conflict Resolution and Peace-Building: The Role of Religion in Mozambique, Nigeria and Cambodia,' *Commonwealth and Comparative Politics* 47, issue 1 (2009): p. 52-75.

[29] Scott Appleby, Robert Schreiter, and Gerard Powers, *Peacebuilding: Catholic Theology, Ethics, and Praxis* (Orbis Books: 2010).

[30] Robert Seiple and Dennis Hover, eds., *Religion and Security: The New Nexus in International Relations* (New York: Rowman and Littlefield, 2004).

issue in the American IR academia after 9/11. Academic conferences in the British academia were organized on a wide range of topics concerning the place of religion in world politics, such as the impact of faith on armed conflicts, international political theology, and transformation of the international society via religious resurgence, faith and reconciliation.[31] However, these early scholarly works were more in the form of an under-theorized empirical outcry for the neglect of religion in international relations theory. This body of research unfailingly embraced a terminology that emphasizes the return of religion after a lengthy process of marginalization by the forces of modernization and secularization. Petito and Hatzopoulos' (2003) description of the religious phenomenon as a 'return from the exile' is a case in point. In their introductory chapter, Petito and Hatzopoulos argue that the association of religion with Islamic terrorism, the 'clash of civilizations,' the repressive authoritarian Islamic regimes, along with the rapid rise of religious parties elsewhere have put religion in the spotlight as a repressive political mechanism.[32] Petito and Hatzopoulos attempt to reverse the representation of religion as a repressive political mechanism, arguing that religion is actually the 'victim' of modernization due to its prolonged 'Westphalian exile.'[33] Still, the following chapters of their work are designed as an attempt to open up theoretical outlets for understanding 'the return of religion from exile' in the areas of religious pluralism,[34] securitization of religion,[35] and the global resurgence of religion.[36]

Thomas (2005) constitute another such example. Like Petito and Hatzopoulos' 'return from the exile' discourse, Thomas emphasizes the 'resurgence' of religion in global politics by arguing that three critical events signaled the return of religion to world

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[31] The most important conference in this respect was 'Religions and International Relations' in 1998, jointly organized by London School of Economics and *Millenium Journal*. The presented papers as well as new studies inspired by this conference were collected in a special *Millenium* issue in 2004, titled *Religion and International Relations: A Return from Exile* under the editorship of Fabio Petito and Pavlos Hatzopoulos, who had convened the 1998 LSE Convention.

[32] Fabio Petitio and Pavlos Hatzopoulos, *Religion in International Relations: the Return from Exile*, (NewYork: Palgrave, 2003).

[33] Ibid., p. 1-2.

[34] Scott Thomas, 'Taking Religious and Cultural Pluralism Seriously,' in *Religion in International Relations,* ed. Petito and Hatzopoulos, p. 21-53.

[35] Carsten Bagge Laustsen et. al., 'In Defense of Religion,' *Religion in International Relations,* ed. Petito and Hatzopoulos, p. 147-180.

[36] Richard Falk, 'A Worldwide Religious Resurgence in an Era of Globalization and Apocalyptic Terrorism,' *Religion in International Relations,* ed. Petito and Hatzopoulos, p. 181-208; and Fred Dallmayr, 'A Gobal Spiritual Resurgence?' in *Religion in International Relations,* ed. Petito and Hatzopoulos, p. 209-236.

politics: the Iranian Revolution of 1979, the collapse of communism leading to the rise of the Polish Church in Poland, and September 11 with the ensuing global war on terror.[37] Similar to Petito and Hatzopoulos, Thomas attempts to open up a theoretical outlet for the incorporation of religion into international relations theory at inter-state, intra-state and individual levels of analysis. Thomas expands Petito and Hatzopoulos' 'Westphalian bias' argument by analyzing the assumptions of positivism, individualism, materialism, and implicit secularism in dominant IR paradigms. Thomas' effort is one of deconstructing the existing IR paradigms, their assumptions, and conceptualizations given the empirical crisis generated by religion in world politics.

Fitzgerald (2011) convincingly challenged the discourse on religion as returning from exile and resurging, and instead argued that a scholar who studies religion and IR are wrong in advancing religion as a phenomenon to be re-introduced to world politics.[38] Indeed, religion has never been exiled by modernization and thus has never resurged, as the distinction between the religious and the secular has been a social construction and a 17th century myth.[39] Fitzgerald ambitiously problematizes religion, secularity, and politics. What is religion? What kinds of spiritual practices are counted as religious faith and what is the politics of this categorization? How do we differentiate the religious from the secular in social, political, or legal practice? His major contribution to the literature is his problematization of politics as a non-/secular enterprise. Fitzgerald argues that politics is constructed during modern times as a rational, problem-solving, and secular enterprise revolving around the issue of power. His problematization of modern assumptions on and conceptualizations of religion, secularism, and politics affirms the existence of a fertile research outlet for further examination of religious/secular actors, institutions, and practices.

These studies have gradually culminated into more theoretically informed accounts of religion in international relations. Among the first theoretically informed theses on religion and international relations is Hurd's work examining the relationship

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[37] Scott Thomas, *The Global Resurgence of Religion and the Transformation of International Relations: the Struggle for the Soul of the Twenty-First Century* (New York: Palgrave Macmillan, 2004).

[38] Timothy Fitzgerald, *Religion and Politics in International Relations* (New York: Continuum, 2011).

[39] Ibid., p. 87.

between different types of secularisms and foreign policy. Following the footsteps of Fitzgerald, Hurd (2007) argues that the modern secular world has a religious foundation already.[40] Hurd makes the point that Western notion of secularism has two empirical trajectories. The first is laicism, which creates two distinct realms as politics and religion and expels religion from the political arena. The second is Judeo-Christian secularism, which does not make any attempt to expel religion, but sees it as part of the socio-cultural life. States embracing any of these two trajectories tend to exhibit different foreign policy behaviors. Hurd shows that American foreign policy towards Iran is not secular, but informed by the Judeo-Christian secular tradition. Alternatively, the European Union, which embraces the laicist tradition, formulates a foreign policy towards Turkey on the basis of its laicist credentials. The research on the types of secularism take on a more ambitious and quantitative turn with Jonathan Fox' *A World Survey of Religion and the State* (2007). Fox attempts to re-conceptualize the relations between religion and government across 175 cases by examining multiple indicators such as the presence of an official religion, preferential treatment of certain religions, the treatment of religious minorities, and the government regulation of the majority religion.[41] The result is a composite index of 'government intervention to religion' (GIR), collected from data on countries between 1990 and 2002. Fox finds that multiple types of secularism exist across the modern world and he supports his thesis with individual case studies.

Finally, the theoretical acknowledgement of religion within the IR have pushed some scholars to theoretically incorporating religion into existing IR paradigms. These scholars examined the theoretical space religion holds, or can possibly hold, in realism, liberalism and constructivism without degenerating these research programs. One prominent attempt is Snyder's (2011) edited volume on religion and international politics, whose main point is that religion can be integrated into dominant IR paradigms without violating their core assumptions.[42] A striking section in his volume is on structural realism, the paradigm seemingly most hostile to religion due to its ontological and epistemological basis. On the assumption of anarchy, for example, he argues that while anarchy has been the prevailing international condition in all historical epochs, anarchy

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[40] Hurd, *The Politics of Secularism in International Relations,* passim.

[41] Jonathan Fox, *A World Survey of Religion and the State* (Cambridge, UK: Cambridge Univ. Press, 2007).

[42] Jack Snyder, ed., *Religion and International Relations Theory* (New York: Columbia University Press, 2011).

did not always mean the lack of a religious order. Similarly, he incorporates religious logic into the realist assumptions of balance of power and interest seeking behavior. From a philosophy of social sciences perspective, Snyder shows that religion can be incorporated into realism without necessarily degenerating this research program. Barnett and Nexon's (2011) pieces in the same volume expand the discussion by examining possibilities constructivist and liberal paradigms can offer for a scientifically informed study of religion.[43] In a similar vein, Sandal and James (2011) examine realism, neorealism, and neoliberalism to show how the religious element is already incorporated in these research programs.[44] What is remarkable about Sandal and James' review is that rationalist paradigms and their key theories do not inadvertently reject the role of religious ideas in world politics. Their compelling accounts of key IR scholars such as Morgenthau, Niebuhr, and Nye show that religious ideas may play an instrumentalist and functional role in shaping policy decisions by defining rational interests and the interaction context. Sandal and Fox' edited volume integrating religion into international relations paradigms is another comprehensive attempt to locate the relevance of religion within each IR paradigm along with its theoretical off-shoots.[45]

This research aims to build on the theoretical arena opened by these scholars integrating religion into existing IR paradigms of realism, liberalism, and constructivism. The Islamic Revolution of 1979 is one of those events that put religion as the basis of Iran's new government system and brought a systemic shock to the Middle East. The revolution had a far-reaching impact on the foreign policy orientation of the Islamic Republic. This thesis attempts to examine the role of religion in the Islamic Republic's foreign policy since its foundation and the evolution thereof by situating it into existing IR paradigms.

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[43] Michael Barnett, 'Another Great Awakening? International Relations Theory and Religion,' in *Religion and International Relations Theory,* ed. Snyder, p. 91-115; and Daniel H. Nexon, 'Religion and International Relations: No Leap of Faith Required,' in *Religion and International Relations Theory,* ed. Snyder, p. 141-168.

[44] Nükhet Sandal and Patrick James, 'Religion and International Relations Theory: Towards a Mutual Understanding,' *European Journal of International Relations* 17, no. 1 (2011): p. 3-25.

[45] Nükhet Sandal and Jonathan Fox, eds., *Religion in International Relations Theory: Interactions and Possibilities* (New York: Routledge, 2013).

1.4. Religion and Iran's Foreign Policy

The Islamic Revolution of 1979 was one of those striking events in the history of modernity that reversed the scholars' understanding of secularism and modernity. The Iranians overthrew the Shah regime which was committed to an ambitious program of Western modernization and finally replaced it with a Shia theocracy. Twelver Imamite Shiism is recognized by the Islamic Republic's Constitution as state religion and the state is ruled by *velayet-e faqih*, a modern conceptualization of Shia clerical rule introduced by Ayatollah Khomeini which means 'the guardianship of the jurist' in state affairs. One common misunderstanding concerning Iran is the representation of the Islamic Revolution as a one-shot event. The Islamic Revolution is frequently seen as a sudden, single event that quickly raised the Shia clergy as the ultimate political authority in Iran and traditional religious Shia school as the only determinant of the new system. While this representation is not hundred percent faulty, it is misleading for many reasons. First, the Islamic Republic is not a theocratic system that was established by the Islamic Revolution in 1979 for once and for all. Rather, we should see the Iranian Revolution as a critical moment that sparked a decades-long Islamic state-building process in Iran after 1979. The Islamic state building process included the definition of the state ideology, what this research will call 'revolutionary Islamism,' the identification of the role of the Shia clergy in politics, and the creation and consolidation of Islamic state institutions. The year 1979 is a midpoint of a Shia political movement that started by Shia clerical *hawzas,* clerical figures, and Shia theologians as far back as the 19th century across the Middle East, achieved a successful revolutionary manifestation in Iran, and transformed into an Islamic state-building in the decades to come. This is emphasized by the Supreme Leader Ayatollah Khamenei;

> 'The Revolution is a permanent process, not a temporary one so much so that we say an incident occurred at such and such a time during which a group of people poured to the streets and it lasted 10, 20 days or two or six months and it led to the overthrow of the regime. We cannot say that the Revolution is this. This is only part of the Revolution. The Revolution is an eternal and permanent reality. 'Revolution' means a transformation. Deep transformations do not occur in the course of six months or one, five years. Besides, transformation and big changes do not have an expiration date. They

never come to an end. This is what "revolution" means. Revolution is a constant process.'[46]

We should therefore think of the Islamic Republic as a work in progress for many decades, both preceding and proceeding the revolutionary moment in 1979. It is not a traditionally faith- or doctrine-based Islamic movement but a modern Islamist political movement shaped by the given socio-political and historical context preceding and proceeding it, the dominant understandings of legitimate political action and/or political movement, political ideological currents of the time, and finally the – often selective - interpretation of religious doctrines for the specified political action. As such, religion is not purely a faith system or faith doctrine in the political composition of the Islamic Republic after 1979. To the contrary, religion is in a dynamic and cyclical relationship with politics. Therefore, the Islamic Republic is not a theocratic system that was established by the Islamic Revolution in 1979 for once and for all, but a work in progress for the last forty years, constantly rebuilding and reforming itself for optimal functionality as a theocratic nation-state that functions in an international political environment that does not necessarily favor its survival and longevity.

Against this background, the concept of 'religion' needs further clarification when used in the political science and international politics field. The concept of 'religion' is more than a specific faith system and its doctrine manifested by a holy book, written codes, narratives, and traditions when used in international politics. That does not mean that the doctrine is irrelevant to politics, it does play a role. However, when talking about religion and politics, one means the practical implications of religious doctrine on non-religious spheres of life including the politics, economics and society through human interpretation of religious faith and doctrine. The historical, temporal, and spatial dimensions within which the religious faith and doctrine influence the ideology, institutions, actors, and political interactions matter. Such a conceptualization takes the religious faith out from its static nature and gives it increased dynamism. Many scholars better use the term 'public theology' instead of 'religion' to refer to its dynamic interaction with political, social, legal and institutional processes. Such conceptualization of religion opens up a richer space for us to discuss and understand the various political

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[46] Khamanei, Ali. 'IGRC Blocks the Enemy's Infiltration.' *The Supreme Leader Ayatollah Khamenei's Website*, published September 16, 2015, http://english.khamenei.ir/news/2155/IRGC-blocks-the-enemy-s-infiltration.

manifestations of religion across the globe. For example, when using the term 'political Islam', one should be aware of the fact that there is no one 'political Islam', but 'political Islams.' The Khomeini's activist Shiism is one type of political Islam, while the quietist Shiism of Najaf is another. Salafism/Wahhabism is a one brand of political Islam shaping and shaped by Saudi politics in the Gulf, while the Islamist political parties in Tunisia and Turkey are another brand. Even when one looks at the variety of Islamist jihadist groups in Syria, Libya, and Iraq, one will see that they all entertain different ideas about the proper religio-political order as well as the tools and mechanisms for establishing this order. This variety is the result of the variety of interpretations as well as political, social and legal necessities informing such interpretations at a specific time and space.

That being said, the first step of this research is to carefully extricate the 'religious element' from the religio-political complex called the Islamic Republic. What do we mean when we talk about 'religion' in the Iranian political system? Is it the faith doctrine? The religious and sectarian identity of the Iranian population and the regime? The religious ideology? Religious actors? Or religious institutions? Scholarly attention will be given to the question of how religious faith manifested itself in the ideological, institutional, and political configuration of the nation at a specific time. Answering these questions thus requires a deeper understanding the contours of transnational Shia political activism and Khomeini's version of politically activist Shiism, i.e. how long-accumulated socio-political, ideological, intellectual, and religious inputs formed the basic tenets of the activist, revolutionary, Shia ideology of the Islamic Republic, its institutions, actors, and power centers. This research is not treating 'religious' and 'political' as binary opposites, as they constantly feed into each other. Rather, it is recognizing the dynamic, cyclical relationship between the two and aiming to dissociate the 'religious element' therein for a better understanding of its meaning and role in Iranian politics.

The second step in understanding the role of religion is to gauge how religion, after shaping the ideological orientation, institutional structure, and domestic power centers, manifested in Iran's foreign policy after 1979. Chapter 3 of this thesis will show in detail that religion manifests in Iran's foreign policy in multiple fronts: religion as identity, religion as ideology, religion as a transnational ontology, and religion as an institution. Briefly, the transnational Shia networks that developed in the 19th and 20th centuries; the Islamist revolutionary ideology as an amalgamation of anti-liberal

modernism, anti-imperialism, Shiism, and revolutionary Islamism; the Karbala narratives of the Shia faith, martyrdom and sacrifice; and the early experience of the Islamic Republic in the Holy Defense War and the export of the revolution have leagued together to shape the Islamic Republic's foreign policy roles, duties, interests, objectives, and capabilities. Religion informs Iran's foreign policy on many fronts. Nevertheless, not all dimensions fare equally in Iran's foreign policy across time, place, and theme. To the contrary, certain dimensions may be highlighted more at a specific time over others. This research will discuss what determines the predominance of one factor over another in the course of Iran's foreign policy and thus contribute to the scholarship on the role of religion in foreign policy making.

The above-mentioned point has been largely ignored in the existing research on Iran's foreign policy. The existing research has rather focused on an observed swing between 'rationality' and 'ideology' in Iran's foreign policy over the last four decades. Tracing this swing, scholars of Iranian foreign policy have traditionally studied the foreign policy of Iran by dividing it into several periods: 1) the revolutionary period between 1980-1989 which covers the Supreme Leadership of Imam Khomeini, 2) the period between 1989-2005 which coincides with conservative-pragmatist Hashami Rafsanjani's presidency and his reformist successor Mohammad Khatami, 3) the period between 2005-2013, which is characterized by the presidency of hardliner Mahmoud Ahmadinejad and finally 4) the period since 2013, when another centrist and pragmatist president Hassan Rouhani assumed office. This periodization relied on two problematic assumptions. First, such accounts treat the issue of 'ideology' and 'rationality' as binary opposites. The Iranian foreign policy orientation is depicted as if the Islamic Republic is walking on a tight rope, one end signifying rationality and the other ideology. Second, such accounts lie on the assumption that what determines the Iranian regime's position on this tight line is domestic political factionalism. Should the regime elites observe full commitment to the precepts of revolutionary ideology which makes Iran 'the Islamic Republic' as hardliners propose? Or should they reform the system economically and politically by opening the regime up to the system and forging closer and deeper relations with the rest of the world as pragmatists suggest?

It would be equally problematic to argue that factionalism does not play role in Iran's foreign policy. To the contrary, factionalism plays a significant role. However, an

over-reliance on factionalism in foreign policy research masks a deeper underlying structural problem emanating from the very existence of the Islamic Republic. One preliminary observation concerning the Islamic Republic is an existential confusion and duality in the international arena. As Chapter 3 will discuss in more detail, the Islamic Revolution is defined by Iran as a transnational revolution which places self-ascribed transnational Islamic roles and duties on the shoulders of the Islamic Republic. The revolution is aimed to establish an Islamic *Ummah,* overthrowing the Westphalian nation-state system and uniting all Muslims both Sunni and Shia under a single Islamic authority. On the other hand, the Islamic Republic continued to function as a modern nation-state, sharing the basic national interests of territorial integrity and political survival with any other state within the system. Iran's existential dilemma was very clear: The Islamic Republic was a 'revisionist' state that followed 'anti-systemic' foreign policy ultimately aimed to reverse the Westphalian international order, but also needed to conform to the rules of interaction of this very system to ensure its own survival. On the one hand, the Islamic Republic has allegiance to the very transnational Islamist political movement from which it emerged, which defines religio-ideologically defined transnational duties, roles, and interests for Iran. On the other hand, the state has to ensure the nation-state's interests, which are predominantly rationally and pragmatically defined.

One central argument of this thesis is that the Islamic Republic's above-described identity crisis has been the primary determinant of its foreign policy for the last four decades. Domestic factionalism should be treated as an extension of this underlying structural dilemma. The domestic political elites' perception of the regional and international political context, their preference-ordering and priority-setting concerning the Islamic Republic's roles, duties, interests, and objectives in external relations is strongly bound by the existential dilemma of the Islamic Republic. In a similar vein, the discussions over 'ideology' and 'rationality' are an extension of this very dilemma. However, a closer observation shows that the direction of shift between 'ideology' and 'rationality' is not as much chronologic and periodic as it is circumstantial and thematic. While it might be true that the Islamic Republic is walking towards either end of the rope during certain periods, most change happens depending on the circumstances and the policy theme at hand.

Chapter 4 will show that Iran's foreign policy between 2003 and 2017 is a good laboratory to show the above-described point. Upon examining the nuclear diplomacy of the pragmatist president Rouhani with the USA and Europe, this seems to be the epitome of rationality and pragmatism in Iran's foreign policy. Signing a deal with the USA, the ideology arch-opponent of the Islamic Republic, along with the implications of the deal for the future of nuclear technology, economic liberalization and the possible transformation of the Iranian society stirred domestic discussions especially within the more conservative and hardliner circles. The previous presidents had already positioned themselves on the nuclear issue in line with the political faction they are representing. However, this very rational policy of nuclear diplomacy coincided with increased Iranian engagement with the Iraqi and Syrian regimes. We witnessed more overt military presence of IRGC officers in the field supporting the predominantly Shia entities against the advance of ISIL and other Sunni extremist groups and the Iranian leadership was bolder regarding the Iranian presence in the region. The Middle East policy is there since 2003 despite the presidential changes across factional politics.

This leaves us with multiple conclusions. First, the influence of factional politics depends on the foreign policy issue area. Accordingly, there is a constant inter-factional rift and a repeated shift between 'rationality' and 'ideology' on nuclear diplomacy and relations with the West. On the other hand, there seems to be less change and more continuity in Iran's relations with co-sectarian, co-ideological, and co-religious political movements. As existing influential scholarship on Iran's foreign policy predominantly examine the very topical nuclear issue, factionalism seems overemphasized as a basic determinant of Iran's foreign policy, and the strong continuity over other foreign policy issues is largely overlooked. This thesis aims to examine the elements of 'continuity' in Iran's foreign policy with a specific focus on Iran's Middle East policy between 2003 and 2017. While Chapter 3 will show the institutionalization of the 'religious' element in Iran's foreign policy on multiple facets over decades, Chapter 4 will map out how this institutionalization was manifested in the basic foreign policy strategies the Islamic Republic adopted after 2003 in the region. Chapter 5 will lay out Iran's foreign policy discourses regarding its Middle East policy after 2003 and shed important insights on the complicated relationship between 'rationality' and 'ideology' in the Islamic Republic's foreign policy. Forty years after the Islamic Revolution, the Islamic Republic can be

identified as a consolidated revolutionary regime today. Religion has become an institutionalized foreign policy element of this consolidated revolutionary regime.

1.5. Methodology and Data

This study is conducted by the use of multiple qualitative methodologies. Process tracing has been predominantly employed to historically trace the evolution of the role of religion in Iran's foreign policy. Collier defines process tracing as 'an analytical tool for drawing descriptive and causal inferences from diagnostic pieces of evidence – often understood as part of a temporal sequence of events or phenomena.'[47] This research is based on a within-case-study that aims to understand the evolution of transnational Shia political activism and its implications on the Islamic Republic's foreign policy after 1979, which renders process-tracing a useful method. A thorough description of the phenomenon and related concepts is the first step of this research. In this respect, the research first makes a thorough description of how the seeds of political Shiism were sown in the 12th century and evolved into transnational Shia political activism in the 21st century. Second, the varying conceptual reflections of this phenomenon on the Islamic Republic's foreign policy since 1979 are identified. In this respect, a large body of Islamic Republic's peculiar foreign policy concepts such as the 'holy defense war,' 'export of the revolution,' 'Islamic Awakening,' and 'axis of resistance,' among others, are explained in detail. Besides descriptive inference, process-tracing is employed in this research also for causal inference, where it is used to test the explanatory power of three competing hypotheses in understanding the increased role of religion in Iran's Middle East policy today.

A second qualitative methodology employed for this study is field research conducted in the summers of 2015 and 2016 in Tehran, Iran. These field trips included an anthropological observation of the Iranian state system and culture, albeit to a modest extent, as well as Persian language-training and elite interviews with relevant researchers, academics, policy-makers. The field research included repetitive visits to the military

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[47] David Collier, 'Understanding Process Tracing,' *PS: Political Science and Politics* 44, issue 4 (2011): p. 823.

museums and the revolutionary, ideological, and religious landmarks of the Islamic Republic in Tehran. Moreover, I also made field observations during the ideological and religious celebrations of the Islamic Republic including the Holy Defense Week celebrations and Shia religious ceremonies. Both experiences provided important insights and illuminating information on religion-state and religion-military culture relations. These observations provided the necessary background knowledge to better understand and analyze the Islamic Republic's ideology, religion, institutions, and military culture.

Nevertheless, a most significant aim of the both field trips was the elite interviews conducted in Iran with a variety of people who are engaged in the foreign policy making circles of the Islamic Republic. A good part of the interviewees referred to in this thesis include the foreign policy experts of the Center for Strategic Research (CSR), one of the two leading foreign policy research institutes in Iran. As a leading foreign policy research institute, CSR is affiliated with a state institute, the Expediency Council of the Islamic Republic. CSR is headed by Ali Akbar Velayati, who is the chief foreign policy advisor of the Supreme Leader Ayatollah Khamenei in the National Security Council of Iran. The current research endeavors of CSR are to support the policies of the conservative-pragmatist Hassan Rouhani's government. Therefore, the interviews conducted with CSR researchers predominantly reflect the foreign policy vision of the current government. The rest of my interviewees were foreign policy experts, researchers, academics, and journalists from Center for Islamic Research, ANA News Agency, Center for Middle East Strategic Studies, Shahid Behesti University, Tarbiat Modarres University, and Imam Hossein University – the university owned and run by the Islamic Revolutionary Guard Corps. I also interviewed several researchers, diplomats, journalists, academics working in Turkey, Washington, and Iraq. A total of 22 elite interviews were conducted for this research, of which 19 were used in this dissertation. The remaining interviews were not used due to a lack of direct relevance to the topic. While a few interviewees have agreed for their names to be disclosed throughout the thesis, a majority of my interviewees have chosen to remain anonymous. Therefore, instead of using their names, I coded those anonymous interviewees with numbers. The field research in Iran and the interviews constitute the backbone of this thesis. They not only contributed to my understanding of the intellectual and institutional pillars of the Islamic Republic and the Islamic Republic's foreign policy culture, but also provided the data and insights delineating Iran's policy in the Middle East today.

Another set of data used for this research concerns armed Shia mobilization in Iraq and Syria. By collecting the Shia mobilization data, I aimed to map out the characteristics and size of armed Shia mobilization across two countries and to determine the extent of Iranian influence over Shiites across the region. One problem I encountered during this process is that a considerable amount of data exists on Sunni armed mobilization, and more so on Sunni jihadist groups, but less so for Shia armed groups. The data is predominantly taken from a limited number of, yet highly detailed and ambitious, works and datasets collected by individual area researchers, university research centers, and think-tanks. Most data on Shia mobilization used in this research is based on 'Jihad Identifiers Database' collected and made accessible online by the Jihad Intel Group of the Middle East Forum.[48] Two other datasets where additional data is taken for dataset build-up and double-checking purposes are a Stanford University research project called 'Mapping Militant Organizations'[49] and 'TRAC Dataset' by Terrorism Research and Consortium.[50]

A new trend in the Western research circles is the appearance of a new body of individual researchers who are not necessarily associated with any university research center, think-tank or intelligence unit and yet collect a rich set of data by examining the social media accounts of religious armed groups.[51] Despite the general reliability and credibility concerns on this new type of independent social media researchers, they provide important details on the Syrian civil war and the fighting groups in their publications and blogs. One such prominent researcher whose data has heavily informed this research is Phillip Smyth.[52] The empirical richness provided by such researchers is a great contribution to the study of Shia networks in the Middle East at a time when the

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[48] For detailed information on Jihad Intel Project, see 'Main Page: Jihad Intel Project,' Jihad Intel Project, accessed June 20, 2017, http://jihadintel.meforum.org/.

[49] For detailed information on Mapping Militant Organizations Project, see 'Main Page: Mapping Militant Organizations,' Stanford University Mapping Militant Organizations, accessed May 3, 2017, http://web.stanford.edu/group/mappingmilitants/cgi-bin/.

[50] For detailed information on and access to TRAC dataset, see 'Main Page: TRAC, Terrorism Research and Consortium,' TRAC Website, accessed 5 May, 2017, https://www.trackingterrorism.org/.

[51] For a discussion on individual social media researchers, see Thanassis Cambanis, 'The Jihadi Hunters,' *Boston Globe*, October 2, 2014, https://www.bostonglobe.com/ideas/2014/10/02/the-jihadi-hunters/tTC2t6UNIyzlioSoGBs5VO/story.html.

[52] About the data collected by Smyth, see Phillip Smyth, 'The Shiite Jihad in Syria,' *Washington Institute*, February 2015, https://www.washingtoninstitute.org/policy-analysis/view/the-shiite-jihad-in-syria-and-its-regional-effects.

interest in compiling datasets on such groups is still in its infancy. Compiling data from such diversified sources, I created a Shia armed mobilization dataset which included Shia armed groups that were active sometime between 2003 and 2017 in Iraq and Syria. This dataset covers as much information on the characteristics of these groups as possible such as their year of origin, countries where they are active, their ideological orientations and relationships with other states, entities and institutions including Iran, Hezbollah, and *Hashd al-Shaabi*. One important note about the data on Shia armed groups is that the conflicts in Iraq and Syria are rather contemporary phenomena with a history of a decade at most. The conflict is an ongoing one, which makes rapid changes possible such as the rapid dissolution of existing groups, the formation of new groups, and the rapid formation and dissolution of alliances. Therefore, constantly updated data is necessary to map the linkages within the Shia armed groups networks.

Finally, one chapter of this thesis is devoted to understanding the featured discourses the Iranian political elites have increasingly adopted in addressing the socio-political developments in the Middle East since 2003. Discourse analysis is employed in analyzing this data. The data relies on multiple sources. The first source is the Supreme Leader Ayatollah Khamenei's speeches between 1988-2017. The Supreme Leader's speeches bear significance for mapping the general ideological orientation of the Islamic Republic. For one thing, he is the ultimate foreign policy decision-maker of the Islamic Republic of Iran, where other foreign policy actors often engage in a tug of war to get his backing regarding the adoption of a specific policy. For another, he often acts as the ideological trend-setter and observant of the Islamic Republic. As such, Ayatollah Khamenei's speeches provide us with important clues on how the Islamic Republic is framing the regional developments as well as the regime's response to such developments. The second source used for discourse analysis is Persian newspapers and news websites. The use of newspapers for discourse analysis in social sciences might present certain difficulties for the social science researcher. The chief among these difficulties lie in the fact that newspapers might act as unofficial information and propaganda bureaus of certain political actors. Newspapers are often far from objectivity in that case, with a potential to present the researcher with fake news and false data. Such problems of reliability and objectivity also hold true for Iranian newspapers. However, what makes certain Iranian newspapers and news websites relevant for the purposes of this research is that they act as official information channels for certain political actors.

This is especially the case with the Islamic Revolutionary Guard Corps. The IRGC is a security actor that often refrains from transparency and from freely giving out information on their activities. The IRGC thus does not have an official website as Ayatollah Khamenei does. However, the IRGC consistently distributes information about their political views military activities on officially designated media outlets. Therefore, data on IRGC's views and activities in the Middle East has been collected from IRGC-related news agencies and websites. The most frequently used news outlets included Mehr News Agency and Fars News Agency, two news agencies claimed run by and close to IRGC; the Sepah News, referred to as the official news channel of IRGC; as well as the official news outlet of Iranian *Basij*. These news outlets are frequently used to by researchers working on IRGC.

1.6. The Relevance of the Study

The relevance of this study is manifold. First, this study thematically focuses on a very recent history of the Middle East: the regional transformations between 2003 and 2011. Given the recentness of the socio-political events marking the transformation of the region, there are very few academic studies examining this period. Many of the existing works, also cited extensively in this research, are in the form of policy papers and think-tank reports. While these works make a great contribution on our empirical understanding of the regional transformations, they are theoretically under-developed. This study thus contributes to the intellectual space opened by such empirical studies by bringing in a more comprehensive empirical and theoretical element.

This is especially true for the study of Iran's foreign policy in the Middle East. As discussed above, many of the existing work on Iran's foreign policy focus on Iran's relations with the West and especially on the nuclear policy in the recent years. IR scholars have made great contributions to our understanding of Iran's nuclear program, the contentious relations with the USA, and the evolution of Iran's Western policy. However, the Islamic Republic's relations with the Middle Eastern states have been largely left under-explored. Very few scholars and non-academic researchers have an interest in the study of transnational Shia politics, Shia mobilization, and Iran's relations with the Shia

world. Very few academic volumes and even research reports have been generated on such topics so far, which makes existing studies extremely valuable. To my knowledge, there are no books written on the 'Axis of Resistance' in the English and Turkish languages either and the theme is largely under-explored. My stay in the USA as a visiting research scholar as a part of the dissertation writing process and my personal contacts with relevant scholars and policy researchers in New York and Washington DC have also shown that very few people are trained on these topics and the scholarly and policy interest has been rising only recently. As such, this study is a timely contribution to this recently rising research interest on transnational political Shiism and Iran's relations with the Shia world.

A second relevance of the study is that it is primarily based on two field trips to Iran. These field trips included an anthropological observation of the Iranian state system and culture, albeit to a modest extent, as well as Persian language-training and interviews with relevant researchers, academics, policy-makers. The field research as well as Persian language training helped me study the topic from an Iranian perspective, differentiate some ill-informed and biased accounts of the Islamic Republic found among English-speaking sources, and finally decrease the thesis' reliance on indirect and secondary analysis. The background of this research is also informed by academic volumes written by Iranian scholars in the Persian language. However, not all sources are cited in the thesis and they were primarily used to cultivate my approach to and understanding of the issue at hand. All in all, on-site observation, interviews conducted with Iranian policy elites and experts, and reliance on Persian sources are the methodological strengths of this research.

Finally, this research contributes to the scholarly debates on the increasing relevance of religion in world politics today. The study traces the evolution of the role of religion in Iran's foreign policy from the revolutionary period to 2017. By doing so, this research aimed to surpass the rationality and ideology dichotomy and to examine the more inter-dependent and intricate relationship between the two in the Iranian case.

1.7. Thesis Outline

After outlining the aim, the theoretical background, the methodology, and the importance of the study in the introductory chapter, this thesis will be divided into five more chapters. The second chapter surveys the existing literature on religion and international relations. The observed global phenomena leading up to the emergence of the research program called religion and international relations and a detailed literature review of this scholarship is outlined in this chapter. This chapter makes a lengthy discussion on the prospects of integrating religion into three IR paradigms, i.e. realism, liberalism, and constructivism/post-structuralism. The three hypotheses, each corresponding to how existing IR paradigms would answer the research questions, are presented at the end of this chapter.

The third chapter is a historical chapter that process-traces the role of religion in Iran's foreign policy from the revolutionary period onwards. This chapter first discusses the historical institutionalization of Shia clerics, learning *hawzas*, transnational Shia politics across the Middle East up to 1979, and the Islamic Revolution of 1979. This part is necessary to understand how the 1979 Islamic Revolution was the culmination of an ongoing transnational Shia political activism in the Middle East. The last part of this chapter discusses the evolution of the ideology and institutions of the Islamic Republic with two foreign policy phenomena in its early years – 'the Holy Defense War' and 'the export of the revolution' policy. A comprehensive historical background to the ideological development of Shia political activism in Iran as well as the development of the Islamic Revolutionary Guard Corps and *Basij* as the institutional extension of these developments is expected to prepare the analysis of current trends in Iranian foreign policy in the coming chapters. It should be noted that this historical chapter is a sketch of main historical developments that contributed to the evolution of Iran's foreign policy. The historical details provided in this chapter are less than complete and the list of the historical events is not exhaustive.

The fourth chapter examines Shia revival since 2003 in the Middle East. This chapter focuses on the Iranian strategy for the developments in Iraq and Syria and on Iranian links to emerging Shia networks in these countries. The first sections of this

chapter lay out the Iranian understanding of and strategy on the recent transformations in the Middle East by a reliance on my interviews. This discussion is also supplemented by a historical overview of Iran's relations with Iraq and Syria since 2003 and 2011 respectively. The following sections map out Shia mobilization across Iraq and Syria and the Iranian influence over this mobilization process by the use of Shia mobilization dataset. These sections are followed by an examination of a new security structure in both countries called 'popular mobilization forces' or 'national defense units.' The final part of this chapter discusses the implications of the Iranian strategy on Shia revival for the military transformation of the Middle East, the transnational ideological and institutional socialization, and for the future of political and military order in the Middle East.

The fifth chapter is devoted to an analysis of Iranian foreign policy discourses on the transformations of the Middle East since 2003. A survey of the discourses by Ayatollah Khamenei, IRGC commanders, as well as other foreign policy elites responding to regional transformations since 2003 are reduced to five core concepts: the Islamic Awakening, the resistance (axis), popular mobilization, *takfiri* terrorism, and finally the defense of the sacred shrines. The content, referents, and the historical evolution of these concepts are examined with examples taken from relevant sources. This chapter serves to understand the discursive patterns the Islamic Republic follows in disclosing its views on regional developments, devising its current mode of foreign policy, and finally in promoting this policy to both domestic and foreign audience. This chapter thus lays out how the Islamic Republic chooses to frame its activities and strategies in Iraq and Syria extensively.

Finally, the concluding chapter sums up the key propositions of this study with a comparison of the 'export of the revolution' and 'axis of resistance' policies. This comparison not only tests the hypotheses proposed in the second chapter, but also traces the evolution of the role of religion in Iran's foreign policy. This is followed by an acknowledgement of the limitations of this study and propositions for further research.

CHAPTER 2

THEORIES OF INTERNATIONAL RELATIONS AND RELIGION

2.1. Introduction

A survey of existing International Relations scholarship shows that the field of international relations has ignored the role of religion in global politics more than any other sub-field of political science discipline. As a matter of fact, religion traditionally stands uneasily with the existing international relations paradigms due to 1) IR's basic ontological assumptions about world politics, and 2) the dominant methodological and epistemological orientation of the field. This section will discuss the ontological, epistemological, and methodological foundation of the IR field that has theoretically complicated the integration of religion into IR frameworks.

Despite several differences, realism, liberal IR, and constructivism share one basic ontological assumption about world politics: the Westphalian order. All three paradigms converge on their acquisition that the world has evolved towards a system of sovereign, territorial, autonomous states since the Treaty of Westphalia of 1648.[53] The treaty is traditionally accepted as the hallmark of the modern state system after a period of multiple and overlapping sovereignties of kings, popes, princes, and feudal lords in the medieval Europe. In the Westphalian global order, autonomous, territorially distinct, and sovereign states are the primary actors of the international system. The sovereign figure in the modern state has the exclusive authority to decide on matters pertaining to their territory.

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[53] See Daniel Philpott, 'The Religious Roots of Modern International Relations,' *World Politics* 52, issue 2 (2000): p. 206-245; Hurd*, The Politics of Secularism in International Relations,* passim.

No sovereign sitting outside the state borders, feudal lord, king or religious actor is legitimately authorized to intervene in the domestic matters of the modern states as well as their interaction. Accordingly, IR has evolved as a field investigating the political, military, and economic interaction among these autonomous and territorially distinct political units, oftentimes excluding non-state actors. Religion was restricted to the domestic realm only, materialism and rationalism defining the nature of international interactions in its stead. Another consequence was that the sub-field of political science studying politics outside of the national borders was named "inter-national relations', with "nations' standing at the center of the phrase.

The realist paradigm with its classical and structural off-shoots accentuated the 'national' part of the Westphalian thinking more than any other paradigm. Borrowing from the philosophical traditions of Thucydides and Hobbes, the realist paradigm assumes that autonomous states operate in an anarchical international system with no central authority to govern inter-governmental relations.[54] The anarchical international system drives states towards self-help measures such as bandwagoning and balancing. The decision about which self-help measure to adopt is a matter of rational calculation in the Machiavellian sense. States bandwagon with or balance others out of interest maximization, security providence or power maximization. Norms, ideas and identities do not play any role in states' foreign policy decisions. Moreover, the realist paradigm characteristically defies the linkage between the domestic and the international except its neo-classical off-shoot, which assumes that states do not act as unified actors and their domestic characteristics matter in foreign policy making.[55] The Westphalian thinking is also evident in the strict realist distinction between the domestic and the international. After Treaty of Westphalia (1648) and Treaty of Augsburg (1555) restricted the political implications of religious

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[54] See Hans Morgenthau, *Politics Among Nations: The Struggle for Power and Peace* (New York: Alfred A. Knopf, 1948); Stephen M. Walt, *Origins of Alliances* (Ithaca: Cornell University Press, 1987); Kenneth Waltz, *Man, the State and War: A Theoretical Analysis* (New York: Columbia University Press, 1959); Kenneth Waltz, 'The Stability of Bipolar World,' *Daedalus* 93, no. 3 (1964): p. 881-909; Kenneth Waltz, *Theory of International Politics* (Reading: Addison-Wesley Publishing, 1979); Charles L. Glaser, 'Realists as Optimists: Cooperation as Self-Help,' *International Security* 19, no. 3 (1994-95): p. 50-90; Robert Jervis, 'Realism in the Study of World Politics,' *International Organization* 52, no. 4 (1998): p. 971-991; John Mearsheimer, *The Tragedy of Great Power Politics* (New York: WWW & Norton Company, 2001).

[55] See Fareed Zakaria, *From Wealth to Power: The Unusual Origins of America's World Role* (Princeton, NJ: Princeton University, 1998); Gideon Rose, 'Neoclassical Realism and Theories of Foreign Policy,' *World Politics* 51, issue 1 (1998): p. 144-172; Thomas Christensen, *Useful Adversaries:Grand Strategy, Domestic Mobilization, and Sino-American Conflict, 1947-1958* (Princeton, NJ: Princeton University, 1998); Randall L. Schweller, *Deadly Imbalances: Tripolarity and Hitler's Strategy of World Conquest* (New York: Columbia University Press, 1998).

affairs to domestic government of each territorial unit with the principle of *cuius regio, eius religio*, the relations among these territorial units were assumed to be freed from the influence of religious ideas, norms, and identities. The relations among these territorial units were reduced to non-normative, non-ideational, materialistic and/or rational interest-based policy choices. Consequently, the international system was assumed to be a secular one, without religious ideas, identities, or norms playing any part in its formation. One challenge for the realist research paradigm in the post-Cold War period has been the rise in religious and ethno-religious conflicts. Due to its secular and materialistic ontology, the realist paradigm has unwittingly ignored religious and sectarian conflicts in the Middle East and Southeast Asia though.

The liberal international relations scholarship has arguably challenged the Westphalian assumptions of domestic-international divide and the primacy of states as the actors of international system central to the realist thinking. Some liberal scholars stressed the relevance of non-state actors and international regimes,[56] some others studied the linkage between the domestic and international,[57] and yet others argued that regime and political leadership types determine the likelihood, magnitude, and severity of conflicts.[58] These scholars' challenge to the Westphalian principles was only limited to a few research topics though. Liberal IR scholars studied why international regimes were formed in certain issue areas but not in others; how multiple actors such as interest groups, political parties and political leaders with their multiple interests influence foreign policy outcomes; and why democracies rarely fight with one another. In the meanwhile, a wider

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[56] See Robert O. Keohane, *After HegemonyCooperation and Discord in the World Political Economy* (Princeton, NJ: Princeton University, 1984); Stephen D. Krasner, *'*Structural Causes and Regime Consequences: Regimes as Intervening Variables,' *International Organization* 36, issue 2 (1982): p. 185-205; Stephen D. Krasner, *Sovereignty: Organized Hypocricy* (Princeton, NJ: Princeton University, 1999); Ernst B. Haas, 'On Systems and International Regimes,' *World Politics* 27, issue 2 (1975): p. 147-174; Ernst B.Haas, 'Why Collaborate? Issue-Linkage and International Regimes,' *World Politics* 32, issue 3 (1980): p. 357-405.

[57] See Robert D. Putnam, 'Diplomacy and Domestic Politics: The Logic of Two-Level Games,' *International Organization* 42, issue 3 (1988): p. 427-460; James D. Fearon, 'Domestic Political Audiences and the Escalation of International Disputes,' *American Political Science Review* 88, issue 3 (1994): p. 577-592; Graham Allison and Philip Zelikow, *Essence of Decision: Explaining the Cuban Missile Crisis* (New York: Longman, 2nd edition, 1999).

[58] See John R. Oneal and Bruce Russett, 'The Kantian Peace: The Pacific Benefits of Democracy, Interdependence, and International Organizations, 1885–1992,' *World Politics* 52, issue 1 (1999): p. 1-37; William Dixon, 'Democracy and the Peaceful Settlement of International Conflict,' *American Political Science Review* 88, issue 1 (1994): p. 14-32; Bruce Bueno de Mesquita and Randolph M. Siverson, 'War and the Survival of Political Leaders: A Comparative Study of Regime Types and Political Accountability,' *American Political Science Review* 89, issue 4 (1995): p. 841-855; Bruce Bueno de Mesquita, et. al., 'Political Institutions, Policy Choice and the Survival of Leaders,' *British Journal of Political Science* 32, issue 4 (2002): p. 559-590; Bruce Bueno de Mesquita, et. al., 'Testing Novel Implications from the Selectorate Theory of War,' *World Politics* 56, issue 3 (2004): p. 363-388.

range of domestic political dynamics such as the circularity of state-society relations, the differential impact of political ideologies, the distribution of power among political actors went largely unnoticed in the research of liberal scholars. A similar neglect is also observable in the study of religion. Like realism, the liberal paradigm assumed that the sovereign, territorial, autonomous states are secular when it comes to their relations with one another. Religious identity is assumed to have national rather than international implications, creating a supposedly secular international system. Therefore, the study of states with religious constitutions such as Saudi Arabia and Iran, religious political actors such as the Pope, religious non-state actors and movements such as Evangelicals and the Organization of Islamic Conference were left untouched by the liberal paradigm. Another possible research outlet for liberal scholars could be mapping out different church-state relations configurations across countries and how they would impact foreign policy decisions. However, the secular ontology of the liberal paradigm left such topics unexplored, restricting them to the domain of comparative politics.

In contrast to realism and liberalism, the constructivist paradigm appeared to stand as a promising research paradigm to integrate religion into international politics. Constructivism's emphasis on ideas, identities, and norms renders this paradigm a potential outlet for research on religious identities. However, the early constructivist work suffered from the same shortcoming as its realist and liberal counterparts did: the assumed secularism of the international system. When Wendt argued that international system is a social construction, his primary emphasis was on the constructed and ever-constructing nature of anarchy.[59] He deconstructed the principles of sovereignty, self-help, rationality, and power politics inherent in the realist logic, implying that international change is possible if political actors and political scientists deconstruct their understanding of the international system. Another group of scholars problematize the international norms, their creation, dispersion, and influence the domestic politics of individual states.[60] From

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[59] See Alexander E. Wendt, 'The Agent-Structure Problem in International Relations Theory,' *International Organization* 41, issue 3 (1987): p. 335-370; Alexander E. Wendt, 'Anarchy is What States Make of It: The Social Construction of Power Politics,' *International Organization* 46, issue 2 (1992): p. 391-425; Alexander E. Wendt, *Social Theory of International Politics* (Cambridge: Cambridge University Press, 1999).

[60] See Martha Finnemore and Kathryn Sikkink, 'International Norm Dynamics and Political Change,' *International Organization* 52, issue 4 (1998): p. 887-917; Martha Finnemore, 'Norms, Culture, and World Politics: Insights from Sociology's Institutionalism,' *International Organization* 1996, issue 2 (1996): p. 325-347; Friedrich Kratochwil, *Rules, Norms, and Decisions: On the Conditions of Practical and Legal Reasoning in International Relations and Domestic Affairs* (Cambridge: Cambridge University Press, 1991); Friedrich Kratochwil and John Gerard Ruggie, 'International Organization: A State of the Art on an Art of the State,' *International Organization* 40, issue 4 (1986): p. 753-775; Yosef Lapid and Friedrich Kratochwil, eds., *The Return of Culture and Identity in IR Theory* (Boulder:

this research tradition flew a large collection of work on human rights norms, environmentalism, gender and conflict among others. Yet another group studies the emergence of a global civil society as distinct from a domestic civil society.[61] While these areas pose a fertile ground for the inauguration of a constructivist research tradition integrating religion, the assumption of the secular international system and the restriction of religious identities to national borders thwarted such studies.

The dominant epistemological and methodological contour of the IR field is another reason for the neglect of religion in the IR discipline. Epistemological discussions have traditionally had far-reaching impact on the evolution and growth of the IR discipline. As a matter of fact, two out of the three grand debates in the IR discipline are epistemological and methodological. One of these is the second debate, which reflects the behavioral revolution of 1960s in sociology and psychology and put empiricism at the heart of social science analysis. This debate questioned the validity of traditional interpretism and philosophical accounts that classical realists extensively relied upon for explaining conflict behavior. In its stead, the new generation IR scholars emphasized the use of empirical methods on the premises of verification, falsification and measurement across many cases. The collection of large conflict datasets such as the Correlates of War project marked the hallmark of this empiricist trend. With the second debate, IR has evolved towards a scientific enterprise, where empiricism, verification and falsification became the dominant norm for a scientific IR scholarship.

The third debate further expanded the epistemological and methodological evolution of the IR discipline, which started with the second debate. During 1980s-1990s an epistemological debate between positivist and post-positivist IR scholarship dominated the field.[62] Positivist scholarship is rooted in the assumption of an objective social reality and it aims to replicate the natural science methodologies to examine that reality. This scholarship is ontologically rationalist, meaning that there are observable

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Lynne Rienner, 1996).

[61] See Jens Bartelson, 'Making Sense of Global Civil Society,' *European Journal of International Relations* 12, issue 3 (2006): p. 371-395.

[62] See Yale H. Ferguson, 'Between Celebration and Despair: Constructive Suggestions for Future International Theory,' *International Studies Quarterly* 35, issue 4 (1991): p. 363-386; Steve Smith, 'The United States and the Discipline of International Relations: "Hegemonic Country, Hegemonic Discipline,' *International Studies Review* 4, Issue 2 (2002): p. 67–85.

rational regularities in the social order and these regularities can be revealed by scientific methods. Positivism is characterized by a total refutation of metaphysics and of the study of non-observables. Accordingly, positivists are methodologically empiricists, with a strong emphasis on observation, techniques of verification and falsification, and on measurement. However, contrary to the deterministic nature of natural sciences, social science positivists are probabilistic. Acknowledging the complexity of the social reality, positivists aim to uncover general patterns of international behavior and law-like regularities rather than general laws. Methodologically, the empiricism of IR is often equated with quantitative techniques such as survey methods and statistics. However, the importation of agent-based modeling from microeconomics rendered game theory and rational choice popular in IR scholarship in recent years. Positivist scholarship is often defined as a problem-solving enterprise due to its strong emphasis on explaining the causes of international phenomena. Accordingly, positivist scholars seek to explain 'why' a certain phenomenon happens rather 'what' happens or 'how' it happens. Positivist IR scholarship has studied a wide range of observable international phenomena including material capabilities, conflict and cooperation patterns, and the establishment of international regimes, among others. Balance of power, theories of international cooperation and democratic peace are among noteworthy theoretical contributions of positivists to the IR field.

The post-positivist scholarship departs from positivist scholarship with its assumption of a value-laden social order. The reality is not exempt from the agents' perception and interpretation of it. Accordingly, the social reality is under a constant process of construction, re-construction and de-construction, which makes an objective and infallible scientific examination of international phenomena difficult to conduct. Therefore, seemingly scientific inquiry into international phenomena is theory-laden and subjective. The theory-ladenness of social reality foregrounds the post-positivists' emphasis on the study of non-observables. The post-positivist IR scholars seek to uncover the patterns of construction, re-construction, and de-construction by examining the observable implications of non-observables. Their focus, therefore, is diverted towards the questions of "how' and "what', ignored by positivist scholars. The post-positivist focus on "how' and "what' questions traditionally foregrounds the "interpretive' nature of this research program. Post-positivists counter this labeling though, arguing that the distinction between interpreting and explanation is not clear-cut and "what' and "how'

questions often serve as a first step for explaining "why' an international phenomenon occurs. Methodologically, post-positivist scholarship is often criticized for lacking a rigorous set of scientific methods. However, the linguistic turn in IR, which brought language and the linguistic creation of norms and ethics to the center of post-positivist IR scholarship, made discourse analysis a widely-used method of investigation. Post-positivist IR has contributed to IR scholarship with the study of international norms and ethics, Marxism, feminism, environmentalism, critical security studies, among others. However, most of this research is criticized by positivist scholars for comprising a less than rigorous, systematic and scientific research paradigm.

The study of religion in IR scholarship falls at the center of this epistemological and methodological debate between positivists and post-positivists. The dominance of positivism in the American IR made religion a not-so-tenable topic to be studied for a number of reasons. First, the concept of religion is hard to define. The existing rationalist scholarship takes the conceptualization of religion for granted, narrowing it down to its 19th century modernist understanding as belonging to the realm of 'the sacred' and as a binary to the realm of 'the earthly' and 'the secular' as put forward first by Weber and Durkheim.[63] Such conceptualization pushed religion out of the study of politics, which is deemed to be an earthly and secular enterprise in modern times. Secondly, such a narrow conceptualization of religion creates operationalization and measurement problems for the predominantly positivist IR field. As religion assumingly belongs to the 'sacred' realm, it is deemed to be an 'unobservable' phenomenon by positivist scholars. The unobservable nature of religion pushed its study out of ontologically rationalist research traditions including realism and liberal IR. Methodologically, the measurement of this seemingly unobservable phenomenon stood uneasily with the dominance of large-N quantitative scholarship in IR.

In a Smithian sense, the orientation of American international relations field towards an ontologically rationalist, epistemologically positivist, and methodologically quantitative social science discipline is the main reason for IR's neglect of religion in world politics.[64] A survey of realist, liberal, and constructivist scholarship shows that IR

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[63] Max Weber, *The Protestant Ethnic and the Spirit of Capitalism* (London: Allen and Unwin, 1905); Emile Durkheim, *The Elementary Forms of the Religious Life*, (Paris: F. Alcan, 1912).

[64] Smith, 'The United States and the Discipline of International Relations,' p. 67-85.

discipline remained silent before the heightened relevance of religion in world politics. The study of religion was deemed to challenge the basic assumptions, premises and methodological orientation of these research programs and lead to scientific degeneration. Therefore, early studies on religion and world politics were theoretically hesitant, often in the form of under-theorized descriptive accounts mapping the resurgence of religion in global politics. Nevertheless, the very challenges religion posed to the basic ontological and epistemological orientation of IR opened a crack in the scholarship, where a fertile theoretical research ground flourished. A number of researchers made an attempt to problematize the concept of religion, while some others brought scholarly attention to how religion challenges the assumptions of the Westphalian order, including sovereignty, territoriality, and rationality. Ironically, the incorporation of religion to IR scholarship, which was feared to degenerate IR paradigms, soon proved to be a fertile research arena and enriched the IR field theoretically.

2.2. Religion and Realism

Realism is often depicted as a paradigm supposedly most hostile to the study of religion in the IR discipline. While this line of thinking is justifiable to a certain extent, it mirrors a paradigmatic prejudice as well. Realism is occasionally treated as a monolithic paradigm, built on an already fixed and undisputed body of core assumptions and premises. The truth is that realism is a not a monolithic paradigm and its core assumptions have been the central point of debate by scholars both within and outside of the realist paradigm. Accordingly, a thorough examination of different realist off-shoots is needed for an understanding of their take on religion in world politics. This thesis concentrates on classical realism, structural realism, and neo-classical realism for the purposes of this examination.

Classical realism is based on four main assumptions about international interaction: 1) nation-states are the primary actors of world politics, 2) states are unitary actors, meaning the state speaks with one voice when it comes to foreign policy decisions, 3) the international system is one of anarchy, where there is no legitimate central authority, 4) states' ultimate objective in this anarchic international system is to achieve

power and/or security, 5) therefore, they engage in a rational cost-benefit analysis in foreign policy decision-making processes. These five basic assumptions are not refuted by structural realists, although they are not shared by their neo-classical counterpart. What differentiates classical realists from structural realists however is the level of analysis. In Waltzian terms, classical realism is a 'first image' theory, which presumes that individuals are the main cause of international conflict.[65] The causes of wars are rooted in the nature of statesmen and foreign policy decision-makers, or more deeply, in the human nature itself.[66] Waltzian first image is consistent with Morgenthau's account of classical realism. Morgenthau sees human nature as the root cause of all foreign policy decisions and conflict.[67] He argues that anarchy creates a constant fear of indeterminacy and insecurity for its constituencies. In a Hobbesian sense, the ultimate aim of individuals in anarchy is security and survival. Individuals' fear of insecurity and instinct for survival is compensated by their lust for power. The end result is their constant engagement in self-interested behavior to achieve power.

Morgenthau's emphasis on 'human nature' as the root cause of war indicates that immaterial factors act as a background condition or as an independent variable shaping state behavior in classical realism.[68] The 'first image' factor that shapes foreign policy in Morgenthau's classical realism is the psychology, characteristics, and perceptions of individual statesmen. Individuals' psychology, weak dispositions, and prejudices can lead to miscalculated and unsound foreign policy decisions including conflict. Morgenthau's 'first image' theory indicates that classical realism is not theoretically prejudiced against immaterial factors that can play a role in the making of foreign policy. To the contrary, the individual-level analysis opens a space for the integration of culture, identity and religion into classical realism. The religious identity of key foreign policy-makers can lead to the formulation of a cooperation scheme among states and/or non-state actors sharing a religious identity. For example, the religious revolutionary ideology of Ayatollah Khomeini might be the primary reason for Iran's support to Shiite Hezbollah

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[65] Waltz, *Man, the State and War,* passim.

[66] Ibid.

[67] Morgenthau, *Politics Among Nation,* passim.

[68] Nükhet Sandal, 'Religious Actors as Epistemic Communities in Conflict Transformation: The Cases of South Africa and Northern Ireland,' *Review of International Studies* 37, no. 3 (2011): p. 929-949.

in Lebanon. Similarly, religious identity of statesmen and foreign policy makers may also shape their perceptions of threat and security, when a confronting state is of a different religious identity. The Sunni-Shiite distinction between Saudi Arabian and Iranian leadership is often attributed as a factor driving their foreign policy behavior towards each other.

Reinhold Niebuhr's *Moral Man and Immoral Society* (1932) illustrates a more direct discussion on the relationship between religious ethics and politics. As a Christian theologian, Niebuhr questions to what extent Christian religion and faith can help build a just and perfectly functioning society. His most basic contribution is his argument that faith might improve individual lives, while individual morality disappears when it is collectivized at the level of large groups and nations.[69] First, he argues that Christian religion creates a sense of fallible and imperfect human being, who is afflicted with the original sin as opposed to an almighty and infallible God. The idea of fallible, guilty, powerless human being might lead people to assume that they do not have the capacity to find solutions to political and social problems.[70] The religious idealists and sentimentalists fall into a sense of 'defeatism,' where they believe all the injustice, inequality, slavery, and wars are a part of God's 'natural law' on earth for the sinful men.[71] Therefore, the religious idealists do not make any attempts to improve society. Secondly, while human egotism might be overcome with the Christian ideals of love and compassion, groups lack the capacity to transcend self-interests and observe sympathy for outsiders. This un-transcended egotism will manifest itself as inter-group conflict. Therefore, Niebuhr sees society as in a state of constant clash and conflict in a Hobbesian sense. Social/political groups with strength and numerical majority subsume others that lie on the lower levels of socio-political hierarchy. The only way to govern the relations between groups is politics and coercion, and not religious ethics. Both Morgenthau and Niebuhr implicitly share the conclusion that religion should not be integrated into political decision-making processes. In Morgenthau's analysis, religion can be seen as a factor fueling statesmen's prejudices against states with a different religious affiliation,

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[69] Reinhold Niebuhr, *Moral Man and Immoral Society: A Study in Ethics and Politics* (USA: Charles Scribner's Sons, 1932), p. 63.

[70] Ibid., p. 70.

[71] Ibid., p. 76.

which may lead to miscalculated foreign policy decisions. In a similar vein, Niebuhr adopts the Augustinian metaphor of 'city of God' versus 'city of man,' where the latter is and should be governed by the politics of coercion. In that sense, Niebuhr is a realist and defies the role of religion as a problem-solving agent in world politics.

The assumption of 'rationality' in classical realism also deserves a thorough analysis. The lust for power is a constant and interests are a function of power in Morgenthau's theory. However, the question of 'interests' in classical realism stands among the most debated and misconceived issues in the IR literature. Morgenthau's discussion of ethics in international politics can possibly better illuminate the issue of interests in realism. Morgenthau's conception of ethics is informed by Machiavelli's 'political' ethics as opposed to 'private' ethics.[72] The political ethics in a Machiavellian sense is the ethics of responsibility. The ruler should pursue interests that are compatible with the ultimate security of his constituency. Any means to this end is justified, be it peace or war. Machiavellian private ethics, on the other hand, is Christian morality, where Christian ideals of peace, love and compassion are employed for the purposes of a healthy government of societies and policies. Machiavelli argues that a good ruler does not and should not pursue his private Christian ideals, but 'political ethics' to secure the ultimate interests of his people. Morgenthau borrows Machiavellian 'political ethics' and 'ethics of responsibility' in his discussion of Realpolitik in international relations. In an anarchical international system where the states' ultimate interest is survival and security, statesmen should pursue certain hard power objectives. In other words, the 'rationality of interests' is traditionally associated with some easily measurable, 'materialized' objectives in the broader rationalist IR scholarship. As a result, the attainment of military capabilities and hard power stand at the core of classical realism. Classical realists even left out economic objectives from power equation, seeing it as an issue of 'lower politics.'

What is left out in the broader rationalist paradigm is that rational interests can be achieved through the employment of immaterial means/objectives. If religious identity might serve to achieve a foreign policy objective, the statesman can choose to build his policy on religious and ideological affinity with other states. Iran's political and military support for the Shiite government in Syria and Hezbollah in Lebanon might be seen as

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[72] Morgenthau, *Politics Among Nations,* passim.

rational decision to bolster Iran's power position and to balance the heavily Sunni-dominated states in the region. Religion along this line of thought is 'a functional tool' to achieve security and power. The 'substantive' core of religion, i.e. its doctrine, does not play any role in its adoption as a functional tool. Rather, it is the common 'religious identity' that counts as a tool for rational cost-benefit analysis. In other words, religion can be incorporated into classical realism as a functional tool, shaping statesmen's cost-benefit calculations in the process of foreign policy making. The incorporation of religion into classical realism as a functional tool does not challenge the rationality assumption, hence not leading to paradigm degeneration. The functionality of religion in conflict settings is also embraced by Fox in his discussion of ethno-religious conflicts.[73] He argues that there are three paths religion might have an impact on foreign policy making processes. First, religious orientation of policy-makers can determine the types of policies in a conflict situation. Secondly, religion might give legitimacy for support or opposition to the government. And thirdly, it can transform local issues to international issues.[74] Of these, Fox seems to give more weight to legitimacy as the primary function of religion in driving the course of ethno-religious conflicts, which is akin to the instrumentalist logic of classical realism.

While classical realism is open to incorporate religion, structural realism has less of a theoretical space to do so. Structural realism is based on three basic assumptions about world politics: 1) international system as anarchy, 2) states as rational unitary actors, 3) power maximization and/or security as the ultimate goal. In an anarchic international system, states resort to self-help measures to ensure their survival. Structural realists tend to associate self-help with conflictual behavior and competition. There is a general pessimism about the prospects for cooperation in structural realism due to the problem of relative gains and the possibility of cheating. Correspondingly, states constantly vie for military advantages and aver from reducing their military capabilities. The central point of distinction between classical realism and structural realism is the level of analysis though, rather than the possibility for conflict and cooperation. In Waltzian terms, structural realism is a 'third image' theory, which presumes that the

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[73] Jonathan Fox, 'Religion as an Overlooked Element of International Relations,' *International Studies Review* 3, no. 3 (2001): p. 53-73.

[74] Ibid.

attributes of the international structure are the main cause of international conflict.[75] The causes of wars are not rooted in 'human nature' and the individual characteristics, psychology, and perceptions of statesmen, but in the anarchic international structure.[76] Structural theories share the assumption that the sum is more than its parts. Comparably, structural realism argues that the international structure is more than the agents comprising it. The relative distribution of power within the system determines the statesmen's policy decisions.

Structuralist scholars have employed various indicators to measure balance of power within the system. Some scholars focused on the number of great powers within the system, or system polarity.[77] Waltz argued that bipolar systems, where there are great powers with relatively equal capabilities in the system, are easy to manage conflicts and agreements.[78] Bipolar systems are more stable and predictable. As one state increases its capabilities, the other will respond the same way. Adventurism by the client states is mitigated by two great powers who behave as system managers. On the other hand, in systems where there are three or more great powers, dangers are diffused, responsibilities are unclear, and definitions of vital interests are easily obscured. While sharing Waltzian line of thought, Mearsheimer categorizes multipolar systems as balanced and unbalanced multipolarities depending on the existence of a potential hegemon.[79] He further elaborates that a potential hegemon generates spirals of fear within the system, aggravating military build-up and making the system unstable. Some scholars also examined the influence of system polarity on war duration, frequency, severity, and magnitude. Hopf argues that bipolar systems are less severe, less frequent, and less violent compared to multipolar systems.[80] Some other scholars shifted the focus from system polarization to power concentration, i.e. capabilities and size of states, within the system. Siverson and Sullivain

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[75] Waltz, *Man, the State and War: A Theoretical Analysis,* passim.

[76] Waltz, *Theory of International Politics,* passim.

[77] Waltz, 'The Stability of Bipolar World,' passim; Karl W. Deutch and J. David Singer, 'Multipolar Power Systems and International Stability,' *World Politics* 16, no. 3 (1964): p. 390-406; Mearsheimer, *The Tragedy of Great Power Politics,* passim.

[78] Waltz, 'The Stability of Bipolar World,' passim.

[79] Mearsheimer, *The Tragedy of Great Power Politics,* passim.

[80] Ted Hopf, 'Polarity, the Offense-Defense Balance, and War,' *American Political Science Review* 85, issue 2 (1991): p. 475-493.

found that diffuse and even distribution of capabilities is linked to higher occurrence of war.[81] Mansfield found that there is an inverted U-shaped relationship between concentration of power and war.[82] Middle-level concentration is more linked to war. Finally, Glaser argued that the balance between offensive and defensive capabilities will determine the likelihood of conflict or cooperation as a self-help measure in the anarchic international system.[83]

Whether it is system polarization or power concentration, structural realism offers a rather mechanical understanding of foreign policy making. Statesmen do not seem to have many policy options, because the structure is rigid and individual statesmen do not have much control on the structure. Rather, it is the international system that works as a constraint on the statesmen's policy decisions. Moreover, the defining element of the international system is power in a material sense, which is measured by military capabilities. Accordingly, structural realists do not talk about any non-material aspect of the international system, such as ideas and identities, which makes the incorporation of religion into structural realism difficult. However, Sandal and James list a few studies exemplifying some points of intersection between structural realism and religion.[84] They refer to Posen's work (1993) on ethnic conflict, in which they argue that the collapse of the multi-ethnic states leads to a domestic anarchy comparable to international anarchy.[85] Ethnic communities' behavior in a domestic anarchy is also comparable to what states do internationally, such as balancing and employing self-help measures for survival. Posen, in other words, is using the neorealist terminology including balance of power and security dilemma to analyze ethnic conflicts, which might inspire work on religious conflicts as well.[86] Another scholarship Sandal and James refer to is Walt's (1987)

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[81] Randolph M. Siverson and Michael P. Sullivan, 'The Distribution of Power and the Onset of War,' *Journal of Conflict Resolution* 27, issue 3 (1983): p. 473-494.

[82] Edward Mansfield, 'The Concentration of Capabilities and the Onset of War,' *The Journal of Conflict Resolution* 36, no. 1 (1992): p. 3-24.

[83] Glaser, 'Realists as Optimists,' passim.

[84] Nükhet Sandal and Patrick James, 'Religion and International Relations Theory: Towards a Mutual Understanding,' *European Journal of International Relations* 17, no. 1 (2011): p. 3-25.

[85] Posen quoted in Sandal and James, 'Religion and International Relations Theory,' p. 13. Also see Barry Posen, 'The security dilemma and ethnic conflict,' *Survival* 35, no. 1 (1993): p. 27–47.

[86] Posen quoted in Sandal and James, 'Religion and International Relations Theory,' p. 13.

'balance of threat' theory.[87] According to Walt, not only states' power positions, but also their perception of other states' intentions shapes their international behavior. They either balance or bandwagon states that are not only powerful, but also those they perceive to be threatening. Religion can easily be incorporated into this scholarship as a factor shaping threat perceptions. One can hypothesize that religious differences may function as a source of threat for states, which may determine their foreign policy behavior. While these examples may inspire research to incorporate religion into structural realism, this research paradigm makes less room for religion due to its level of analysis. Religion can be incorporated into this paradigm if the concept and the nature of 'international structure' are opened to discussion. However, the concept is taken for granted in structural realism and the studies deconstructing the concept are already within the constructivist paradigm. Therefore, studies analyzing the religious underpinnings of the international system would be expected from the constructivist paradigm.

Structural realism has been largely criticized for the disconnection between the international structure and individual foreign policies of states.[88] As discussed above, structural realism is a mechanical theory of inter-state behavior. Theoretically, the characteristics of the system are the independent variable, automatically determining the likelihood for war or peace. What is lost in this cause-effect relationship is how system polarization or the concentration of capabilities within the system is translated into specific foreign policy decisions. As a result, several scholars calling themselves neoclassical realists brought the state back into the analysis. Neoclassical realism is commonly designated as a 'second image' theory of realism, where states' characteristics act as an independent variable in the analysis. For example, replacing the balance of power with 'balance of interests,' Schweller argues that interests precede power and power is determined upon preferences.[89] His interest-based explanation is further elaborated by his categorization of states according to their preferences and intentions such as jackals, wolves, lions, and lambs. The individual state behavior is determined by these state categorizations. Jackals and wolves pursue a revisionist foreign policy, where

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[87] Walt quoted in Sandal and James, 'Religion and International Relations Theory,' p. 14. Also see Stephen Walt, *The Origins of Alliances* (Ithaca, NY: Cornell University Press, 1987).

[88] See Zakaria, *From Wealth to Power,* passim; and Randall L. Schweller, 'Unanswered Threats: A Neoclassical Realist Theory of Underbalancing,' *International Security* 29, no. 2 (2006), p. 159-201.

[89] Schweller, *Deadly Imbalances,* passim.

they attempt to re-shape the system in accordance with their individual preferences. Lambs and lions are, on the other hand, status-quo states, which benefit from the current functioning of the system. In a similar vein, Van Evera brings perceptions and misperceptions by statesmen of interaction with other states as a factor shaping foreign policy.[90] War is more likely when there is a perception of diplomatic threatening, hostility, windows of vulnerability, or the belief that conquest is easy.

Neoclassical realism as a second-image theory might open a fertile research outlet for religion. One possibility would be examining the conflict behavior of individual states or dyads with varying religion-state relations. Fox' work on the configurations of religion and state can be informing in this respect.[91] Fox attempts to re-conceptualize the relations between religion and government across 175 cases by examining multiple indicators such as the presence of an official religion, preferential treatment of certain religions, the treatment of religious minorities, and the government regulation of the majority religion. The result is a composite index of 'government intervention to religion' (GIR), collected from data on countries between 1990 and 2002.[92] Fox finds that multiple types of secularism exist across the modern world and he supports his thesis with individual case studies. Fox' dataset can be used to examine whether a specific type of GIR is more highly correlated with conflict behavior than others. Fox does not apply GIR to the study of conflict patterns within realism, although he produced an influential body of scholarship on religious conflicts within the liberalist paradigm.

Independent from its level of analysis, the realist paradigm is ontologically rationalist and epistemologically positivist. To reveal the rational law-like regularities among phenomena, realist scholars have largely turned to empiricist epistemologies with large-N quantitative methodologies. In the recent years, scholars working on religion within the rationalist and positivist paradigms including realists have collected large datasets to gauge the relationship between religious identity and conflict patterns. Maoz and Henderson introduce the World Religion Data under the Correlates of War Project,

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[90] Stephen Van Evera, *Causes of War* (Ithaca: Cornell University Press, 1999).

[91] Jonathan Fox, 'World Separation of Religion and State into the 21st Century,' *Comparative Political Studies* 39, issue 5 (2006): p. 537-569.

[92] Ibid.

which classifies religions and religion families and provides information about the number of followers for each classification.[93] Maoz and Henderson also reveal descriptive statistics on religious similarity, conflict and alliance patterns. They find that religiously similar dyads have a higher probability of forming alliances when compared to dyads with dissimilar religions.[94] In a similar vein, religiously similar states are more likely than religiously dissimilar ones in committing to their alliances.[95] A surprising note though is that the probability of conflict between religiously similar dyads is not very different than religiously dissimilar dyads.[96]

Some major large-N studies examining the relationship between religion and conflict were produced within the realist paradigm on a variety of themes. Fox (2005, 2007) and Fox and Sandler (2004) tries to test Huntington's 'clash of civilization' theory across his religion and conflict dataset, and finds that wars are not driven by civilizational differences as Huntington claims but by religious differences.[97] If it were driven by civilizational differences, we would see a heightened amount of conflict among states, but a majority of the conflicts are in the post-Cold War period. Finding a religious pattern in the nature of conflicts, Fox also studies whether some religions are more conflict-prone than others.[98] The increasing number of conflicts in the MENA region as well as the rise of Islamic fundamentalism has created an image of Islam being more conflict-prone than other religions. Fox refutes this image to a certain extent with his findings are Christians are more involved in conflicts, while Muslims enter more intra-religious conflicts compared to their proportion size.[99] The domestic and intra-state nature of conflicts worldwide has moved the scholars of religious conflict towards the study of ethnic

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[93] Zeev Maoz and Errol A. Henderson, 'The World Religion Dataset, 1945-2010: Logic, Estimates, and Trends,' *International Interactions* 39, issue 3 (2013): p. 265-291.

[94] Ibid., 287-288.

[95] Ibid.

[96] Ibid.

[97] Jonathan Fox, *Religion, Civilization, and Civil War: 1945 Through the New Millenium* (Oxford: Lexington Books, 2005); Jonathan Fox, 'The Rise of Religion and the Fall of the Civilization Paradigm as Explanation for Intra-State Conflict,' *Cambridge Review of International Affairs* 20, issue 3 (2007): p. 361-382; Jonathan Fox and Schmuel Sandler, *Bringing Religion into International Relations* (New York: Palgrave Macmillan, 2004), Chapter 6.

[98] Jonathan Fox, 'The Rise of Religious Nationalism and Conflict: Ethnic Conflict and Revolutionary Wars, 1945-2001,' *Journal of Peace Research* 41, issue 6 (2004): p. 715-731.

[99] Ibid.

conflicts and hence the liberalist paradigm. Fox et. al. examined the states' behavior of intervention into ethnic conflicts elsewhere and finds that Islamic states are more likely to intervene into other states where religious minorities are at risk.[100] Similarly, Toft analyzes the relationship between religion and civil wars. She finds that 30 % of civil wars between 1940 and 2000 are rooted in religion and religious civil wars are more violent and prolonged than non-religious ones.[101] Toft argues that the type of the religious belief matters, as most religious civil wars happened in the Islamic societies. The quantitative analysis of religion found its place also Toft, Philpott, and Shah's study on diverse empirical themes of the 21st century including inter-religious and intra-religious civil wars and mediation by religious actors.[102]

While revealing correlations and patterns between religion and other phenomena, the large-N quantitative analysis of religion, the realist scholarship of religion and conflict does not necessarily explain what role religion plays in these conflicts. Notwithstanding the rationalist ontology of the realist scholarship seems to bode well with the instrumentalist accounts of religion, where religion is used as a tool for justifying other non-religious, often political, economic, and military concerns. According to the realist logic, a state can instrumentalize its religious affiliation with minorities in another state to justify its military and political intervention there. In a similar vein, a state may refer to religious doctrinal reasons for arming religious non-state actors with similar religious affiliation. The substantive core of religion, including the religious belief, doctrine and law, does not become the primary reason for religious foreign policy. However, how religion influences world politics is a matter of discussion even for some rationalist scholars. Fox and Sandler argue that religion can influence foreign policy in several ways.[103] First, religion can act as an identity, but Fox and Sandler argue that the scholarship subscribing to religion as a source of identity argument is not clear on how

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[100] Jonathan Fox, Patrick James, and Yitan Li, 'Religious Affinities and International Intervention in Ethnic Conflicts in the Middle East and Beyond,' *Canadian Journal of Political Science* 42, issue 1 (2009): p. 161-186.

[101] Monica Toft, 'Getting Religion? The Puzzling Case of Islam and Civil War,' *International Security* 31, no. 4 (Spring 2007): p. 97–131.

[102] Monica Toft, Daniel Phillpott, and Timothy Samuel Shah, *God's Century: Resurgent Religion and Global Politics* (New York: W. W. Norton & Company, 2011).

[103] Jonathan Fox and Schmuel Sandler, 'The Question of Religion and World Politics,' *Terrorism and Political Violence* 17, issue 3 (2005): p. 293-303.

that identity influences policies specifically.[104] In other words, what makes religion different from an ethnic and national identity is not clearly defined by this scholarship. Some scholars focus on religion's potential to provide a secure identity to the individual,[105] some others highlight religion's influence on justifying certain ethnic and national ambitions,[106] yet others emphasize religious identities per se for the rise of religious fervor as in the case of religious terrorism.[107] Secondly, religion as a belief and faith system and the level of religiosity can motivate followers for a religious foreign policy.[108] Thirdly, religious doctrines and theology can motivate policy-makers to adopt them for justifying specific policies.[109] The differentiation between influence of religious belief and of doctrines is that most religions contain multiple and often contradictory doctrines among which policy-makers choose the most relevant ones in justifying their specific actions. As such, while religious the substantive core of religion drives the foreign policy, the specifically chosen doctrines among many others become a tool for justifying non-religions policy concerns.[110] Religious institutions are another source of influence, where they can either help mass mobilization or act as an authority.[111] The final influence of religion, which Fox and Sandler highlight the most among all, is its legitimization capacity.[112] Religion can be instrumentalized by policy-makers to justify any kind of policy. Religion as a justification tool seems to be embraced as an assumption, rather than as a hypothesis to be tested across empirical data, within the rationalist scholarship due to the ontological premises of this paradigm. Most of the large-N quantitative realist scholarships listed above do not seek to test hypotheses about the different functions of religion in foreign policy making though. Upcoming research on

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[104] Ibid., p. 294.

[105] See Jeffrey R. Seul, 'Ours is the Way of God': Religion, Identity, and Intergroup Conflict,' *Journal of Peace Research* 36, issue 5 (1999): p. 553-569.

[106] See David Little, 'Belief, Ethnicity, and Nationality,' *Nationalism and Ethnic Politics* 1, issue 2 (1995): p. 284-301.

[107] See Scott Appleby, *The Ambivalence of the Sacred: Religion, Violence, and Reconciliation* (New York: Rowman and Littlefield Publishers, 2000).

[108] Fox and Sandler, 'The Question of Religion and World Politics,' p. 295.

[109] Ibid.

[110] Ibid.

[111] Ibid.

[112] Ibid.

religion within the realist paradigm should go beyond merely tracing correlations between religious affiliation and conflict behavior and examine the functions of religion in policy-making processes.

Besides realism's shortcoming for explaining why and/or under what conditions religion becomes a tool, its basic assumptions can also be questioned with an attempt to open a theoretical space for the study of religion within this paradigm. Rationality assumption deserves an in-depth discussion for being the most uncompromising assumption towards religion. Rationality is one of the most misunderstood concepts in social analyses. Within rational-choice scholarship, which has informed most scholarship within realism and liberalism, rationality means that actors have fixed set of preferences, and they act strategically and instrumentally to maximize the chances of attaining their preferences. The relationships among actors is a strategic game, which is informed by the context within which they are acting, other actors' preferences and preference ordering, and their level of information thereupon. Rational choice theory does not dwell on the content of the preferences though; the nature and the characteristics of the preferences are left untouched. Rationality in this sense is a decision-making methodology only, cost-benefit calculus being the core of this methodology. However, realism has tended to attach a specific content to rationality informed upon its specific ontology while adopting rational-choice theory. Accordingly, realist scholarship has often equated rationality with political, economic, and military benefits. The realist scholarship ignored the possibility that the milieu of strategic interaction could be influenced by ideas, perceptions and identities of the specific actors involved in the game. In a similar vein, the preferences can also be influenced by the ideas, perceptions, and identities of the actors. If rationality is a decision-making methodology rather than a content, then the classical and neo-classical variants of realism can study how religious ideas and identities can influence the interaction-setting, preference orderings, and their behavioral outcomes.

Another concept to be analyzed in relation to religion is the very concept of 'power.' Power in the realist thinking is predominantly associated with material capabilities. The size of a state's military capabilities can determine a state's power position in the international system, the distribution of power, and alliance patterns according to the classical realist and neorealist logic. Ideas and ideologies are often left out of the calculations of 'power' though. If ideas, beliefs, ideologies are found to be

relevant for state behavior, their influence is deemed to be 'soft' at best and is often covered by Nye's concept of 'soft power.' Realists might tend to see religion as a soft power in international politics; however, the rising relevance of religion in the international scene in the last couple of decades shows that the power of religion is more than 'soft.' The political transformations sweeping the world for the last forty years are political revolutions with religious contours or religious civil wars, which is far from being 'soft.' To the contrary, religion might act as a 'hard power' in a number of ways. First, the influence a state derives from ideas, beliefs, norms, and ideologies can outweigh its power derived from military capabilities. For example, a state might exert more influence over another state by supporting co-religionists than by threatening through missile capabilities. Secondly, the power of ideas can be translated into military power as well. The religious beliefs and narratives about 'the right socio-political order' can help mobilize populations for the purposes of establishing that order. Religion is translated into 'hard power' when this mobilization has a military nature. The rise of religious armed groups is a case in point here, where either the threats to a specific religious identity become a motivation for armed mobilization, or the motivation to establish 'a right order' as specified by a faith tradition may be the driving factor for the establishment of powerful ideological armies. Thirdly, sharing a common religion may be a motivating factor for forging alliances. Alliances with co-religionist states and non-state actors can augment a state's power in international politics. In short, despite the non-accommodative attitude of realism towards religion, the integration of this concept into the study of various IR assumptions and concepts such as power, rationality, and alliances can open up a fertile research area studying the recent developments in international politics.

2.3. Religion and Liberalist Paradigm

The liberalist international relations paradigm is often depicted as the continuation of idealism/utopianism. Like idealism, liberalism is more optimistic about world politics compared to realism. It holds that world politics is not exclusively about conflict and security and that peace is achievable. The relations among states are not only about the attainment of military prowess, but economics also play a major role in shaping inter-state interactions. States need both military capabilities and economic development to

ensure their survival. The destructive capacity of war often poses a threat to economic development. Therefore, the cost of war might be more than its benefits under certain circumstances, making it a not-so-feasible self-help tool to employ. Moreover, states are more interdependent than ever in an economically interconnected and highly globalized world. Therefore, a conflict in one part of the world also has the potential to disrupt the processes of economic development and security in other regions. What follows is that cooperation is not impossible and there is ample room for inter-state cooperation within the system.

Like realism, liberalism also sees states as primary actors of international politics. However, following idealism's emphasis on the League of Nations, liberalism also gives considerable attention to non-state actors. Inter-governmental organizations, international non-governmental organizations, multinational corporations, individuals, political elites, domestic political parties, etc. are extensively studied with respect to their role in conflict and cooperation by liberalist scholars. Despite such distinguishing characteristics, it is difficult to talk about a homogenous list of liberalist assumptions and propositions though. Liberalism is perhaps the most eclectic IR paradigm embodying diverse assumptions, propositions, and topics of study. Liberalist paradigm has generated a very diverse area of research including theories of international cooperation, institutionalism, globalization, transnationalism, integration, process-based decision-making, democratic peace, and complex interdependence among others. Two liberalist theories worth mentioning with respect to religion are neoliberal institutionalism and foreign policy decision-making models.

Neoliberal institutionalism is a structural and strategic theory of international cooperation. Like structural realism, neoliberal institutionalism is also a third image theory. It shares structural realism's assumption that international system is anarchic and the anarchic international system shapes individual states' behavior. Oye observes that cooperation among states in such a system is more prevalent than conflict and explains how cooperation is possible and can be made possible in an anarchic system.[113] He argues that international interaction is not a one-shot game but an iterated one. There is an

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[113] Kenneth Oye, 'Explaining Cooperation Under Anarchy: Hypotheses and Strategies,' *World Politics* 38, issue 1 (1985): p. 1-24.

expectation for future interaction, i.e. 'the shadow of future,' which increases the chances for present cooperation. He extensively employs a game-theoretical language to detail how the cost-benefit calculation determines the moves in this strategic interaction. Like structural realism, neoliberal institutionalism is also a rational theory of international interaction. Keohane argues that it is not norms, ideas, or identities that drive states towards cooperation.[114] Rather, cooperation should be understood as an extension of individual self-interest calculation. In a liberal contractarian sense, inter-state contracts are possible when the benefits of cooperation surpass its costs. This is also where the role of international institutions enters in calculation. While states are still the primary actors of international interaction, international institutions increase the chances of cooperation by shaping the cost-benefit analysis. Grieco argues that institutions reduce verification costs, create iterativeness, and make the punishment of cheaters in the international system.[115] In other words, regimes make it more rational to cooperate by lowering the likelihood of being double-crossed. International regimes do not substitute for reciprocity; but they reinforce and institutionalize it.

At first sight, the neoliberal institutionalist logic seems to make little room for the incorporation of religion into this research program. Liberal contractarian logic seems to overwhelm the program's approach towards institutions. International cooperation and regime formation are seen from the lens of rational self-interest, constant game, and bargaining. Like structural realism, interests are assumed to be material, either in a military or economic sense. Therefore, religious norms and identities could not find a theoretical space in the writings of neoliberal institutionalist scholars. Nevertheless, some scholars have emphasized that norms and perceptions can change the contextual logic of interaction. Axelrod and Keohane's study reconciling structuralist accounts of cooperation with a contextual understanding is informing in this respect.[116] They argue that factors such as the number of players within the system, the pay-off structure, and the shadow of the future shape the structure in which cooperation will occur. However,

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[114] See the rationalist approach to international cooperation, Robert O. Keohane, 'International Institutions: Two Approaches,' *International Studies Quarterly* 32, issue 4 (1988): p. 379-396.

[115] See Joseph Grieco, 'Anarchy and the Limits of Cooperation: A Realist Critique of the Newest Liberal Institutionalism,' *International Organization* 42, no. 3 (1988): p. 485-507.

[116] Robert Axelrod and Robert O. Keohane, 'Achieving Cooperation under Anarchy: Strategies and Institutions,' *World Politics* 38, issue 1 (1985): p. 226-254.

the possibility of cooperation between two states within this structure is further impacted by the context of norms and perceptions of institutions. In a similar vein, Axelrod incorporates cognitive processes into his later research on why some institutions decay, while others flourish.[117] He argues that the psychological factor of 'boldness' is the key factor for defection, while 'vengeance' is the key for punishing those defectors. There is an inverse relationship between vengeance and boldness, as when vengeance rises, boldness drops. However, vengeance comes with the cost of enforcement. When enforcement cost is high, vengeance drops and boldness increases, leading to norm decay. Axelrod and Keohane's contributions to neoliberal institutionalist logic with the inclusion of norms, perceptions, and cognitive processes can open up a space for the study of religion within this research program. For example, institutionalist scholars can study the role of transnational religious actors such as The Catholic Church or The Organization of Islamic Conference (OIC) in shaping conflict and cooperation likelihood. A research on how OIC can shape the cost-benefit calculation of its members in their interaction with one another through shared Islamic identity can be a contribution to the literature.

Some neoliberal concepts can directly relate to the study of religion. One such concept is Nye's 'soft power,' by which he means influencing the preferences of others by the use of non-material means.[118] A state's soft power can rest on three sources: culture, political legitimacy, and moral authority.[119] A state can use these sources to achieve the foreign policy objectives it aims to achieve. The concept of soft power is not limited to states though, and it can theoretically be generalized to the study of non-state actors. For example, transnational religious actors such as The Catholic Church, the Organization of Islamic Conference, and terrorist networks such as Al-Qaeda and ISIL can be analyzed with respect to their legitimacy, authority and influence on states and other non-state actors. Recently several domestic Islamist groups in different Middle Eastern states have paid allegiance to ISIL, which can be analyzed with the concept of soft power within the neorealist logic. Haynes' work on transnational religious actors and soft power is an important contribution to the study of religion within neoliberal paradigm

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[117] Robert Axelrod, 'An Evolutionary Approach to Norms,' *The American Political Science Review* 80, issue 4 (1986): p. 1095-1111.

[118] Joseph Nye, 'Soft Power,' *Foreign Policy* 80 (1990): p. 153-171; Joseph Nye, *Soft Power: The Means to Success in World Politics* (New York: Perseus Books, 2004).

[119] Nye, *Soft Power: The Means to Success in World Politics,* p. 11.

in this context.[120] Haynes examines several transnational religious actors including American Evangelical Protestants, Roman Catholics, the Organization of the Islamic Conference, Sunni fundamentalist groups such as al-Qaeda and Lashkar-e-Taiba, and transnational Shia networks such as Hezbollah with respect to their role in international politics. Haynes concludes that these actors attempt to use their religious identity and ideology to achieve their political ends. Their employment of religious soft power has a transformative effect on the international order.

While neoliberalism can make room for the study of religion as discussed above, its emphasis on the structure and rationality assumptions restricts the range of this research. Like structural realism, neoliberal institutionalism sees the international structure as one of anarchy. The structure is operationalized on material terms, i.e. the distribution of military and economic power. Ideational factors such as religion have no role in the ordering of this structure. This partly follows from an assumption shared by structuralist IR theories that international and domestic realms are separate from one another and religion belongs to the domestic realm in the modern understanding of the international system. However; another brand of liberalism transcends this assumption of domestic-international separation and focuses on the linkage between these two realms instead. Referred to as linkage politics, this brand of liberalism examines how domestic characteristics of states and the order of the international system often interacts with one another to shape foreign policy processes.

Putnam's 'logic of two-level games' is the highlight of this scholarship, where he assumes that states are not unitary actors and decision-makers are constrained by both domestic and international pressures simultaneously.[121] Foreign policy decisions on waging wars, forming of alliances, and signing of treaties is the result of a bargaining process both at the international and domestic level. Putnam demonstrates that the chief negotiators are engaged in a two-level game. In Level 1, bargaining takes place among chief negotiators at the international level. In Level 2, the discussions take place within each constituency whether the agreement should be ratified and if it is to be ratified under what terms. Putnam contends that any agreement at Level 1 should fall inside Level 2

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[120] Jeffrey Haynes, *Religious Transnational Actors and Soft Power* (Surrey: Ashgate Publishing, 2012).

[121] Putnam, 'Diplomacy and Domestic Politics: The Logic of Two-Level Games,' passim.

win-sets of each of the parties to the bargaining process. The size of the win-sets in each party to the accord matters. The larger the win-set, the better the chances are for reaching an agreement since a smaller win-set may cause what Putnam calls as involuntary defection, i.e. chief negotiators' inability to deliver a bargain due to difficulties at the second level. The larger the win-set of one party relative to the other, the higher the chances are to be pushed around by other Level 1 negotiators. Moreover, a smaller win-set relative to your opponents can be a relative advantage. This last point implies that democratic governments have an upper hand in international negotiations, as the multiplicity of domestic actors in democratic polities constrains the chief negotiator, who in turn can use these constraints to further push for his position at the international level.

Allison's bureaucratic politics model is another landmark theory of second-image liberalism, which he employs in analyzing the Cuban missile crisis. According to Allison 'each national government is a complex arena for intra-national games,' where 'the decision maker of national policy is not one calculating individual but rather a conglomerate of large organizations and political actors.'[122] It is the ongoing bargains, tugs-of-war and struggles amongst formal actors that ultimately affect a state's foreign policy. Allison argues that 'most of the players participate in foreign policy decision making via their roles' and positions in the government.[123] The particular positions define the players' preferences, interests, capabilities and responsibilities. Therefore, it becomes natural for actors to bring the perspectives and interests of their own organization or position.[124] There are three analytically distinguishable factors that shape a player's perceptions, preferences and standpoints. First, actors have parochial priorities which make them sensitive to their organization's interests and orientation.[125] Second, personal and domestic interests play an important role in making decisions on foreign policy issues.[126] Third, stakes are shaped by each player's understanding of what the national or organizational interest might be. The domestic-level interest formation and conflicts of interests generate foreign policy outcomes.

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[122] Allison, *Essence of Decision*, p. 255.

[123] Ibid., p. 256.

[124] Ibid.

[125] Ibid., p. 298.

[126] Ibid.

The logic of two-level games and the bureaucratic politics tradition as examples of second-image liberalism might seem to generate a more fertile research outlet for the study of religion compared to neoliberal institutionalism. However, the inherent secularism of the liberalist paradigm manifests itself also in its second-image brand. Second-image liberalism is theoretically rooted in one track theory of modernization, which assumes that the rationalized bureaucratized state, capitalist market, liberal economy will be accompanied by secularization. Adopting the Western model of modernization, liberalism sets itself apart from the intricacies of multiple modernities. Nevertheless, a few scholars of religion and IR have produced influential work within this domain. In his study of under what conditions domestic religious actors resort to democratic means or violence, Philpott argues that the type of secularism, i.e. the institutional arrangement of church-state relations is a determining factor.[127] He categorizes church-state relations as 'high-differentiated' versus 'low-integrationalist' in degree, and as 'consensual' and 'conflictual' in kind. Accordingly, in high-differentiated societies there can be high levels of violence if the relationship between the church and the state is conflictual such as in Communist Poland and Kemalist Turkey. However, if the relationship between the two is consensual, the likelihood of resorting to democratic methods increases as in the USA. In the same scholarship, Philpott also introduces the concept of 'political theology,' which he defines as 'a set of ideas that a religious authority holds about legitimate political authority.'[128] Political theology approach asks such questions as who possess the political authority in a polity, what are the obligations of the state in advancing justice and promoting religious faith, and what religious believers should do for the state.[129] Philpott's political theology approach is a rather actor-based theory and it seeks to understand how the ideas of religious and non-religious actors about the church-state relationships might influence policy making processes. There are multiple ways how political theologies might come into existence. An actor with a specific political theology such as Islamic *Sharia,* might change the institutional arrangement of church-state relations after coming to power. Alternatively, a religious group might develop their political theology after achieving political and institutional power. Political theologies might also be rooted in centuries old ideational and political

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[127] Daniel Philpott, 'Explaining the Political Ambivalence of Religion,' *APSR* 101, no. 3 (2007): p. 505-525.

[128] Ibid., p. 507.

[129] Ibid.

processes. In either case, religious ideas and institutions are in constant interaction, shaping the policy outcomes. Philpott's political theology approach can be employed in examining states and/or sub-state religious actors' patterns of alliance formation with religious fundamentalist groups elsewhere. Why do some states sponsor ISIL and the fundamentalist opposition groups in Syria while others do not? Similarly, political theology approach can also help liberalist IR scholars tract the changes in states' general foreign policy orientations after religious political parties assume power.

Another line of research connecting second-image liberalism with the study of religion is the study of foreign policy making processes. Warner and Walker develop an ambitious foreign policy model depicting the role of religion in foreign policy making. Warner and Walker treat religion not as an individual factor, but rather as a 'framework.'[130] This framework consists of six conceptual boxes borrowing from liberalism, realism, constructivism, and institutionalist theory: geopolitical position (power); domestic culture or heritage (ideas and culture); public opinion, interest groups and parties (interests); and organizations and state structures (institutions). Geopolitical position might either influence institutions and interests, indirectly shaping foreign policy decisions, or directly determine foreign policy decisions. Ideas and culture has a similar weight on interests and institutions. However, the causal arrow runs both ways, as the institutional setting and public opinion can also shape religious ideas, which might in turn be translated into foreign policy decisions. Warner and Walker argue that the causal arrows transmit information 'about the appropriate actions to take based on religious beliefs about human nature, society, and the world.'[131] In other words, the transmitted information about religion provides guidance for political ethics in that context.[132] Foreign policy decision-makers take this piece of information and metamorphose it into actual foreign policy decisions. In the rest of the study, Warner and Walker use this framework to theoretically integrate religious foreign policy decisions into realist, liberalist and constructivist paradigms.

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[130] Carolyn M. Warner and Stephen Walker, 'Thinking about the Role of Religion in Foreign Policy: A Framework for Analysis,' *Foreign Policy Analysis* 7, issue 1 (2011): p. 113-135.

[131] Ibid., p. 118.

[132] Ibid.

Although not theoretically well-informed, Helfont takes an implicitly liberalist approach in analyzing Saddam Hussein's instrumentalizaton of Sunni Islam in foreign policy making.[133] He argues that despite his secular orientations at the domestic political level, Saddam Hussein pursued religious diplomacy for the purposes of national security and regime security during Iran-Iraq War. To attract other Sunni Middle Eastern states' support against sanctions imposed on Iraq during the war, Saddam established favorable relations with the Muslim Brotherhood of Syria, Egypt, and Jordan. Due to lack of diplomatic relations with Saudi Arabia, Saddam engaged in religious diplomacy with Saudi clerics and religious communities.

Another fertile area of research to integrate religion into the liberal research paradigm is new wars scholarship. While scholarly analyses of conflict behavior indicate a decline in the prevalence of inter-state wars, intra-state wars have increased. The main reason for the increase in this new type of wars is state failure and/or the breakdown of political/public authority. What differentiates the nature of intra-state wars from inter-state ones is the number and the type of actors involved. While states are the main actors of inter-state wars, a wide range of actors including non-state actors, warlords, and terrorist groups perpetuate and/or prolong the war. Newman argues that such a variety of actors create multiple motives for the emergence of these conflicts such as political economy, identities, political ideologies, and religion.[134] These actors often act with the motivation of prolonging the war, rather than finishing it, because they benefit tremendously from new war economies such as the economies of plunder, illegal economies and black market. Goldewijk merges the new war scholarship with religion on the basis of human security.[135] A majority of new wars are identity-based wars such as ethnic and religious conflicts. The ethnic and/or religious nature of these conflicts aggravates their human security aspect. Deliberate targeting of civilians, forced human displacement, and civilian victimization such as rape and ethnic cleansing pose serious threats to human security due to their religious identification.

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[133] Samuel Helfont, 'Saddam and the Islamists: The Baathist Regime's Instrumentalization of Religion in Foreign Affairs,' *Middle East Journal* 68, no. 3 (1984): p. 352-366.

[134] Edward Newman, 'The 'New Wars' Debate: A Historical Perspective is Needed,' *Security Dialogue* 35, issue 2 (2004): p. 173-189.

[135] Belma Klein Goldewijk, 'New Wars and the State: The Nexus Religion- Human Security,' in *Human Security and International Insecurity,* eds. Georg Frerks and Berma Klein Goldewijk (Wageningen: Wageningen Academic Publishers, 2007).

The branch of liberalism that transcends the assumption of domestic-international divide is a promising paradigm for a theoretically informed study of religion in international relations. While the liberalist paradigm has long evaded the study of religion due to its secularist bias, the very integration of religion into liberalism with the study of religious identities, religious conflicts, and religious actors can greatly enrich this paradigm.

2.4. Religion and Constructivism/Post-Structuralism

Contrary to its realist and liberalist counterparts, constructivism might be acclaimed as a more accessible theoretical environment for the study of religion due to its reception of norms, ideas, identities, and culture in international politics. While this might hold true to a certain extent, the earliest constructivist writings also share a basic bias that the whole international relations scholarship is based on: the secular Westphalian bias. This bias is visible even in the most central brand of constructivism, the Wendtian constructivism, which problematizes the givenness of anarchy, rational interests and power politics of the Westphalian system.[136] In his discussion on the constructed nature of anarchy, Wendt criticizes the realist paradigm for treating the anarchic international system as given and the identities and interests of agents as exogenous. Wendt claims instead that the international system cannot be thought as separate from the agents comprising it. While the nature of the system constrains the behavior of states and foreign policy decision makers as the agents of interaction, the agents perpetuate the system by constantly observing the international rules of the game.

Wendtian understanding of the basic assumptions of international politics is not very different from that of rationalist paradigms. Wendt acknowledges the basic tenets of Westphalian system 1) that autonomous, sovereign, and equal nation-states are the primary constituents of the international system; 2) that states interact with one another in an

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[136] Wendt, 'The Agent-Structure Problem in International Relations Theory,' passim; Wendt, 'Anarchy is What States Make of It: The Social Construction of Power Politics,' passim.

anarchic system where there is not central authority regulating that interaction; 3) which makes balance of power, self-help, rationality the rules of the game. Wendt diverges from the rationalistic theories with his dynamic understanding of the international system though. While Westphalian nation-states, anarchy, self-help, and rationality constitute the underlying features of world politics, it is only historically so. What keeps this ontology intact is not the material configuration of the system, but the ideas and perceptions regarding the functioning of the system. The agents' ideas, beliefs, and attitude towards the system perpetuate its continuity. Other constructivist scholars elaborate on how exactly these ideas can shape the international system and the nature of interaction therein. Kratochwil argues that rules, norms, and ideas are constitutive of the game setting.[137] Norms and rules determine several components of international interaction including who the actors are, what rules those actors are obligated to follow for certain political ends, and what strategies they should devise. Accordingly, norms and identities can shape the inter-subjective meanings of rationality, interests and preferences. Norms and identities also shape inter-subjective understandings of international structure, which does not exist a priori. Kratochwill contends that political action is a rule-governed activity and as the rules change, so do the actors, structure, and strategies.[138]

Despite its strong emphasis on the constitutive role of rules, ideas, and identities, the classical constructivist scholarship has not studied the role of religion in international politics. In analyzing different types of international anarchy, Wendt fails to problematize religion either. Wendt categorizes three types of international anarchy: Hobbesian culture of conflict, Lockean culture of self-interest, and Kantian culture of mutual non-violence.[139] These three different understandings of international anarchy have found their place in realism, neoliberalism, and democratic peace scholarships respectively. However, all three types are deeply ingrained in the idea of secularism, which does not make any room for the constitutive role of religion. The most important step to problematize the constitutive role of religion on international relations is taken by Philpott, who argues that modern international relations is not secular as the modernist

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[137] Friedrich Kratochwil, 'The Embarrassment of Changes: Neo-Realism as the Science of Realpolitik without Politics,' *Review of International Studies* 19, no. 1 (1993): p. 63-80.

[138] Ibid., p. 80.

[139] Wendt, *Social Theory of International Politics,* passim.

paradigm assumes and its current configuration is rooted in the Protestant Reformation.[140] The Protestant Reformation and the ensuing religious wars in Europe created a new political system which is sovereign and autonomous over territorial units with fixed boundaries. This new political system, i.e. the nation-states, became the primary agent of the current international system. Philpott argues that if it were not for the Treaty of Westphalia in the aftermath of the European religious wars, the 'shifts in economic and organizational structures, in trade, class, societal coalitions, wealth, technology, military might, the institutions of domestic coercion, and the international balance of power' leading to the current state system would not be possible.[141] The nation-state system gradually dictated the current patterns of law, conflict, peace, and commerce in international politics.[142] The assumed secularism of international politics is also attributed to the Westphalian Treaty, which ruled that the religious identity and law will be accredited by the sovereign over a specific territorial unit, thereby restricting the relevance and influence of religion to the domestic realm only. The sharp separation of domestic and international realms in the dominant international relations theories is the reason for IR's lack of interest in religion.

One theoretically informed constructivist thesis built on Philpott's thesis and worth mentioning is Hurd's work on the politics of secularism in international relations.[143] After convincingly arguing that the modern secular world has a religious foundation already, she problematizes the singularity of secular trajectories. Accordingly, Hurd makes the point that Western notion of secularism has two empirical variants. The first is laicism, which creates two distinct realms as politics and religion and expels religion from the political arena. The second is Judeo-Christian secularism, which does not make any attempt to expel religion, but sees it as part of the socio-cultural life. States embracing any of these two trajectories tend to exhibit different foreign policy behaviors. Hurd shows that American foreign policy towards Iran is not secular, but informed by the Judeo-Christian secular tradition. Alternatively, the European Union, which embraces the

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[140] Daniel Philpott, '*The Religious Roots of Modern International Relations*,' p. 206-245.

[141] Ibid., p. 207.

[142] Ibid., p. 208.

[143] Hurd, *The Politics of Secularism in International Relations, passim.*

laicist tradition, formulates a foreign policy towards Turkey on the basis of its laicist credentials.

More recent scholarship in the constructivist paradigm brings a more critical perspective to the study of religion in international politics by problematizing the concept of "religion' itself. As Fitzgerald argued elsewhere, the concept of religion is a construction of liberal modernity and its liberal-modern definition as the binary opposite of what is profane or what falls outside of the secular domain is not applicable to all societies and cultures.[144] Accordingly, several IR scholars have turned their attention to conceptual developments in other disciplines such as theology, philosophy and sociology. Sandal introduces the concept of "public theologies' for a replacement of "religion' in the study of international politics.[145] Public theology refers to the practical implications of religious doctrine on non-religious spheres of life including the politics, economics and society through human interpretation of religious faith and doctrine.[146] Contrary to the presumably static nature of religious doctrines, the concept of public theology is more dynamic. Public theology embraces the historical, temporal and spatial circumstances in which religious faith and doctrine might manifest itself in institutional, political, social, and economic processes.[147] Sandal attributes this dynamism to agents' perception of religious doctrine, which might change across time and issue areas.[148] In the sphere of politics, a specific public theology might be produced and institutionalized by the religious authority, informed to the public and political authority, and influence politics including conflict, protest, and governmental processes.[149]

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[144] Timothy Fitzgerald, *Religion and Politics in International Relations* (New York: Continuum, 2011).

[145] Nükhet Sandal, 'The Clash of Public Theologies?' *Alternatives: Global, Local, Political* 37, no. 1 (2012): p. 66-83.

[146] See Linell E. Cady, 'A Model for a Public Theology,' *The Harvard Theological Review* 80, no. 2 (Apr., 1987): p. 193-212; Max L. Stackhouse, *Public Theology and Political Economy: Christian Stewardship in Modern Society* (Lanham: University Press of America, 1991); Robert Benne, *The Paradoxial Vision: A Public Theology for the 21st Century* (Minneapolis: Augsburg Fortress Publishers, 1995); Victor Anderson, *Pragmatic Theology: Negotiating the Intersections of an American Philosophy of Religion and Public Theology* (Albany: State University of New York Press, 1998); Philip Ziegler, 'God and Some Recent Public Theologies,' *International Journal of Systematic Theology* 4, no. 2 (2002): p. 137-155.

[147] Sandal, 'The Clash of Public Theologies?,' p. 69.

[148] Ibid.

[149] Ibid., p. 70.

Sandal adopts the concept of public theology in another work where she examines the role of religious actors in conflict transformation in North Ireland and South Africa.[150] Her second contribution to the constructivist scholarship on religion is her adoption of Haas' 'epistemic communities' in analyzing the role of religious actors.[151] An epistemic community in political science is a network of professionals who has a knowledge and expertise and share a set of normative beliefs on political processes. In more concrete terms, technocrats, bureaucrats, and diplomats are traditionally seen as a part of the epistemic community. Policy-relevant knowledge producers such as academics and policy researchers also form an epistemic community. Sandal argues that the body of people comprising the epistemic community indicates the conceptual bias for the modern understanding of knowledge as rational and scientific.[152] Religious actors, theologians, institutions, and authorities with religious knowledge and expertise can also comprise an epistemic community though. Sandal argues that *exegesis* –the critical interpretation of religious texts- and *hermeneutics* – the constitutions of guidelines for interpretation- that is acquired during religious training is what makes faith leaders recognized experts on different issue areas.[153] Faith leaders as epistemic communities might adopt different public theologies depending on the time and issue area. Sandal shows that both South African and Irish faith leaders have transformed their exclusive public theologies on the South African apartheid regime and the Irish religious conflict to an inclusive one, thereby contributing to the resolution of respective conflicts.

Constructivist scholarship has brought further theoretical innovation to IR, one of which is Lynch's neo-Weberian approach to religion in international politics.[154] Lynch finds that most of the scholarship on religion leaves religious ethics and doctrines out of scholarly analysis due to the essentialist, dogmatic, and stationary understanding of religion. However, she argues, religious doctrines and ethics are not stationary and they

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[150] Nükhet Sandal, 'Religious actors as epistemic communities in conflict transformation,' passim.

[151] For the theory on 'epistemic communities,' see Peter M. Haas, 'Introduction: Epistemic Communities and International Policy Coordination,' *International Organization* 46, issue 1 (1992): p. 1-35.

[152] Sandal, 'Religious actors as epistemic communities in conflict transformation,' p. 933.

[153] Ibid., p. 935.

[154] Cecelia Lynch, 'A Neo-Weberian Approach to International Politics,' *International Theory* 1, no. 3 (2009): p. 381-408; Cecelia Lynch, 'A Neo-Weberian Approach to Studying Religion and Violence,' *Millenium: Journal of International Studies* 43, no. 1 (2014): p. 273-290.

are prone to change in line with the context they become relevant in and the actors' interpretations of them. According to this logic, religious doctrines and ethics do not act as they appear in religious texts and sources. Rather, religious doctrines should be taken as ethical constructs by actors who attach specific functions and meanings to them in line with their socio-political contexts. Lynch's approach to religion is an important contribution to our understanding of religion in one crucial way. Lynch does not treat religion as a static entity but as a process which is also shaped by religious actors and the socio-political circumstances in which it appears. This approach makes religion not only an independent variable but a dependent variable in scholarly analysis. Lynch's neo-Weberian approach is also a viable tool to understand why certain religious doctrines become more politicized than others, or why a specific religious doctrine becomes politicized under a specific context while not in others.

Despite its secular Westphalian bias, constructivism has generated a theoretically rich and innovative body of literature in the study of literature. An equally innovative literature on religion and international politics is generated within the post-structuralist IR scholarship. Two theoretical contributions to the study of religion are the Copenhagen school of security studies and international political theology. Both contributions share post-structuralism's 'linguistic turn,' where the linguistic act becomes practical act. Copenhagen school of critical security studies has opened a successful path for the integration of religion into security studies. Laustsen and Weaver's work on the securitization of religious objects is one of the landmark studies in this scholarship.[155] A sub-element of the Copenhagen school, securitization theory studies 'how security issues are produced by actors who pose something (a referent object) as existentially threatened and therefore claim a right to use extraordinary measure to defend it.'[156] This theory posits that a referent object is assigned such an importance and urgency above other political objects and issues that extraordinary measures are required to protect it and/or to ensure its survival.[157] Relevant political actors securitize an object or an issue for a political purpose and in line with the audience who can either accept or reject its securitization.

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[155] Carsten Bagge Laustsen and Ole Weaver, 'In Defense of Religion: Sacred Referent Objects for Securitization,' *Millenium Journal of International Studies* 29, no. 3 (2000): p. 705-739.

[156] Ibid., p. 708.

[157] Ibid.

Therefore, securitization theory holds that security is not objective, but inter-subjective, defined by what is securitized, by whom, and how.[158] Securitization scholars emphasize speech-act as a central element of the securitization process, whereby an object or issue is securitized simply by labeling it as a security issue. If a political actor propagates a specific ethnic identity to be under threat, that ethnic identity becomes a security issue and any measures to protect it becomes legitimate.[159] Laustsen and Weaver argue against the mainstream association of religion with an identity or community though. Religion has rather a substantive core differentiating it from ethnic communities and identities such as being Kurd or Armenian. Taking religion as a sui generis category with a substantive core, they define it as 'true faith, our possibility to worship the right gods the right way and—in some religions—thereby have a chance of salvation.'[160] Laustsen and Weaver employ the securitization framework in examining what referent objects are metamorphosed into religious security issues. They find that agents often securitize religious places, taking them as sacred referent objects. In conflict settings, religious places of worship, churches, tombs, and shrines are made an issue of protection and intervention by political actors with attempt to benefit politically or militarily.

Sheikh contributes to the ongoing securitization debates by deconstructing the concept of religion.[161] She employs Ninian Smart's seven-part scheme for the study of religion, which differentiates between the emotional, legal, doctrinal, material, institutional, practical/ritual, and narrative/ritual aspect of the concept.[162] She questions what aspect of religion gets referred to by religious actors aiming to defend religion. Building on Smart, Sheikh re-conceptualizes religion as a composite concept which can be analyzed as a type of culture, identity, rationality, power, doctrine, interpretative community, etc. depending on the research question.[163] Sheikh's reconceptualization of religion as a composite concept can help IR scholars and policy makers to analyze what

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[158] Ibid.

[159] Ibid.

[160] Ibid., p. 709.

[161] Mona Kanwal Sheikh, 'The Religious Challenge to Securitization Theory,' *Millenium: Journal of International Studies* 43, no. 1 (2014): p. 252-272.

[162] Ibid., p. 260.

[163] Ibid., p. 263.

transnational or domestic religious groups seek to defend when securitizing religion. Fundamentalist religious groups and their actions are often interpreted with respect to the religious doctrine they are subscribing to. However, securitization research can help identify whether it is a religious community, identity, or doctrine that is being securitized and extraordinarily defended.

Despite her scholarly subscription to securitization theory, Sheikh also criticizes securitization theory for its neglect of taking religion *qua religion*.[164] While most of the scholarly work in religion and IR emphasize the constructed nature of religious-secular divide including securitization theory, they still treat religion as another type of ideology, identity, or instrument. Religion loses its very core in such studies, being often treated as an instrument for a higher and serious aim. The instrumentalist logic, which is implicit in securitization theory also, takes religious doctrine only as an instrument for achieving certain political, economic aims, thereby dissociating religion from its own essence, relevance and meaning. The reverse position is the essentialist position though, which delinks religion from the behavior of its followers and the socio-political and the institutional context. Sheikh implicitly proposes that the scholars studying religion should not fall into these two polar positions. They should rather find the middle ground between the deterministic, doctrinal aspects of religion per se and its possible instrumental relevance for other spheres.

Building on her *religion quo religion* discussion, Sheikh proposes three possible paths to incorporate religion into IR studies in another work. She argues that subscribing to *religion quo religion* approach necessitates leaving the instrumentalist or essentialist accounts of religion aside and identifying the substantial dimensions of religion at the first place. Accordingly, she proposes three substantial dimensions of religion: religion as a belief community, religion as power, and religion as speech act. Scholars who identify religion as a belief community can examine how the constructions of religious identities or the interpretations of religious doctrines can shape political actors' decisions.[165] The identification of religion as a power emphasizes religion being a distinct form of

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[164] Mona Kanwal Sheikh, 'How Does Religion Matter? Pathways to Religion in International Relations,' *Review of International Stuides* 38, issue 2 (2012): p. 365-392.

[165] Ibid., p. 379.

rationality and authority which can 'shape interests, political action, and identities.'[166] Accordingly, religion as a power might appear 'as a competitive provide or order, justice, security and legitimate violence vis-à-vis the state.'[167] Religious as a speech act is what securitization scholars subscribe to. Speech act theory takes speaking as doing and examines what the referent objects of religious security are. Sheikh argues that the referent object of religious security is not identity or community, but the true faith.[168]

Not all studies within post-structural IR scholarship subscribe to securitization theory. Another scholarship employing speech act theory without necessarily restricting its focus to securitization is Kubalkova's international political theology.[169] Kubalkova takes a non-positivist approach to the study of religion, questioning the existing secular ontology and positivist epistemologies of mainstream IR and constructivist scholarship. She defines her approach to the study of religion as one of rule-based constructivism a la Onuf, i.e. how rules influence the non-linguistic aspects of human existence. Kubalkova argues that religion is an *assertive rule* in Onuf's terms, which have been dismissed as 'non-modern, primitive and irrational' in social science scholarship.[170] These rules are articulated by religious communities and religious actors generally in informal networks and give them a special status and prestige. Assertive rules require not an active but a passive acceptance of information as education does. Given the prestige the religious actors embody, religious rules as a type of assertive rules inform the followers what they don't know and ought to know. As such religion as a set of assertive rules direct the process of reasoning. The reasoning driven by emotions and passions can be more powerful that rational calculations at times. The politicization of religion happens when religion as a set of assertive rules meet with other types of rules such as commissive and directive rules, which embody wealth and power. At this point, one should study how religion as an assertive rule might define the structure and the agency, the conditions for

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[166] Ibid., p. 381.

[167] Ibid., p. 382.

[168] Ibid., p. 384.

[169] Vendulka Kubalkova, 'Towards an International Political Theology,' *Millenium: Journal of International Studies* 29, no. 3 (2000): p. 675-705; Vendulka Kubalkova, 'International Political Theory,' *Brown Journal of World Affairs* 12, no. 2 (2005-2006): p. 139-150; Vendulka Kubalkova, 'A 'Turn to Religion' in IR?' *Perspectives: Review of Central European Affairs* 17, issue 2 (2009): p. 13-42.

[170] Kubalkova, 'Towards an International Political Theology,' p. 691.

rational choice, the constitution of resources, institutions and social relations.[171] Kubalkova argues religion as a set of assertive rules can become an international force, even a hegemonic force, as such.

Both constructivism and post-structuralism have generated a rich body of research integrating religion into these paradigms. One crucial contribution to the study of religion and international politics is the problematization of the concept of religion. Scholars either employ alternative terminologies such as public theology and international political theology, or they deconstruct the concept of religion to study its multiple aspects. This was part of an attempt by constructivist and post-structural scholars to recognize and the substantive core of religion and to examine religion *quo religion*, as different from and/or transcending ideologies, identities, or mobilization tools. The mainstream IR scholarship with its realist and liberalist off-shoots, on the other hand, has refused to treat religion *quo religion,* but they defined it as another ideology or identity aiming to serve certain political, military or economic aims. The increasing volume of scholarship on religion within both paradigms reflected the recognition of the rising relevance of religion in world politics, though a slow and reluctant one, even to the point of challenging their own ontological and epistemological premises. However; their refusal to examine the substance of religion, and depicting as merely another type of identity, ideology, or mobilization tool stood in the way to do what rationalist, positivist, and problem-solving paradigms claim to do the best: to explain why. Why did religion revive at the first place? Why did religion but not any other non-religious political ideology or ethnic identity become so central to the international political movements today? Why do people tend to mobilize around religious movements rather than movements with non-religious ideologies such as communism? What is distinctive about religion that makes it so successful in shaping politics and conflicts today? By taking religion *quo religion*, constructivist and post-structuralist paradigms make an attempt to understand the concept and defining elements of this concept first. The deconstruction and the examination of this multifaceted and multilayered phenomenon not only opens up a fertile research ground for constructivist and post-structuralist scholarship on religion, but also for scholarship with an instrumentalist view on religion. Rationalist and positivist scholarship can study what aspect of religion gets instrumentalized in political and military decision-

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[171] Ibid., p. 689.

making mechanisms. Similarly, rationalist and positivist scholars can examine the rationality behind religious movements and behavior. Theoretically informed studies on religious rationality can not only enrich these paradigms theoretically, but also help them explain religious-related phenomena, to reveal cause and effect mechanisms behind such phenomena, to ask why, without degenerating their core scientific assumptions and premises. While constructivist and post-structuralists scholarly concern for the substantive core of religion opens a room for theoretical innovation, what is missing as yet is their application to empirical cases. Studies employing religion as a composite concept or adopting international political theology in its stead are low in number. Scholarship merging these theories with the empirics will pave the way for further innovative research in the study of religion and world politics.

2.5. Hypotheses

To relate the aforementioned-discussion on how different IR paradigms might answer the research questions posed for the purposes of this study, we can propose three basic hypotheses each corresponding to one IR paradigm.

Hypothesis I: Iran is caught up in a regional power game since 2003, where the regime instrumentalizes religion to become the regional leader.

Hypothesis 1 is a realist one, as it focuses on the functional use of religion as a foreign policy tool. A realist hypothesis presumes that states might use religion as a cover for high-politics objectives. In that sense, realism sees religion relevant to international politics only to the extent that it serves the state's military, economic, political interests. While religion seems to be the most distant paradigm towards the study of religion, the functional use of religion can be incorporated into the assumptions about interaction context/setting as well as rationality, interests, and foreign policy objectives. According to this hypothesis, states can extend military and economic support to religious groups in a civil conflict within a rival state, if the prolongation of the conflict will diminish the power of that rival state. Alternatively, states can extend military and economic support to a regime with the same religious identity to secure their alliance with that state and

their own standing. What is crucial is also to identify why policy makers might choose religion as a functional tool, i.e. what functionality religion does play. How does religion as an identity, doctrine, or institution contribute to religion becoming a 'power' on its own? Or how does religion as a 'power' can in turn influence the interaction-setting, preference orderings, and behavioral outcomes? If states are increasingly employing religion or sectarian identity as part of their geopolitical calculations, we need to further identify what aspects and functions of religion can serve states' geopolitical interests.

> ***Hypothesis II:*** Iran's religious foreign policy in the Middle East reflects the ongoing factional balances tipping towards regime hardliners in domestic politics.

Given the emphasis on sub-national actors, the third hypothesis theoretically adheres to the liberal paradigm. The testing of the hypothesis first necessitates the identification of any foreign policy change that is accompanied by a leadership change. A powerful presumption about Iranian foreign policy is that the regime's foreign policy swings between ideology and pragmatism in line with the power balances in domestic factional politics. Accordingly, when reformist and/or conservative pragmatist factions achieve political leadership, the foreign policy tips towards pragmatism. However, when regime hardliners achieve political power, Iran pursues a rather ideological foreign policy. Iran's religious ideology and identity since 1979 has driven the regime towards an ideological foreign policy in various decades and under various leaderships in its contact with the West. The question is whether this swing towards a religious foreign policy is defined by factional swings across all foreign policy themes? This study focuses on this question in testing Hypothesis II.

> ***Hypothesis III:*** Iran's Islamist revolutionary ideology leads to an ideological and religious policy in the Middle East.

The second hypothesis is a constructivist hypothesis. This hypothesis rests on the presumption that states have identities and ideational factors plays a role in shaping foreign policy behavior. The religious and sectarian identity can assign certain transnational roles, duties, and even ideologically defined interests to a state. If a religious or sectarian community in another state is facing an actual or perceived threat by another religious or sectarian group, the co-religionist or co-sectarian state can extend military

and political support to that community out of a self-ascribed moral duty to do so. In a similar vein, a state might have a grand vision and objective of establishing a religio-political community. Any military, political, and economic support to co-religionist and/or co-sectarians extended by this state can reflect this ideological foreign policy objective. Iran's foreign policy during the revolutionary period can be defined as a good example of ideological foreign policy, characterized by ideologically and Islamically defined roles, duties, and transnational objectives. The question is whether religious ideological played a role in steering Iran's foreign policy in the post-revolutionary period as well. Does the revolutionary period have an ideological and religious legacy over following periods? In what ways does religious identity and ideology exhibit continuities in the realm of foreign policy? Is there an observed change in its role over time and in what ways? The coming chapters will focus on these questions in testing the relevance of Hypothesis III.

As discussed in Chapter 1, this study will treat the concept of 'religion' as a 'public theology.' The reason for this choice is that religion in the sense of a public theology refers to the practical implications of religious doctrine on non-religious spheres of life including the politics, economics and society through human interpretation of religious faith and doctrine. This dissociates the concept of religion from its static nature and embraces the historical, temporal and spatial circumstances in which religious faith and doctrine might manifest itself in various aspects of foreign policy. In line with this, this study treats 'religion' as a multi-faceted concept, i.e. religion as an identity, ideology, mobilization capability, legitimization tool, institution, among others. While testing the above-given hypotheses, this study will also examine various facets and roles of religion in Iran's foreign policy.

2.6. Conclusion

This chapter has laid the basic theoretical background of this study. Accordingly, this study follows the footsteps of an emerging scholarship that integrates the study of religion into IR. This chapter first discussed how religion has been ignored by IR field due to the ontological, methodological, and epistemological bias of the field. This discussion was followed by a classification of existing scholarship into three dominant IR paradigms and suggestions on how to further study religion within each paradigm. Three hypotheses have been proposed to examine the increased relevance and role of religion in Iran's Middle East policy after 2003. The following section will discuss the role of religion in Iran after the Islamic Revolution of 1979 and how it impacted the revolutionary period's foreign policy.

CHAPTER 3

IRAN'S FOREIGN POLICY AND RELIGION

3.1. Introduction

Iran is a interesting case for an analysis of the role of religion in foreign policy making. The Islamic Republic is run by a theocratic regime since the Islamic Revolution of 1979. Twelver Imamate Shiism is recognized by the Islamic Republic's Constitution as the state religion and the state is ruled by *velayet-e faqih*, a modern conceptualization of Shia clerical rule introduced by Ayatollah Khomeini which presumes 'the guardianship of the jurist' over state affairs.[172] This new theocratic regime aroused curiosity among academics and policy-makers alike regarding the new mechanics and orientation of Iranian foreign policy. The immediate implications of the 1979 Revolution was that it introduced a new state ideology, which can be summarized as a careful and innovative blend of anti-imperialism, anti-liberal and Islamic modernism, and revolutionary Islamism. The Shia identity and Shia clerical institutions fed into the religious elements within the state ideology. Coupled with revolutionary motives, the Shia and Islamic elements provided a road map for the new regime's behavior on the transnational front during the early years of the revolution. The Islamic Republic assumed ideologically defined transnational duties in international politics that further determined its transnational interests and objectives. On the other hand, the Islamic Republic continued

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[172] See Article 12 for 'Twelver Shiite Imamate' and Article 57 for *velayet-e faqih* of the Islamic Republic's Constitution, 'The Constitution of the Islamic Republic of Iran,' *World Intellectual Property Organization Website,* accessed May 20, 2018, http://www.wipo.int/edocs/lexdocs/laws/en/ir/ir001en.pdf.

to exist within the secularly defined Westphalian order which required the interests of the nation-state to be the central driver of foreign policy behavior.

Pursuing transnational Islamist goals as a nation-state functioning within the Westphalian system created dualities for the foreign policy behavior of the Islamic Republic. The identity and ideology-infused transnational roles and interests of the Islamic Republic posed dilemmas for the rationally-defined nation-state interests, thereby creating a constant debate around ideology vs. rationality/pragmatism in Iran's foreign policy since 1979. In this respect, analysts on Iranian foreign policy have predominantly dealt with Iran's foreign policy behavior as a constant swing between ideology and pragmatism since the 1979 Islamic Revolution.[173] Such analysts treated the Iranian foreign policy as being shaped by incumbent Iranian leaders' positions on the ideology and rationality axis and compartmentalized foreign policy across four periods: 1) the revolutionary period between 1980-1989 which covers the period of leadership under Imam Khomeini, 2) the period between 1989-2005 which coincides with conservative pragmatist Hashami Rafsanjani's presidency and his successor reformist Mohammad Khatami, 3) the period between 2005-2013, which is characterized by the presidency of hardliner Mahmoud Ahmadinejad and the increased role of Islamic Revolutionary Guard Corps in politics, and finally 4) the period since 2013, when another centrist and pragmatist president Hassan Rouhani assumed office.

The inherent assumption in this periodization is that the Islamic Republic pursued an ideological foreign policy until the death of Imam Khomeini in 1989. Iran's foreign policy discourse during this period heavily relied on Imam Khomeini's understanding of the international political system and the revolutionary Iran's role within this system. One foreign policy priority was given to the defense of the new revolutionary regime against external 'aggressors,' which were extensively defined by the revolutionary regime to include both Saddam Hossein and his regional and international collaborators committed to toppling down the regime. The revolutionary regime, which put emancipation and independence as key themes of its revolutionary process, acclaimed itself as a 'model' to inspire others for similar revolutionary movements; and hence 'the export of the revolution' or of revolutionary ideology was adopted as another foreign policy priority.

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[173] See Fakhreddin Soltani and Reza Ekhtiari Amiri, 'Foreign Policy of Iran After Islamic Revolution,' *Journal of Politics and Law* 3, no 2 (2010): 199-206; Anoushiravan Ehteshami and Mahjoob Zweiri, *Iran's Foreign Policy* (Ithaca Press: Reading, 2008); K. Ramazani, 'Ideology and Pragmatism in Iran's Foreign Policy,' *Middle East Journal* 58, issue 4 (2004): p. 549-559.

Facing the grave consequences of the prolonged war with Iraq and the perceived disappointment with the export of the revolution policy, the revolutionary regime's transnational aspirations slowly dimmed. Iran's careful calibration of reconstruction needs and economic interests in the post-1989 period was interpreted by others as a turn to pragmatism and rationalism in foreign policy. The fact that president Rafsanjani put foreign policy priorities on the economic reconstruction of the country and his successor Khatami attempted for the political integration of the Islamic Republic into the existing international community as a modern, pluralist Islamic regime in 'peaceful coexistence'[174] with other states seemed to strengthen the proposition that Iran was choosing pragmatism and rationality over ideology.[175] On the other hand, president Ahmadinejad seemed to steer Iran's foreign policy back to ideology after 2003, where his foreign policy discourse revolved around the issue of 'justice'[176] in the international system, which was manifested extensively in his non-reconciliatory attitude towards the West on the issue of nuclear politics.[177] When president Rouhani's emphasized economic development, sought end the international isolation of Iran, and started rapprochement with the West on the nuclear issue after 2013 which culminated in the historic nuclear deal in 2015, this was acclaimed as the hallmark of pragmatism in Iran's foreign policy.[178]

Such periodization has analytical merits, as it neatly maps out Iran's foreign policy behavior and facilitates its study. The periodization inherently reflects the factionalization

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[174] For Dehghani-Firouzabadi's discussion of Rafsanjani and Khatami's foreign policy discourses, see Sayyed Jalali Dehghani-Firouzabadi, *Siyaset-e Khareji-e Jumhuri-e Eslami-e Iran, (The Foreign Policy of the Islamic Republic of Iran)* (Tehran: Sazeman-e Motalee va Tadvin Kotb Olum-e Ensani-e Daneshgaha Markaz-e Tahgig va Tosee Olum-e Ensani, Shamsi 1391/Miladi 2012).

[175] See Eva Patricia Rakel, 'Iranian Foreign Policy since the Iranian Islamic Revolution: 1979-2006,' *Perspectives on Global Development and Technology* 6, issue 1 (2007): p. 159-187; Mehdi Mozaffari, 'Revolutionary, Thermidorian and Enigmatic Foreign Policy: President Khatami and the Fear of the Wave,' *International Relations* 14, no. 5 (1999): p. 9-28; Shah Alam, 'The Changing Paradigm of Iranian Foreign policy under Khatami,' *Strategic Analysis* 24, no 9 (2000): p. 1629-1653.

[176] For Dehghani-Firouzabadi's discussion on Ahmadinejad's foreign policy discourse of 'justice,' see Dehghani-Firouzabadi, *Siyaset-e Khareji-e Jumhuri-e Eslami-e Iran*, p. 232-237.

[177] For an extended account on Ahmadinejad's 'assertive' foreign policy, see Mark Gasiorowski, 'The New Aggressiveness in Iran's Foreign Policy,' *Middle East Policy* 14, issue 2 (2007): p. 125-132; Amir M. Haji-Yousefi, 'Iran's Foreign Policy During Ahmadinejad: From Confrontation to Accommodation,' *Alternatives: Turkish Journal of International Relations* 9, no. 2 (2010): p. 1-23.

[178] Mohammad Ayatollahi Tabaar, 'Iran's Pragmatic Turn,' *Foreign Policy*, September 12, 2013, http://foreignpolicy.com/2013/09/12/irans-pragmatic-turn/; Mohammad Javad Zarif, 'What Iran Really Wants: Iranian Foreign Policy in the Rouhani Era,' *Foreign Affairs* 49, no 3 (2014): p. 49-59; Mahmood Monshipouri and Manochehr Dorraj, 'Iran's Foreign Policy: A Shifting Strategic Landscape,' *Middle East Policy* 20, issue 4 (2014), https://www.mepc.org/irans-foreign-policy-shifting-strategic-landscape.

of Iran politics in the post-1989 era, and each faction's understanding of how to solve the revolutionary regime's existential dilemmas following the moderation of early revolutionary fervor.[179] Nevertheless, such periodization misses the intricacies of a highly complex political system marked by dualities. For one, this periodization assumes that ideology and pragmatism stand as two opposite poles. Such reasoning leaves out the fact that the Islamic Republic is a revolutionary regime and the revolutionary ideology is the raison d'etre of the Islamic Republic. The ideology can directly act as a framework for the revolutionary regime, determining its roles and duties in the international arena, decision-making processes, foreign policy institutions, interests, capabilities, and even security culture. Any foreign policy decision dedicated to the defense or expansion of the ideology can be very rational, where rationality and ideology distinction becomes obsolete.

For another, such reasoning dismisses the manifested dynamism of the Islamic Republic over time, where the regime has constantly transformed itself in line with internal and external realities. One mistake in the study of the Islamic Republic would be to treat the Islamic Republic as a theocratic system that was established with the Islamic Revolution in 1979 for once and for all. Rather, the Islamic Republic is a work in progress for the last forty years. In this respect, the Islamic Republic started out as an infant revolutionary Islamic regime, with no role model or precursor to emulate in terms of ideology, institutions, and survival strategies in an international system which does not favor the longevity of such a revisionist and anti-systemic regime. Creativity was necessary to define and re-define its own terms of existence ideologically, institutionally, and strategically. Finding a common ground between a revolutionary Islamist ideology committed to revising the international system and its need for survival as a territorial nation-state functioning in this very system was a necessity. Reaching a consensus between the ideological duties and interests on the one hand, and the more territorially defined security-related and economic interests was another. On top of that should be added the clashing internal forces since the revolution, where the secular and the religious, the state and communal elements of the regime enter an internal tug of war over their interpretations of the system, interests, and their imagination of a proper

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[179] For a discussion on 'factionalism' in the Islamic Republic, see Wilfred Buchta, *Who Rules Iran?: The Structure of Power in the Islamic Republic* (Washington DC: Washington Institute for Near Eastern Studies and Konrad Adaneur Stiftung, 2000).

revolutionary regime. In this respect, Mishal and Goldberg describe the praxis of policy making in Iran is as a 'friction' due to the diverse 'interpretation' of issues, values, and interests at the state and communal, religious and secular, national and international levels.[180] Any policy should thus be treated as a middle-ground outcome of constant interpretative 'debate' of internal and external circumstances within the regime.[181] The question of ideology and rationality is a 'debate' or 'friction' as well, where ideology and rationality amalgamate with one another at different levels and under different conditions, thereby shaping the foreign policy context, interests, foreign policy objectives and preferences. The Islamic Republic's foreign policy is thus more complex than the ideology and rationality duality would permit.

Finally, this periodization is delineated predominantly over an examination of Iran's relations with the West. Upon examining the history of domestic factionalism, one realizes that domestic factions exhibited great divergence over the themes of Iran's economic integration into the global system and diplomatic relations over the nuclear program. On the other hand, factions remained relatively consensual on regional issues and relations with the Muslim world. Iranian consistency in supporting the Lebanese Hezbollah and the Palestinian movement is the paragon of this consistency. Rationality-ideology dichotomy may serve as a useful analytical category in examining Iran's relations with the West, but it may fail to address the relative consistency in the Middle East policy.

One central argument of this thesis is that the issue of religion in Iran's foreign policy transcends the ideology-rationality dichotomy, while simultaneously reflecting the 'debate' and 'friction' inherent in Iranian policy making. Given the Shia identity and revolutionary Islamist ideology of the regime, one can consider religion originally as an identity and ideology shaping various components of Iran's foreign policy including its transnational roles, duties, interests, objectives, capabilities. Religion has constituted the ideological infrastructure of the revolutionary regime and has been ingrained into the institutions of the regime since the revolution. Therefore, we can argue that religion has

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[180] Shaul Mishal and Ori Goldberg, *Understanding Shiite Leadership: The Art of the Middle Ground in Iran and Lebanon* (New York: Cambridge University Press, 2014), p. 7.

[181] Ibid.

been a consistent element of Iran's foreign policy. Nevertheless, this does not mean that religion has impacted each aspect of foreign policy in the same way and played the same role across all periods. More than frequently, external and internal circumstances explain what aspect of the religious ideological discourse is highlighted for the purposes of a specific policy. In a similar vein, these circumstances determine whether religion is employed for achieving the state's transnational ideological objectives, for regional power maximization, or for regime survival. We should thus keep in mind the ideological and infrastructural consistency of religion and/or of revolutionary Islamist ideology in the Iranian case and move our focus to the internal shifts in the duties, interests, and objectives associated with this religion. In other words, we should focus on the 'friction' and 'debate' associated with the religious ideology of Islamic Republic in the realm of foreign policy.

This chapter is thus devoted to understanding the role of religion as an element influencing various components of Iran's foreign policy since the Islamic Revolution of 1979. The first section of this chapter is devoted to understanding the role of religion in the pre-revolutionary period. Therefore, the first section makes a lengthy discussion of the institutions of the Shia faith, the emergence of Shia *hawzas*, and the transnationalization of Shia political activism in the Middle East before 1979. The following sections discuss the socio-political circumstances and the ideological underpinnings of the Islamic Revolution of 1979. Against this historical background, the last sections examine the early experiences of the Islamic Republic in external relations, where 'the Holy Defense War' with Iraq and 'the export of the revolution' will be our focus. The chapter will finally conclude with an analytical discussion on the how religion shaped the transnational roles, duties, interests, objectives, and even capabilities of the Islamic Revolution during the first decade of the revolution, with ramifications over following decades.

3.2. Transnational Shia Political Activism in the Middle East

The discussions about an emerging Shia political activism in the Middle East and that of 'Shiite Crescent' started in 2003, when the fall of the Saddam regime as the epitome of Arab nationalism in the Middle East gave way to the empowerment of Shia political parties in Iraq.[182] While 2003 was a crucial turning point for religious politics in the Middle East, we should not overlook the underlying socio-political or religio-political structures that pushed up to the surface when right conditions arose. When we look past 2003, and 1979, we observe the historical formation of a self-standing Shia clerical networks with significant political, economic, and theological independence across the Middle East. Independent poles of Shia clerical centers coexisting under multiple national settings emerged. These clerical centers were horizontally aligned with one another and formed transnational religious networks across the Middle East. An exploration of these historical structures and processes will show that the Islamic Revolution in Iran and the emerging Shia revival in the Middle East is a consequence of the long-accumulated religio-ideological currents, institutions, and networks in the region. The institutionalization of the Shia *ulama* and Shia learning *hawzas* are the first step of this process.

3.2.1. The *Usuli* School and the Institutionalization of Shia Religious Authority

The schism between the Sunni and Shiites is one of disagreement over legitimate religious and political leadership of the Islamic *Ummah* following the death of the Prophet. The Shia form of Islam emerged subsequent to the appropriation of religio-political institution of caliphate by the Umayyad Dynasty and the suppression of the prophet's remaining family in the Battle of Karbala in the 7th century whom the Shias see as the natural heir to the caliphate. The Shias saw family line and heritage as the source of legitimate authority and leadership. The Shia tradition then created the institution of the *Imamate* under the authority of the Sixth Imam Jafar al-Sadeq.[183] Arjomand defines

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[182] See Nasr, *The Shia Revival*, p.17-29.

[183] Said Amir Arjomand, *Turban for the Crown: The Islamic Revolution in Iran* (New York: Oxford University Press, 1988), p. 11.

the doctrine of the *Imamate* as 'divinely inspired leadership,' where the *Imams,* each of whom would be a descendant of the prophet's family, would get their authority from divine inspiration and *ilm*, the knowledge.[184] The *Imams* were tasked with leading the life in the Islamic community, i.e. the *Islamic Ummah*, in line with Qur'anic precepts and Islamic traditions in the post-four caliphate period. Religious leadership during this period would differ from the four-caliphate period, as Islam had transcended its confined borders at the lower ends of the Arabian Peninsula and spread to upwards to Syria, Iraq, and Iran, which generated the need to adapt the Islamic thought and socio-political system on these new geographies. The Imams were thus the descendants of the prophets, tasked with studying and interpreting the Qur'anic precepts and Islamic traditions according to the needs of the socio-political structures existing on the new geographies and generating legal systems to lead the everyday life and politics of the Islamic *Ummah*. In that sense, the Shia *Imams* were the chief religio-legal and political authorities governing the *Ummah* in the absence of the prophet. The family heritage and Islamic knowledge was one element that defined the institution of the *Imamate*, while charismatic leadership was another. In this respect, Dabashi argues that the institution of the *Imamate* was the perpetuation of 'charismatic' leadership that began with the Prophet Mohammad and continued with the institution of the caliphate, the martyred Imam Ali and his descendants.[185] This charisma manifested in the institution of the *Imamate* through the concept of 'infallibility,' where the *Imams* were deemed to be 'infallible' sources of emulation in their legal judgement, action, and the leadership of the Islamic community in all aspects of life.[186] The office of the *Imamate* in the Shia tradition was maintained until the end of the disappearance, the *Gaybet,* of the 12th Imam during a political conflict in the 9th century.

The *gaybet* of the 12th Imam precipitated the formation and gradual institutionalization of the Shia *ulama* for the coming centuries. Following the *gaybet* of the 12th Imam, the absence of a religious authority to interpret the Qur'anic precepts and

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[184] Ibid.

[185] Hamid Dabashi, *Shiism: A Religion of Protest* (Cambridge: Harvard University Press, 2011), p. 57.

[186] For a detailed discussion on infallibility, see Akram Sadat Ojagh, Ebrahim Sedighi and Jamal Rezaei, 'The Study of the Authority of an Act of Infallible Imam and Its Illustrations in Jurisprudence,' *Journal of Politics and Law* 9, no. 6 (2016): p. 182-186.

Islamic tradition gradually created the body of Islamic scholars, the *ulama*, who would interpret and execute the Islamic law. A single authority to interpret and execute Islamic law in the body of the *Imam* was decentralized and delegated to multiple, though no more infallible, religious authorities due to the theological vacuum that emerged following the disappearance of the last *Imam*. This soon generated theological discussions over the interpretation and execution of religious law. Two main legal schools of thought emerged in this respect: The *Akhbari* and *Usuli* schools. From a theological and legal perspective, the *Akhbari* school places the *Quran* and *Hadith* as the only sources of Islamic law, where no jurist or human authority could generate Islamic law.[187] On the other hand, the *Usuli* school added the element of individual reasoning of the *ulama*, the Islamic jurist, as an additional source of Islamic jurisprudence to *Quran* and *Hadith*.[188] The emergence of rationalist Shiite jurists and theologians such as al-Sharif al-Murtada and his student al-Shayk al-Tusi in the 11th century, who emphasized the rational thinking and reasoning by the learned jurist as an additional component of the sacred law and thus increased the substantive content of the sacred law by accepting individual traditions contributed to the formation of the *Usuli* school.[189] By early 14th century, the principle of *ijtihad*, which highlighted 'the competence of the jurist to derive legal norms from the sources of the Sacred Law' and finding reason-based solutions to worldly problems in addition to *Quran* and *Hadith* was already established.[190] The rise of the *Usuli* school over traditionalist *Akhbaris* and the adoption of the practice of *ijtihad* had revolutionary consequences for the further institutionalization of the Shia *ulama*. In the absence of the prophet and the Imams, *mujtahids*, i.e. the independent scholars interpreting the Islamic law through *ijtihad*, achieved legal authority and independence. No unity in the interpretation of religious law was sought and each *mujtahid* was independent in his interpretation and legal formulation. The *Usuli* school gradually assured the independence of *mujtahids* as a religio-legal authority and lead to the establishment of an autonomous Shiite hierocracy.[191]

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[187] Arjomand, *Turban for the Crown,* p. 13.

[188] See Said Amir Arjomand, *The Shadow of God and the Hidden Imam* (Chicago: University of Chicago Press, 1984), p. 32-66.

[189] Ibid.

[190] Arjomand, *Turban for the Crown,* p. 13. For an extended discussion on *ijtihad*, also see John Cooper, 'Allama al-Hilli on the Imamate and Ijtihad,' in *Authority and political culture in Shi'ism,* ed. Said Amir Arjomand (New York: State University of New York Press, 1988), p. 240-250.

[191] Arjomand, *Turban for the Crown*, p. 14.

The institutionalization of Shia hierocracy gained a strong impetus, when Twelver Imamate Shiism became the state religion under Safavid rule in 1501. Sunni Sufism was the dominant form of Islamic faith among the Iranian populations in the 16th century. And the Safavid dynasty was also created by a Sufi order with a militaristic and millenarian outlook.[192] Nevertheless, the Safavids embraced Twelver Imamate Shiism as state religion and they did so for two reasons. First, their millenarian outlook matched with the Shia belief of the return of Imam *Mahdi* from the *gaybet* and rule over the world. The Safavids embraced the millenarian attributes of Twelver Shiism such as the expected return of the Twelfth Imam in *gaybet* and the return of the Imam *Mahdi* for territorial expansion over Sunni-dominated territories.[193] Secondly, the institutionalized structure of the Shia *ulama* would constitute the bureaucrats, officers, and legal professionals for the Safavid state-building. Therefore, the Safavid rulers imported Shia jurists and theologians from the Arab lands.[194] The Safavids generated a body of clerical state professionals such *sayyeds*, who were local administrators in the Safavid lands, and *shayk al-Islam*, the chief religious authorities.[195] The *Mujtahids* became the recognized authorities in taxation and non-religious law during the centralized Safavid rule, thereby acquiring authority also in non-religious law besides religious law. The establishment of a professional clergy during the Safavid rule as well as the intellectual revolution of the *Usuli* school and *ijtimah* in Shia jurisprudence marked the gradual emergence of a Shia hierocracy. The relations between the Shia *ulama* and the rulers during the Safavid rule was one of accommodation. The Safavid rule relied on the institutional structure and ideological underpinnings of Twelver Imamate Shiism for political reasons. Although the Safavid dynasty collapsed in the 18th century, the legacy of the state-clergy relationship established at that time would be rediscovered with Khomeini's moment in the 20th century. Nasr defines this as the 'Safavid contract,' where the Shia never trusted that the Safavid rule is the legitimate Islamic rule but an optimal one where they could propagate for the Shia faith and create the Shia law until the return of the Imam *Mahdi*.[196] The Shia *ulama's* support for the rulers

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[192] Ibid., p. 12.

[193] See Arjomand, *The Shadow of God and the Hidden Imam*, p. 32-66.

[194] Ibid. Also see Behrooz Moazami, *State, Religion, and Revolution in Iran, 1796 to Present* (New York: Palgrave Mcmillan, 2013), Chapter 4.

[195] Arjomand, *Turban for the Crown*, p. 13.

[196] Nasr, *The Shia Revival*, p. 72-75.

of the state in exchange for the safe domain for the propagation of Shiism provided by the state itself was carried as a new state tradition over centuries.[197]

Nevertheless, the fall of the Safavids and the dissolution of the central authority brought a new developmental path for the Shia clerical class. In the absence of a powerful central authority precipitated, the Shia clerical class became more decentralized and more independent in ensuring its own existence. The Shia clergy became more concentrated in certain geographical areas, developed their clerical learning centers, and drew clerical students across the Middle East. They were financially dependent on the taxation and voluntary contributions from the lay Shia populations to run themselves, which necessitated the spread of Shiism to wider populations by their own efforts.[198] In this respect, the migration of Shia *ulama* out of Iran following the fall of the centralized Safavid state and the weakened Ottoman authority in Iraq led to the rise of the shrine cities of Najaf and Karbala as prominent Shiite *hawzas*, i.e. clerical learning centers, in the 19th century.[199] Najaf and Karbala *hawzas* became influential ideological power centers and exerted influence on the Shiite populations in Iraq thanks to the institutional autonomy and strength of Shia *mujtahids*. Both cities became prestigious learning centers and attracted prospective students of theology from across the Middle East. The coming centuries would witness the increased relevance of Najaf and Karbala as influential centers of Shia politics.

Amid this process of clerical decentralization, two theological developments contributed to further independence and authority of the Shia *ulama* in the 19th century: 1) the idea of *velayet,* the guardianship of the jurist over the Islamic community in the absence of the prophet and Imam; 2) *taqlid,* or *mujtahids* becoming a religious example to followed in a wide range of religious and non-religious issues for the observers of the faith. Both the institution of *velayet* and *taqlid* indicated the emergence of a hierarchy among a plethora of independent *mujtahids*. Each equipped with differential levels of a knowledge of Islamic jurisprudence and piety, come *mujtahids* came to be acknowledged

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[197] Ibid., p. 74-75.

[198] Laurence Louer, *Transnational Shia Politics: Religious and Political Networks in the Gulf* (New York: Columbia University Press, 2008), p. 76.

[199] Ibid., p. 71.

as the highest authority and a source of 'emulation for all Shias in matters of religious law' and for the right path.'[200] The *mujtahids* of Najaf started to announce themselves as *marja-e taqlid,* i.e. the source of emulation and a religious reference to be followed by Shiite communities who needed the guidance of a high jurist to lead their lives according to true Islamic faith in the absence of the Imam and the prophet.[201] The followers of Shia faith could choose their *marja* and there was room for the co-existence of multiple *marja-e taqlids.* But both *velayet* and *taqlid* signaled the further concentration of clerical power centers in Najaf and the increased power and influence for the Shia *ulama* in the society.

The Shia clergy in the Najaf and Karbala *hawzas* gradually grew towards economic and political independence, forged alliance with local economic actors and relied on local gangs for security. The gradual institutionalization of the Shia *ulama* as religious and non-religious legal professionals, as state officials during the Safavid rule, and finally as decentralized educational, ideological, and social power centers in the form of *hawzas* over centuries can be said to establish them as a social class. Given the growing presence of Shia *ulama* as a resourceful social class in the Middle East, it should not be surprising to see their mobilizational capacity for political ends at the beginning of the 20th century. Two events exemplify the growing mobilizational capacity of the Shia *ulama* and religious power centers in the early years of 1900s. First, when the British mandate was imposed on Iraq following the collapse of the Ottoman state in the early, Shia clerical centers were the ones who got mobilized against the British mandate on Iraq. The Najafi clerics mobilized their tribal armies and started a nationalist revolt against the British, which is inscribed on Iraqi history as the 'Revolution of the 1920s.'[202] A similar historical trajectory was observed in Iran during the first constitutional process of 1906. Accordingly, the Shia *ulama* in Iran would be recognized as one of the seven social classes making up the consultative body, 20 % of the *majlis* would be of the *ulama*, the proposed Suplementary Fundamental Laws would recognize Twelver Imamate Shiism as state religion, and the *majlis* would be called 'the Sacred National Consultative Body.'[203]

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[200] Linda Walbridge, *The Most Learned of the Shia: The Institution of the Marja Taqlid* (New York: Oxford University Press, 2001), p. 4.

[201] Louer, *Transnational Shia Politics*, p. 76-78.

[202] For an extended discussion on the 1920 Revolution in Iraq, see Abbas Kadhim, *Reclaiming Iraq: The 1920 Revolution and the Founding of the Modern State* (Austin: University of Texas Press, 2012).

[203] For an extended discussion on Iran's Constitutional Revolution, see Moazami, *State, Religion, and Revolution in Iran,* Chapters 4 and 5.

In short, the gradual institutionalization of the Shia *ulama* in the embodiment of the *Imam*, the intellectual revolution of the *Usuli* school and of *ijtihad,* and the emergence of an independent *marja* explains the institutional empowerment of the Shia clergy as a social class and a critical power center in the Middle East. As such, the influence of religion on politics should first be sought in the institutionalization and mobilization capacity of the religious class. This very capacity has brought the Shia *ulama* as a central political stakeholder against the systemic transformations that hit the Middle East by World War I and the collapse of the Ottoman Empire in the 20th century.

3.2.2. The Iraqi *Hawzas*

The 20th century brought two systemic shocks challenging the power and the authority of the Shiite clerical centers in the Middle East: 1) the collapse of the Ottoman Empire, and 2) the abolition of the Caliphate. The collapse of the Ottoman Empire was followed by the establishment of modern, centralized nation-states under the mandate of Western powers across the Middle East except for Turkey. The new nation-state system challenged the ideological, economic, and political independence of the *hawzas* by concentrating these powers in state institutions through centralization and bureaucratization. A gradual process of centralization, rationalization of state and jurisdiction, the establishment of standing armies, secularization, and nationalization casted a serious blow to the existing legal, economic, ideological and political authority of the Shiite clerics. As discussed above, the *hawzas* power predominantly comes from their predominance over the education system. The secularization and the modernization of the education in Iraq gradually deprived the *hawzas* of their monopoly over education.[204] The secularization and rationalization of the jurisdiction also adversely affected the legal areas traditionally owned by the Shia clergy including criminal, family, and commercial law, thereby dealing a major blow to the legal and economic authority of the Shia clerics.[205]

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[204] Faleh A. Cabbar, *Irak'ta Şii Hareketi ve Direniş*, trans. Hikmet Halis (Istanbul: Agora Kitaplığı, 2004), p. 210-216.

[205] Ibid., p. 91.

The abolition of the Caliphate by the new nation-state system in Turkey was the second shock to the status of religion within the Middle Eastern socio-political system. In a sense, this event caused a shock wave across the Muslim world, as the modern nation-state system and westernizing political reforms brought by it carried the implications of Western individualism and liberalism as a counter-force to the symbols of Islamic values within society. Crooke argues that individualism as associated with Western modernization and the communitarianism of the Islamic society clashed with the modernization policies, secularization, and the abolition of the Caliphate in early 20th century Middle East.[206] The Islamic thought was based on a collective social system, which implies 'a just, equitable, and compassionate society' – an *Ummah* – where religion is experienced not only on the individual level, but also governs the day-to-day affairs of the individuals at the collective level for the 'collective welfare' of the *Ummah*.[207] According to Crooke, the Caliphate was the institutional guardian and embodiment of this Islamist collectivist world view as opposed to the rising Western individualism and its embodiment as the secular nation-state system. Therefore, the abolition of the Caliphate created an organizational vacuum for the survival of this worldview in the Middle East and for the quest for alternative reflections in Islamic thought and organization. This was a time for innovation in Islamic thought and organization and the emergence of multiple and decentralized movements of Islamic theology and philosophy in a geographically dispersed fashion both in the Sunni and Shia world.[208] 'Horizontal networking of the Islamic *Ummah*' had replaced the vertical and hierarchical system of the Caliphate.[209]

The nation-state building process not only casted a blow to Shia clerical authority, but also influenced the status of Shia populations within these new political systems in an adverse manner. The nation-state building and modernization had a chain of influences over Shia populations in the Middle East. First, the modernization process loosened the strong relations within confessions, where the traditional social links between the Shia

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[206] See Alastair Crooke, *Resistance: The Essence of Islamic Revolution* (London: Pluto Press, 2009), passim.

[207] Ibid., p. 58.

[208] Ibid., Section 2.

[209] Ibid., p. 58.

clergy and the Shia religious authority were adversely impacted.[210] In Iraq, the modernization and rationalization of the system gradually changed the nature of traditional tribal social relationships. It is true that tribal and religious leaders' influence over their followers were gradually diminished, but the community-relations were thoroughly dissipated but rather changed its form. In this respect, the nation-state building across the Middle East predominantly favored the Sunnis in many countries, where governmental and bureaucratic posts and economic benefits were distributed according to community- and sectarian affiliations. The nation-state building process in the early 20th century created today's sectarianism across the Middle East, which can be defined as the accumulation of socio-economic and political grievances by a social class demarcated by religious-sectarian affiliation.[211] As Majidyar argues in an interview with the author, 'the marginalization and discrimination of the Shiite communities within the Arab world,' where 'the Shiites are treated as second class citizens, denied their rights,' marks sectarian politics in the Middle East today.[212] The political problems and conflicts between religious sects today should thus be understood as an extension of the failed nation-state building processes in the Middle East for decades.

In Iraq too, the state-building process and the ensuing bureaucratization favored the Sunnis in the country both during the monarchical rule and the Baath regime. The well-educated Shias in the urban centers were disappointed by the lack of access to bureaucratic positions and underrepresentation in the new state, which lead to an accumulation of grievances.[213] Western political ideologies and thoughts seemed like a possible solution to the perceived injustices and inequalities experienced by the Shia populations, where especially Marxism and communism addressed that need. Those well-educated, urban Shias of Iraq were particularly drawn to the communist movement in Iraq.[214] When Abd-al Karim Qasem achieved power in Iraq via a military coup in Iraq in

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[210] Nasr, *The Shia Revival*, p. 83.

[211] For a discussion on sectarianism, see Khalil F. Osman, *Sectarianism in Iraq: The Making of State and Nation since 1920* (New York: Routledge, 2015); and Fanar Haddad, *Sectarianism in Iraq: Antagonistic Visions of Unity* (New York: Oxford University Press, 2011).

[212] Ahmad Majidyar, expert on Iranian domestic and foreign policy at Middle East Institute, Washington DC, USA. Interview with the author, conducted on November 20, 2017 at Middle East Institute in Washington DC, USA.

[213] Cabbar, *Irak'ta Şii Hareketi ve Direniş*, p. 85.

[214] Yitzhak Nakash, *Irak'ta Pandora'nın Kutusu Şiiler,* trans. Metin Saltoglu (Ankara: Elips Kitap, 2005), p. 133.

1958 and later allied with the communist block to ensure his rule, the Shia *ulama* started to associate Marxism with the existing regime.[215] Moreover, the Shia clergy was disturbed by the potential influence of communism in further undermining their already shaken authority over the Shia population. Both communist movement and the Shia *ulama* overlapped as sources of patronage for the disadvantaged Shia in the society. As a result, the Shia clerics in Najaf proposed Islamism an alternative solution addressing the grievances of the Shias.[216] Marxist ideology and Islamism encountered as rivals addressing the same social base. However, this encounter would have a tremendous impact on the mobilizational and ideological evolution of Islamism in Iran before 1979.

Although Islamism as a political ideology was born in Najaf *hawza*, it is rather surprising that politically active Shiism was developed as an innovative political brand by the Najafi scholars. The Najaf *hawza* has always been the most recognized and prestigious Shiite religious center since the 19th century, with its clerical education centers, schools, large numbers of students coming to the *hawza* ranging from Pakistan to Lebanon, and the amount and the quality of theological works they generated in the Islamic thought and philosophy. The prestigious position of Najaf as a strong center for Islamic law, theology and philosophy confused the theologians at the senior positions on the *hawza's* emerging political activism. Some clerics were 'politically quietist,' where they propagated for clerical non-interference in political affairs. The reason is that they thought political interference would diminish the theological quality of the Islamic scholarship they are renowned for. According to this quietist school, Najaf should remain as an elite Shia learning center, as any interference with politics can contaminate its quality and the prestige of Shia scholarship. A prominent *marja* representing the quietist position was Muhsin al-Hakim, who was recognized as the sole *marja* between 1955 and 1970 only in Iraq, but also for all Shia communities across the Middle East. His rise as the sole *marja* coincided with the rise of communist movements in Iraq and the later rise of pan-Arabist Baath Party. During this time, al-Hakim shunned politics to a greater degree, restricted other clerics and Shia communities' participation in the communist movement and the party with an attempt to limit the influence of Marxist-communist

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[215] Ibid., p. 135.

[216] Ibid., p. 134.

thought on the Shiite communities.[217] Al-Hakim was also seeking to protect the *hawza*'s relative independence and immunity from the central state during this period. Al-Hakim's traditional quietist position was later adopted by *marja* Qasim al-Khoei between 1970 and 1992 to a certain extent and by Ali al-Sistani from 1992 onwards until he assumed a more political position with the Iraqi political developments in 2009.

An alternative position to the 'quietist school' was taken up by the prominent clerical Sadr family in 1950s. A Najafi Shia scholar himself, Baqir al-Sadr led the 'politically activist' current originated in the Najaf *hawza* and he became the key name for the intellectual discussion and institutionalization of political Shiism in Iraq. Baqir al-Sadr was a leading cleric of the time and he contributed to political Shiism through his governmental and economic theses. His *Our Philosophy* is noteworthy in this respect, where he criticized the dominant ideological currents of the West, i.e. Marxism and capitalism, and proposed an alternative system of government based on Islamic philosophy and institutions.[218] Baqir al-Sadr's proposed political system was one where the Islamic *ummah* was governed by Islamic law in a democratic way.[219] He argued that the *khilafat,* i.e. the caliphate, meant the government of the people during the time of the prophet. The *Imams* took up the duty of governing the *Ummah* after the period of four caliphate period. However, the 12th Imam disappeared and left room for the government of the Islamic community by an alternative political structure. This political structure, Baqir al-Sadr argued, would be based on the regular election of representatives from the community. In other words, the right and responsibility to rule was transferred to the *Ummah* with the disappearance of the last *Imam* according to Baqir al-Sadr.[220] The role of the *marjaiyya* within this system would be one of final supervision over the executive and legislative bodies elected by the *Ummah*.[221] Baqir al-Sadr's thesis on the rule of the *Ummah* in a democratic way was a great novelty in the political philosophy of the time and a significant contribution over the political philosophy of Shia governmentality. Sadr

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[217] Ibid., p. 135-136.

[218] Crook, *Resistance: The Essence of Islamic Revolution,* p. 88.

[219] Ibid., p. 90-91.

[220] Ibid.

[221] Louer, *Transnational Shia Politics,* p. 86.

was therefore inscribed into Shia intellectual history both as a political philosopher and an influential Shia cleric.

Baqir al-Sadr's contribution to Shia politics was not only limited to writing philosophical treatises, but he also mobilized one of the first modern examples of Shia political activism in Iraq. Baqir al-Sadr, along with al-Hakim's son, founded the famous Islamic Dawa Party of Iraq in 1958.[222] The Dawa Party can be defined as the first modern resistance movement in the form of a Shia political party in modern Iraqi history. Baqir al-Sadr merged what he observed about the mobilizational and organizational components of modern political movement with his Islamist vision. The Dawa Party was a Shia clerical political party committed to establishing a democratically-ruled Islamic *Ummah*. The party published booklets on Islam's position on workers' rights and overcoming wealth inequality, trained activists through party work, established religious schools and charity organizations.[223] Baqir al-Sadr's political treatise and Islamic Dawa Party are crucial first steps towards the mobilization of political Shiism.[224] Theoretically, Baqir al-Sadr had put forward a Shia theory of political government in *Our Philosophy*. Practically, he had gone against the traditional quietist position of the Najafi Shia *marja* and formed a Shia political party. As such, we can argue that the seeds of a Shia-led Islamic state were sown in Iraq and an Islamic State would perhaps be expected to materialize in Iraq. However, the Shia political revival faced a brutal suppression in Iraq when the Baath regime came to power by a coup in 1968 and Baqir al-Sadr was executed by Saddam's regime in 1980. The Dawa movement was originally a local one, in the sense that the movement aimed to challenge the central government in Baghdad and the Najafi political activism retained its local/national contours until 1980s. Despite his inherently local vision, Baqir al-Sadr inspired similar movements elsewhere, and this time, with international repercussions.

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[222] Ibid., p. 84.

[223] Ibid., p. 85.

[224] See T. M. Aziz, 'On the Role of Muhammad Baqir al-Sadr in Shii Political Activism in Iraq from 1958 to 1980,' *International Journal of Middle East Studies* 25, no. 2 (1993): p. 207-222.

3.2.3. The 'Karbala Paradigm' and the Transnationalization of Shia *Hawza* Activities

The Shia political activism that was initiated by Najafi clerics in Iraq soon evolved as a decentralized and horizontal network-type Islamic movement across the Middle East. New clerical centers with political credentials emerged across the Middle East. One such clerical center was based in the Iraqi city of Karbala. Karbala had a great religious symbolism for the Shias world. The historic battle between Imam Hossein and the Umayyad ruler that defined the great schism in the world of Islam took place in Karbala. The death of Imam Hossein and his followers in this desert town with a definitive crackdown by the Umayyad is inscribed in the narrative history of Shiism as an instance of oppression and injustice inflicted upon the rightful Prophet's family by the illegitimate, unjust ruler. On the other hand, Imam Hossein's encounter with and suffering in the hands of the Umayyad ruler's forces is received as a virtue of sacrificing the self for the greater good of the Islamic community. The Karbala narrative is thus a founding myth for the Shias, marked by a great suffering inflicted on their rightful leader, self-sacrifice, and by martyrdom.[225] The elements of oppression, self-sacrifice, and martyrdom in this narrative shaped the self-identification of the Shias as an oppressed and marginalized faith community. This is also reflected on their political positioning against central authority. Nasr argues that the martyrdom of the Imam deepened the Shias' rejection of and resistance to Sunni authority as well as of worldly domination and power as a manifestation of this belief.[226] The emotional elements, the passion of self-sacrifice, and the drama of oppression have been kept alive to this day by Shia religious rituals.[227] The Ashura ceremony is a hallmark ritual in this respect. The Ashura ritual is a mourning and commemoration ceremony, where Imam Hossein and his family's suffering and self-sacrifice is animated with symbolic self-tormenting and self-sacrificing rituals by ordinary Shias.[228]

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[225] On Karbala symbolism, see Kamran Scott Aghaie, *The Martyrs of Karbala: Shi'i Symbols and Rituals in Modern Iran* (Seattle: University of Washington Press, 2004), Chapters 1 and 6.

[226] Nasr, *The Shia Revival*, p. 54 and 58.

[227] Ibid., p. 58.

[228] On a history of Ashura ceremonies, see Nakash, *Irak'ta Pandora'nın Kutusu Şiiler*, p. 141-157; Nasr, *The Shia Revival*, p. 44-51.

In modern times, the narrative, ritualistic, and emotional underpinnings of Karbala have surpassed its original reference to a 7th century battle to refer to a resistance movement, revolutionary moment, and social uprising.[229] The narrative of Karbala Battle, the socio-political experience of Shias throughout history, the accompanying narratives of suffering, oppression, and martyrdom, as well as the drama and emotions attached to this historical experience are invoked by the Shias for political mobilization. Fisher calls this 'Karbala Paradigm,' i.e. 'the Shi'ite paradigm of struggle for social justice, against the government.'[230] In other words, the Shia narratives of Karbala have constituted the Shia political culture of resistance against injustice, oppression, and discrimination inflicted by the central authority. We should also put the 'Karbala Paradigm' in its proper context when evaluating the perceived Shia marginalization and disempowerment within Sunni-ruled countries in the region, as referred to by Majidyar in his interview.[231] The Karbala narrative is the emotional and ritualistic component of the Shia faith. Besides the institutional components of the Shia faith, this ritualistic component, also serve mobilizational purposes for Shia political activism in the following centuries.

The city of Karbala in Iraq hosts the shrine of Imam Hossein and has thrived on the symbolism of martyrdom and community rituals in the Shia world as a city of shrines and pilgrimage. This has also differentiated the Karbala *ulama* from their Najafi counterparts. The Karbala *ulama* did not grow as much on the quality of Islamic theology and philosophy they have produced as they did on the promotion of the emotional and ritualistic collective consciousness created by the Karbala.[232] If Najaf *hawza* became renowned for its theological elitism, Karbala's popularity was folk-based, emotional, and ritualistic. Therefore, the Najaf *hawza* enjoyed a theological strength over Karbala *hawza* in the 20th century. Louer argues that a religious leadership crisis between Najafi and Karbala *hawza* further shaped the nature of the distinction between the two. Accordingly, Najafi scholars did not endorse the theological credentials and religious leadership of the

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[229] See Kamran Aghaie, 'The Karbala Narrative: Shia Political Discourse in Modern Iran in the 1960s and 1970s,' *Journal of Islamic Studies* 12, no. 2 (2011): p. 151-176.

[230] Fisher applies the term in examining the evolution of Karbala narratives from the Revolution to the Green Movement. See Michael Fisher, 'The Rhytmic Beat of the Revolution in Iran,' *Cultural Antropology* 25, issue 3 (2010): p. 513.

[231] Majidyar, interview with the author.

[232] Louer, *Transnational Shia Politics,* p. 91-92.

Karbala cleric Mohammad al-Shirazi. In return, al-Shirazi strengthened his position as the leader of Karbala by tapping into his 'social capital' in the city, i.e. by establishing close personal connections and alliances to other clerical families, merchants, and Iranians.[233] Al-Shirazi also tapped into the historical importance of Karbala and the very resistance narratives in establishing Karbala as a reputed rival *hawza* to Najaf. In short, Karbala *hawza* rose with the Karbala clerics' social capital and the emotional, ritualistic power of the shrine city of Karbala, rather than the *hawza*'s theological and scholarly outputs.[234]

Politically, al-Dawa Party and the Najafi clerics were dominating the local Iraqi politics. Therefore, al-Shiraziyyin family of Karbala engaged in political mobilization in a distinct form. Their formation resembled al-Dawa in the sense that they put Islamism at the center of their political discourse and they employed violent action against the central authority in Iraq.[235] But the Karbala-led political organization diverged from al-Dawa by giving primacy to the Shia clerical supervision on politics, where Louer defines the formation as 'a secret revolutionary avant-garde' rather than a mass political party.[236] When the Shia political activism was harshly suppressed by the Baath regime, the Karbala *hawza* moved its activities across the border, to Iran and the Gulf countries with sizable Shia minorities. Important clerical families of Karbala including al-Shirazi, al-Qazwini, and al-Modarrasi already had strong personal and family ties with Iran and Qom *hawza*.[237] Many of their members moved to Qom, were exposed to theological training, and widened their personal ties there. Al-Shirazi family formed strong *hawza* ties to Shia populations in the Gulf, such as in Kuwait and Bahrain. The nature of these activities remained as horizontal cross-clerical networks and the activities aimed at reviving cultural and religious ties among the Shias living under varied nation-states. To this end, they established Shia learning centers, empowered the Shia *ulama* in these countries and supported Shia community networks.[238]

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[233] Ibid., p. 91-93.

[234] Ibid., p. 92-95.

[235] Ibid., p. 98-99.

[236] Ibid., p. 99.

[237] Ibid., p. 101.

[238] Ibid., p. 103-151.

Another importance of Karbala *hawza* was that the clerical families were close allies of Ayatollah Ruhollah Khomeini of Iran well before the Iranian Revolution of 1979. Khomeini is known to spend time in Najaf *hawza* during his exile to Iraq in 1964, a period which coincides with Baqir al-Sadr's political activism in Iraq. Khomeini was presumably influenced by Baqir al-Sadr's philosophy of Islamic governance based on popular representation, upon which he would form the basis of his own theory of Islamic government – *velayet-e faqih*.[239] While Baqir al-Sadr did not live long to materialize the Islamic State along the idea of popular representation, Khomeini was preaching about his theory of *velayet-e faqih*, i.e. the guardianship or government by the jurist, when he was still in Iraq. Despite Baqir al-Sadr's political engagement, the *marja* Al-Hakim predominantly remained as a politically quietist scholar. When the Islamic Revolution happened in Iran, Al-Hakim's successor Qasem al-Khoei maintained his predecessor's tradition of political quietism and abstained from endorsing the Islamic Revolution in Iran.[240] While the Najafi *marja* remained quiet on the revolution in Iran, the Karbala *hawza* became the main supporter of Khomeini both before and after the Islamic Revolution.

The most prominent cleric of Karbala supporting the Iranian Revolution was Mohammed al-Shirazi. Al-Shirazi entertained the idea of a transnational Islamic revolution and the establishment of a clerical government. Along with his supporters called 'the Shiraziyyin,' Al-Shirazi saw the Islamic Revolution in Iran as the first step towards an 'Islamic world revolution' and as compatible with his transnational ideals.[241] Therefore, he sheltered Khomeini right before the revolution in Iran and continued to be the chief transnational clerical ally of the revolutionary regime after 1979. When Baqir al-Sadr was executed by the Baath regime, the Karbala *hawza* attained a critical opportunity to press the Karbala influence in Iraq, which they thought would be achieved via their transnational networks. After the revolution, Khomeini invited Al-Shirazi to Qom to run his own seminaries and let al-Shiraziyyin open a political office in Tehran to

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[239] Rodney Wilson, 'The Contribution of Muhammad Baqir al-Sadr to Contemporary Islamic Economic Thought,' *Journal of Islamic Studies* 9, no. 1 (1998): p. 46-59.

[240] 'Abolqasem al-Khoei,' *Encyclopedia Britannica*, last modified August 4, 2018, https://www.britannica.com/biography/Abolqasem-al-Khoei.

[241] Louer, *Transnational Shia Politics,* p. 177-178.

control and coordinate their transnational activities.[242] The revolutionary regime concurrently adopted the policy of regime exportation in 1981 by opening the 'Office of the Liberation Movements' and assigning Mohammad Montazeri, the son of one of the greatest clerical figures of the revolution Grand Ayatollah Hossein Ali Montazeri, to lead the office.[243] The transnational ideals of the Shiraziyyin and the Office of the Liberation Movements overlapped for a period of time and the Iranian regime provided material support to Shiraziyyin's office in Tehran, from where the revolutionary influence was expected to spread across the Middle East by Shiraziyyin's transnational activities.

Nevertheless, Iranian alignment with the Shiraziyyin got severed due to the emerging theological differences regarding the nature of the Islamic regime in Iran. At its essence, Khomeini's understanding of the *velayet-e faqih* was based on the rule by a single *marja* and he was that single *marja*. Al-Shirazi, on the other hand, was propagating for leadership by a collective *marja*.[244] This was both a leadership struggle over a prospective 'Islamic *Ummah*' and a theoretical disagreement over Shia governmentality. Al-Shirazi had brought his own entourage of fellow clerics and students to Qom *hawza* and was seeking to establish a plurality of *marjaiyya* in Qom. For Khomeini and his cadres, Al-Shirazi's efforts in Qom not only meant a direct challenge to Khomeini's authority in Qom *hawza* and hence was a source of power struggle between the two, but Al-Shirazi's understanding of collective leadership of the *marja* also risked the very Islamic state building process in Iran.[245] Therefore, the Shiraziyyin influence was tamed by the revolutionary regime in Iran in the following years, as was the case with other dissident clerical voices in Qom after the revolution, and while Al-Shirazi stayed in Qom until his death in 2001, he had already become marginalized from 1982 onwards.[246]

The historical evolution of Shia political movements shows that there was already a Shia political revival in the Middle East well before the Iranian Revolution in 1979. The political movement was spearheaded by the Shia *ulama* and Shia *hawzas* in Iraq. Their

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[242] Ibid., p. 182.

[243] Frederic M. Wehrey, *Sectarian Politics in the Gulf: from the Iraq War to the Arab Uprisings* (New York: Columbia University Press, 2014), p. 26.

[244] Louer, *Transnational Shia Politics,* p. 188.

[245] Ibid., p. 189.

[246] Ibid., p. 190.

evolution as independent institutionalized legal and ideological authorities and their mobilization capabilities have raised the Shia *ulama* as central political stakeholders. The institutional independence of the Shia *ulama* comes from their theological and jurisdictional subscription to the *Usuli School*, which gives senior clerics the authority to interpret, formulate, and execute the Islamic jurisprudence. The Shia clergy thrived as legal experts, jurists, and bureaucrats of the Safavid rule and their ideological, educational, and legal influence was maintained after the fall of the Safavids. The advent of nation-state system in the Middle East, modernization, secularization, and Westernization came as a systemic shock to the Shia *hawzas*. However, the Shia clerical centers had already developed the institutional and mobilizational capacity to act as an organized political and ideological resistance force against these structural shocks. In this respect, some clerics from Najaf and the Karbala *hawza* steered the course of Shia political mobilization in Iraq. The foundation of an Islamic government was perhaps expected to materialize in Iraq, but the repressive mechanisms of the Baath regime hindered such a formation. In the end, the Islamic Revolution materialized in Iran in 1979.

The Iranian Revolution of 1979 not only provided inspiration for similar movements, but also the organized institutional mechanism to materialize similar objectives. The transnational Shia movement would continue in the form of horizontal networks of dispersed and variegated Shia actors across the Middle East. It should be noted that the Shia actors who participate in this network exhibit significant theological differences and pay allegiance to different branches of Shiism such as Alawi Shiism, Twelver Imamate Shiism, or Ismailism. However, what binds them is their idea of a socio-political 'resistance' against the structural shocks of the 20th century and a willingness to respond to them via collective endeavor. What sets them apart along the path is the emerging differences of opinion over the political ideas and mechanisms to achieve this ideal. The intra-Shia relations are hence woven with constant forging and breaking of alliances and as much political rivalries as cooperation and alignments. The Islamic Revolution in Iran unleashed such a complex network of relationships among the Shia centers and figures, ranging from Iran to Iraq and Lebanon, which will be discussed in the coming sections.

3.3. The First Modern Shia State of the Middle East: The Islamic Republic of Iran

A crucial step in understanding the role of religion in Iran was understanding the rise of transnational Shia revival, both in its clerical and political forms by the 20th century in the Middle East. A second crucial step is to situate the Islamic Revolution of 1979 within this transnational Shia movement and evaluating the revolution as the culmination of this movement into a revolutionary Shia theocracy in Iran. This makes an analysis of the nature of the revolutionary Islamist regime in Iran with a specific emphasis on the socio-political context and the intellectual background of the revolution necessary. The Islamic Revolution of Iran should be evaluated as a step towards an Islamic state-building process in Iran and this process rests on three pillars: 1) The revolution was a reaction against the adverse implications of Westernization, modernization, and foreign intervention in Iran, which got aggravated by the Shah regime's social engineering policies and the authoritarianism accompanying it. 2) The revolutionary regime has institutionalized a peculiar Islamist political ideology and political system. 3) Not only the revolutionary character of the movement and the dominant political ideology, but also the early experiences of the revolutionary regime informed the institutional build-up and evolution of the system. The next two sections will discuss the first two pillars of this process.

3.3.1. The Socio-Political Basis of the Islamic Revolution

The development of the revolutionary ideology in the pre- and early revolutionary period has a prolonged history. The whole process can be traced back to the politics of modernization during the Qajar dynasty. Influenced by the Ottoman reforms at the end of the 19th century, the Qajar rule undertook several attempts at Westernization and modernization which included modernizing the army, industrializing the economy, giving trade concessions to Western countries, bureaucratizing the state, and modernizing the education system.[247] However, the modernization attempts, the increased British and Russian intervention, and the subsequent transformation of the socio-economic structure

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[247] Nikki Keddie, *Modern Iran: Roots and Results of Revolution* (New Haven: Yale University Press, 2003), p. 49-58.

had disruptive effects for the Iranian society in the long run.[248] The modernization of the Iranian state which was aborted during the Qajari rule by the revolts of traditional aristocracy and Shia *ulama* was taken up first by Reza Khan and then by his son Reza Shah starting from 1930s. Institutional changes which included a new civil code and secular education system were introduced in a top-to-down fashion. In addition to that, the rise of capitalistic system and the generation of a western-style bourgeoisie in a society largely based on agricultural economy is also invoked as a precipitator of disruptive changes in the pre-revolutionary Iranian society.[249] In the rural areas, the landlords became more powerful vis a vis tenants and peasants in this system, who lost their lands and remained at a disadvantaged position economically, thereby creating grave land-related problems.[250] In the urban setting a new bourgeoisie was created which was composed of bureaucrats, army officers, merchants, and foreign investors as well as a working class who remained economically and socially disadvantaged vis a vis the changes.

By 1960, rapid capitalization had brought severe economic problems and high levels of inflation, % 60 of the urban population were living on the slums, and the discrepancy between classes was widened.[251] Landlords and the urban bourgeoisie were better-off vis a vis land tenants, peasants, and urban working class people. Reza Shah sought to address these problems through two means: First, he introduced a reform package, the so-called 'White Revolution' of 1962, which included a historical land reform stipulating the distribution of land to landless tenants and peasants.[252] Secondly, he opened the country to increased foreign influence in several sectors. While the first strategy created additional economic discussions and contributed to the reform weariness of the public, the second one increased foreign-dependency. The Iranian natural resources and oil stood at the center of the discussions concerning foreign influence on the country. The large oil reserves proved to be both a doom and an asset for the Iranian state for the

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[248] Ibid.

[249] Ibid., p. 89-95.

[250] Ibid., p. 116-117.

[251] Ibid., p. 120.

[252] For White Revolution, see Arjomand, *The Turban for the Crown,* p. 73; Mohsen Milani, *The Making of Iran's Islamic Revolution* (Colorado: Westview Press, 2nd edition, 1994), p. 43-47.

solution of economic and political problems experienced by the Iranians. The British had already gained concessions over Iranian oil sector since Nasr-al Din Shah of Qajar for searching oil and mining.[253] The British influence over the Iranian oil increased gradually from World War I onwards, when the British established the Anglo-Persian Oil Company (APOC) with an attempt to secure oil flows to the Royal Navy.[254] This was followed by increased concessions to the British over oil search in Northern provinces of Iran, oil operations, and employment at APOC.[255] Amid economic problems experienced by Shah's economic modernization policies, the oil sector soon became critical, steering the course of politics in Iran. As result, internal political discussions concerning the foreign influence over Iran's national resources culminated in a short nationalist revival in early 1950s, when Mohammad Mosaddeq of the National Front came to power as the prime minister of Iran.[256] Once he came to power, Mosaddeq established the National Iranian Oil Company (NIOC) and nationalized the Iranian oil.[257] The nationalization of the Iranian oil was a shock to the British. Along with the USA, whose oil interests were also indirectly threatened by the nationalization of oil in Iran, the UK staged a coup against Mosaddeq.[258] The coup would be inscribed in the Iranian psyche as the hallmark of foreign intervention in Iranian politics and inflame the Iranian sentiments against Western colonialism and imperialism.

By 1979, Iran was suffering the disruptive effects of the complicated and problematic process of modernization in all spheres. Greater inequality between landlords and peasants, between the urban and the rural, and among the urban centers across the country had led to the accumulation of public grievances. The economic reforms and land reforms introduced by Shah Reza Pahlavi were far from improving the situation of the disadvantaged segments of society. Following the coup against Mosaddeq, the US achieved increasing influence over the military and politics of the Iranian state. The US

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[253] F. Kazemi, 'Anglo-Persian Oil Company,' *Encyclopaedia Iranica*, last modified August 5, 2011, http://www.iranicaonline.org/articles/anglo-persian-oil-company.

[254] Ibid.

[255] Ibid.

[256] Ervand Abrahamian, *Modern Iran Tarihi,* trans. Dilek Şendil (Istanbul: Turkiye İş Bankası Yayınları, 2008), p. 150-156.

[257] Ibid., p. 155.

[258] Ibid., p. 154-161.

had monopoly over arms and military technology sales to Iran and had an increased influence over the government by providing advice on financial matters.[259] The existing public funds were spent on arms and technology purchase from the USA as a part of Shah's military modernization. The US control over governmental planning through political counselling meant a direct encroachment by foreigners of Iran's domestic policy processes. By 1979, the problem in Iran was the accumulation of grievances especially at the lower segments of society who were left disadvantaged by the modernization of the Iranian state at large and hence were chanting for equality, justice, and independence from foreign influence.

The Iranian society whose disadvantaged segments are adversely effected by a rapid and mishandled process of modernization coupled with capitalism and foreign interference did create two ideological backlashes: Marxism and political Islam. Like the case of Iraq, it is not surprising to encounter the simultaneous emergence of both ideologies. First, both ideologies appealed to the disadvantaged segments of the society, i.e. the working class of the urban setting as well as the peasants and tenants of the rural areas. Both ideologies, therefore, sought to address the socio-economic complications created by industrialization and rapid urbanization. Second, both ideologies intersect at their anti-colonialism which formed the basis of all political and governmental discussions in Iran due to the increasing British and American influence in the country. Both Marxism and Islamism exhibited rivalry over the intended population base, as both addressed the common socio-economic and political problems experienced by the lower and disadvantaged segments of the society. It is therefore not surprising to see the intellectual environment of the pre-revolutionary period to be marked by Marxists as well as the theological and philosophical writings by Shia clerics and lay Shia scholars. A manifestation of the Marxist vitality at the intellectual level was the Marxist political parties, where the historic Tudeh Party is the most significant example of this intellectual trend.[260] The fate of the Marxist political parties was one of harsh suppression by the Shah's regime, which only pushed these groups either towards dissolution or its reverse, armed guerilla tactics.[261] The Marxists were thus hindered by the Shah regime in their

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[259] Keddie, *Modern Iran: Roots and Results of Revolution,* p. 163-165.

[260] Milani, *The Making of Iran's Islamic Revolution*, p. 76; and Farhang Jahanpour, 'The Rise and Fall of the Tudeh Party,' *The World Today* 40, no. 4 (1984): p. 152-159.

[261] Keddie, *Modern Iran: Roots and Results of Revolution,* p. 219.

attempts to reach wider masses. Nevertheless, Marxists made a significant contribution to the Iranian revolutionary spirit, albeit in a manner unforeseen: The Islamists were gradually drawn into Marxist ideology and subsequently imported Marxist elements into their Islamists political agenda. The popular Mujahedeen-e Khalq is the outcome of such an ideological amalgamation - Islamist-leftism, where the sons of the ulama and the bazaaris increasingly adopted a Marxist vocabulary and sought to fit the 'revolution' discourse into Shiism. They merged the Karbala narratives with the Marxist concepts of revolution, class, and justice. They rephrased Imam Hossein's resistance against Umayyad Dynasty in Karbala as a class-based revolt against landlords.[262] The Mujahedeen's ideological development went synchronically with Ali Shariati's lectures that merged Shiism with the revolutionary elements in Marxism and both put Shiism as a mobilizational element for a successful revolution against the Shah regime. In short, by the time the revolution came, the socio-political context in Iran had generated a variety of intellectual currents all of which would feed into the ideology of the revolutionary regime, which is the topic of the next section.

3.3.2. The Intellectual and Ideological Basis of the Revolutionary Regime

As previously discussed, an ideological current emphasizing the active role and responsibility of the clergy to philosophically devise and practically execute a political movement to address the socio-economic ills created by modern nation-state building and colonial intervention was underway in the Middle East as far back as the beginning of the 20th century. The Constitutional Revolution in Iran and the failed 1920 Revolution in Iraq are the first instances of clerical mobilization in this respect. Later in 1950s, Baqir al-Sadr both generated a theory of Shia governmentality and stood out with his political engagement in the Dawa Party in contrast to the traditionally quietist approach of Najaf *hawza*. Baqir al-Sadr's empowerment as a Shia political resistance force against the central Iraqi state also inspired Karbala *hawza,* where their activities reached Gulf countries and Al-Shiraziyyin family became a significant ally to Iran during the revolution. Therefore, while the Iranian society was giving birth to a resistance movement against Westernization, modernization, and colonialism, a transnational circulation of

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[262] Ibid., p. 221.

intellectual ideas was already underway. Political Shiism had emerged as an intellectual current, a political solution, and as a transnational force. Finally, this current found a voice in Iran through the works of Iranian Shia clerics and lay scholars and an intellectual environment emerged, where several clerical figures and Shia thinkers exchanged views on the prospects of Shia faith for generating political solutions to the socio-political problems at hand. As such, we should interpret the revolutionary moment in Iran as well as the revolutionary regime as a reflection of the theological-philosophical vitality sweeping Iran and the region well before the revolution. While there are numerous clerical figures and lay Shia thinkers who influenced the pre-revolutionary intellectual environment in Iran such as Shariatmadari, Taleqani, and Bazargan among others, the personalities whose intellectual legacy is traceable in the institutions and ideology of Iran's foreign policy will be covered within the scope of this study. Three figures worth-mentioning within this context are Jalal al-Ahmad, Ali Shariati, and Ayatollah Ruhollah Khomeini.

A prolific writer, philosopher, and intellectual of his time, Jalal al-Ahmad's contribution to the intellectual discussions surrounding the Iranian society is his coinage *Gharbzadegi,* i.e. 'Westoxication.'[263] Jalal al-Ahmad was the son a Shia cleric in Qom, who had lost his position due to Shah's anti-clerical policies.[264] During 1960s, Al-Ahmad took an anti-Shah position and first got affiliated with the communist Tudeh Party. However, he gradually shifted away from Western ideologies to Islamism, in an intellectual environment which increasingly associated Westernization in Iran's cultural arena with Western domination in economics and politics.[265] Al-Ahmad's famous coinage *Gharbzadegi* addressed to this Western domination and referred to the adverse implications of Western lifestyle, habits, and culture on the social and economic structures of the Eastern nations.[266] According to Al-Ahmad, the importation of Western liberal values, capitalism, consumerism, and Shah's pro-American policies constitute the 'Westoxication' of the socio-economic system in Iran.[267] The concept of 'Westoxication'

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[263] Nikkie Keddie, ed., 'Introduction,' *Religion and Politics in Iran* (New Haven: Yale University Press, 1983), p. 11.

[264] Keddie, *Modern Iran: Roots and Results of Revolution*, p. 189.

[265] Ibid.

[266] See Jalal al-Ahmad, *Gharbzadegi* (Tehran, 1962).

[267] Keddie, 'Introduction,' p. 11.

reflected the growing anti-Americanism in Iran during 1960s, especially after the coup against Mosaddeq government. However, its relevance went beyond decades and was adopted by Ayatollah Khomeini in designing the indigenous cultural, economic, and public policies of the revolutionary regime. In the post-revolutionary Iran, 'Westoxication' implied a strict anti-Western and anti-American cultural policy. In the foreign policy as well, the term can be associated with the heavy anti-Americanism of Iran's foreign policy discourse, where the USA is designated as the chief enemy - 'the Great Satan'[268] - and American hegemony as 'global arrogance.' As coming sections will discuss in more detail, the self-portrayal of the Islamic Republic as a force resisting the American-dominated international system and the American policies in the region is rooted in the rising anti-Americanism and discourses like *Gharbzadegi* in the pre-revolutionary period.

Greatly influenced by Jalal al-Ahmad's 'Westoxication,' but becoming more popular than any other scholar in the pre-revolutionary period is not a cleric, but a sociologist of religion – the famous Ali Shariati. A sociologist educated in France during 1960s and interested in the Algerian Liberation Movement of the time, Shariati was heavily influenced by Marxism as well as third-worldism.[269] As a Marxist, he was interested in the Marxist logic of the emancipation of the peoples by revolution. However, Shariati was questioning the mechanics of social mobilization for a successful revolutionary action, and more specifically, how an emancipatory revolution would be achieved in a non-European setting. Shariati's contention was that the Marxist ideas of class struggle, justice, and revolution were meaningful and valuable for an emancipatory political movement, yet insufficient as discourses, terminologies, imageries after which Iranian masses would get mobilized. Shariati was thus seriously questioning how a Marxist movement could mobilize the Iranian peasants living in the rural parts of Iran against the Shah regime. He had a belief in the power of religion in mobilizing the masses, but he was particularly disillusioned with Shia clerics. Shariati saw Shia clerics primarily as an institutionalized body legal scholars with a 'clerical monopoly' over the interpretation of Islam, distant from the real needs and problems of ordinary people,

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[268] On the concept of 'Great Satan,' see W. O. Beeman, 'Images of the Great Satan: Symbolic Conceptions of the United States in the Iranian Revolution,' in *Religion and Politics in Iran,* ed. Nikki Keddie (New Haven: Yale University Press, 1983), p. 191-217.

[269] Ervand Abrahamian, *Radical Islam: The Iranian Mojahedin* (London: I.B. Tauris, 1983), p. 107.

funded by and serving the interests of the propertied classes and *bazaris* in Iran.[270] What he was reacting against was the institutionalized, legalized, hierarchical 'Safavid Shiism,' and in response, he was proposing 'Alid Shiism.'[271] Shariati's conceptualization of 'Alid Shiism' rested on folk Shia imageries of Karbala, Shia heroes of Ali and Hossein, as well as on martyrdom.[272] He rephrased Imam Hussein's struggle with the Umayyad Dynasty in Karbala as a struggle between an oppressor ruler and a resistant religious leader.[273] Shariati hailed Imam Hossein's martyrdom as an example and inspiration for the Shias to take the necessary social action for achieving equality and justice in the 20th century Iranian setting.[274] His solution for igniting the revolutionary fervor among the masses and drawing them to the Iranian streets was to borrow from folk Shiism. Shariati's lectures, writings, and tapes became very popular in Iran before the revolution, but he passed away without seeing the revolutionary moment in Iran. Nevertheless, there is no contention in that his ideas inspired a wide range of intellectual currents, activists, and thinkers in pre-revolutionary Iran ranging from Mujahedeen-e Khalq to Ayatollah Khomeini. His thought impacted not only the revolutionary moment, but the revolutionary state-building in Iran as well. Although he did not participate in the revolutionary action, his theoretical merger of revolutionism with Shia imageries earnt Ali Shariati the title of 'the ideologue of the Islamic Revolution.'[275]

Ayatollah Ruhollah Khomeini is the Shia theologian who acted on the revolutionary moment in Iran. As a Shia theologian, he contributed to the pre-revolutionary intellectual environment with his unique theory of Islamic government, *velayet-e faqih*. However, as discussed elsewhere, his political thinking was influenced by the non-quietist, non-traditional, and fundamentalist theological-intellectual movements of the time in Iraq. Khomeini is known to be in contact with Baqir al-Sadr of Najaf in the 60s and 70s, when the latter's theory of representative government in *Our*

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[270] Ibid., p. 119-121.

[271] Keddie, *Modern Iran: The Roots and Results of Revolution*, p. 203-204.

[272] Nasr, *The Shia Revival*, p. 128.

[273] Ibid.

[274] Ibid., p. 129.

[275] See Ervand Abrahamian, 'Ali Shariati: Ideologue of the Iranian Revolution,' *Islam and Politics, MERIP Reports* 102 (1982): p. 24-28.

Philosophy generated political discussions in the *hawza* over Shia clerical rule.[276] Contrary to the political quietism of the Shia clerics of Qom in Iran and following the line of political activism opened by Baqir al-Sadr and Dawa Party in Iraq, Khomeini advocated clerical intervention into politics. According to Khomeini, while the society was undergoing great social and economic difficulties under the rule by an unaccomplished monarchy, the world should not wait for the coming of the vanished Imam to bring justice and salvation. The Shia clerics should rather actively seek solutions to the daily problems experienced by the nations of the whole world. Accordingly, his theory of *velayet-e faqih*, refers to the guardianship of the jurist and the government of the society by a *marja* in accordance with the precepts of the Islamic faith in the absence of the vanished 12th Imam.[277] Khomeini's *velayet-e faqih* is inspired by Plato's 'philosopher king,' where he sees the educated *ulama* as the legitimate class to guide and take care of the spiritual and national interests of the nation.[278] In Khomeini's understanding, the Islamic faith was not only to be believed, but to be acted and proactively implemented by the Shia clergy. Besides political activism of the Shia clergy, Khomeini also borrowed from Baqir al-Sadr's popular elections, as he was aware that popular participation was necessary for the total transformation of the old system. The idea of 'the guardianship of the jurist' based on popular representation formed the basis of the key Islamic governmental bodies in revolutionary Iran such as the popularly elected 'assembly of experts' and 'the supreme leader' elected by the former.

Another source of inspiration for Khomeini was Shariati's Marxist reading of Shia theology. Khomeini heavily borrowed from Shariati's revolutionary mode which he saw as necessary to move towards the revolutionary moment. Like Shariati, he imported the idea of class struggle from the Marxist ideology which he embellished with an Islamic terminology. For Khomeini, the root cause of all conflicts in the world as a conflict between the 'oppressors' and the 'oppressed.'[279] Khomeini adopted a global vision in defining the content of both terms, where he more than frequently defined 'oppressors'

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[276] Milani, *Iran's Islamic Revolution*, p. 89.

[277] For an extended discussion on the government of the jurist, see Vanessa Martin, *Creating An Islamic State: Khomeini and the Making of a New Iran* (New York: I.B. Tauris, 2003), Chapter 5.

[278] Nasr, *The Shia Revival*, p. 126.

[279] See Ruhollah Khomeini, *Governance of the Jurist: Islamic Government* (Tehran: The Institute for Compilation and Publication of Khomeini's Works, 2008), p. 25.

as the capitalist, imperialist Western countries as well as their monarchical allies in the Middle East, and 'oppressed' as the deprived Muslim populations of the Middle East.[280] Seeing the quietist ulama in these countries as indirectly contributing to this oppression, Khomeini propagated for a proactive religious leadership to liberate the peoples living under these regimes. He actively promoted the discourses of justice, right, and equality in framing the call for proactive intervention. In an ideologically divided world where American capitalism and Soviet communism stood against one another, Khomeini proposed Islamism as a third way for liberation and emancipation. He saw the Islamic awakening inaugurated in Iran with 1979 Revolution as the first step of a world-wide movement, where all the oppressed peoples would mobilize against the oppressors by emulating the Iranian example.

Figure 1. From Ijtihad to the Islamic Revolution of 1979
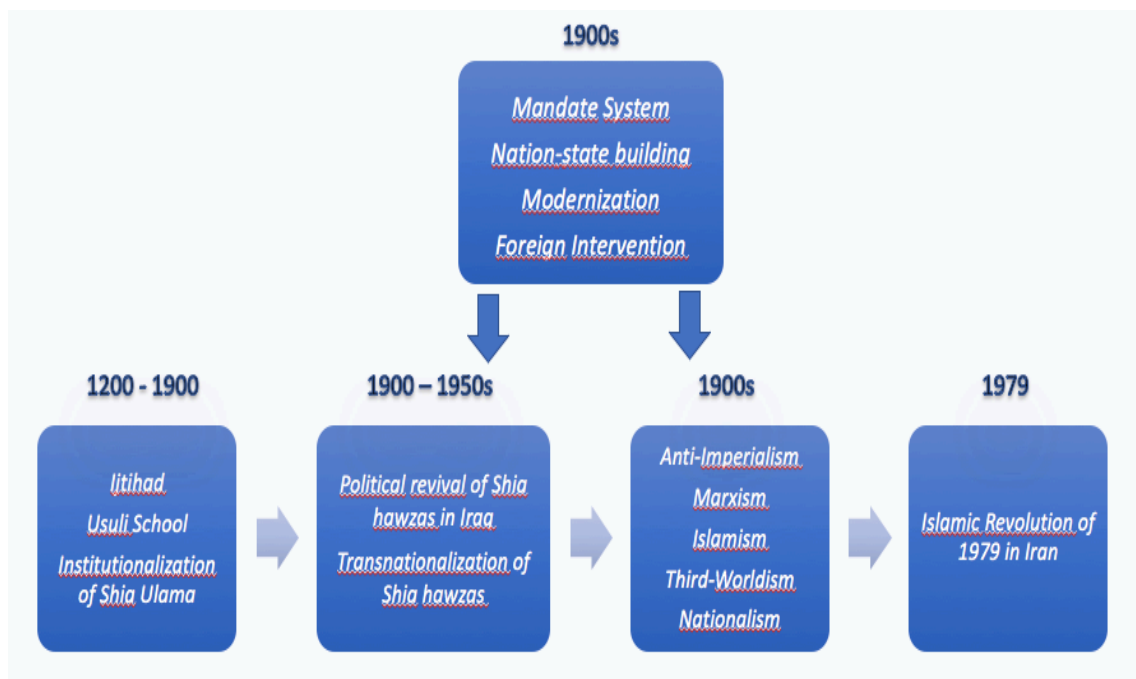
The 1979 revolution in Iran has a large socio-political and vibrant intellectual background, of which only a sketch has been provided within the scope of this study. It should be noted that the critical junctures and intellectual movements discussed above are selected to prepare the historical background for the evolution of the revolutionary

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[280] Ibid., p. 30.

regime's foreign policy and the list of the intellectual and political currents provided here is not exhaustive. Several conclusions can be derived from this discussion. First, the Shia *ulama* has played a central role in the Islamic Revolution. Over centuries, the Shia *ulama* has developed an institutional capacity to act as an independent political force by the 19th century through the development of *ijtihad* and *Usuli* school. The penetration of the nation-state system after World War I in the Middle East; the fall of the Caliphate; and the ambitious and top-down programs of nation-state building and modernization administered by Middle Eastern rulers have disturbed the interests of the *ulama* under the nation-state. However, the social and intellectual capital of the Shia *ulama* also featured them as modern political stakeholders and earnt them a mobilization capacity over the masses who were adversely affected by the nation-state building processes. While some *ulama* chose to maintain their traditional political quietism in Najaf, some others actively engaged in Islamist political party formation and revolutionary action. As such, an emerging Islamist political activism and religious intellectual environment characterized the Middle East region well before 1979. Second, the socio-political context and the intellectual movements in Iran culminating in the revolution were a part of this broader context in the Middle East. Ayatollah Khomeini was inspired by the politically activist Shia *ulama* and the Islamist political movements in Iraq during his exile. As such, the Shia faith gradually emerged as an indigenous, nationalist resistance force against the Shah regime. Third, the Shia theological-intellectual movement was not independent from the inspiration of modern ideologies and secular intellectual thoughts either. Marxism, anti-imperialism, third-worldism and anti-Western modernism were the featured ideological and intellectual currents in this respect. Leading *ulama* and lay Shia thinkers of the time merged these multiple religious and secular ideologies more than frequently in an untraditional and original way. Fourth, the Karbala narrative of the Shia faith was used as the central mobilizational component for a successful revolution. The scholars reframed the Karbala Battle as a class struggle, or the first instance of a centuries-old global struggle between the 'oppressor' and the 'oppressed,' and hailed Imam Hossein's martyrdom as a human virtue necessary for revolutionary action. Finally, the revolution of 1979 established a Shia theocracy based on Ayatollah Khomeini's *velayet-e faqih*. The new regime's ideology can be defined as 'revolutionary Islamism.' Nevertheless, 'revolutionary Islamism' is not merely based on Shiism and Islamism; rather, it is a careful and neat amalgamation of both Islamist and secular intellectual elements that fed into the revolutionary moment in Iran. Accordingly, revolutionary

Islamism is an amalgamation of politically activist Shiism, third-worldism, Marxism, revolutionism, anti-Americanism, anti-imperialism, and anti-Western/Islamist modernism. Both Shia theocracy and revolutionary Islamism would have far-reaching impact on the Islamic Republic's mode of existence as a revolutionary and anti-systemic state in the international system and thus shape its course of foreign policy.

3.4. The Foreign Policy of the Islamic Republic During the First Decade

The historical and intellectual background leaves us with several cues on the course of Iran's foreign policy after 1979. First, Iran's foreign policy after 1979 should be treated as the foreign policy of a revolutionary regime. Second, the Islamic revolutionary movement in Iran is not separate from the greater Shia revival masterminded by influential Shia clerics and lay intellectuals in the 20th century across the region. Third, the revolutionary regime in Iran is based on a peculiar theocratic regime, which is inscribed into the Article 57 of the Islamic Republic's Constitution as *velayet-e faqih*, which presumes 'the supervision of the absolute authority of the command (velayat-e amr) and religious leadership (imamate) of the community of believers.'[281] Fourth, the ideology of the revolutionary regime can be defined as 'revolutionary Islamism,' which is a careful and innovative blend of political Islam, revolutionism, Twelver Imamate Shiism, Persian nationalism, anti-liberal modernism, and anti-imperialism. Altogether, religion is featured as a central element of the revolutionary regime. Religion defined the regional *interaction context* within which the revolutionary regime maneuvered, the *identity* of the regime, and the *ideology* regime. The question at this point is to what extent religion has been featured in Iran's foreign policy as well.

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[281] See 'The Constitution of the Islamic Republic of Iran,' http://www.wipo.int/edocs/lexdocs/laws/en/ir/ir001en.pdf.

Figure 2. The ideology of the Islamic Republic of Iran
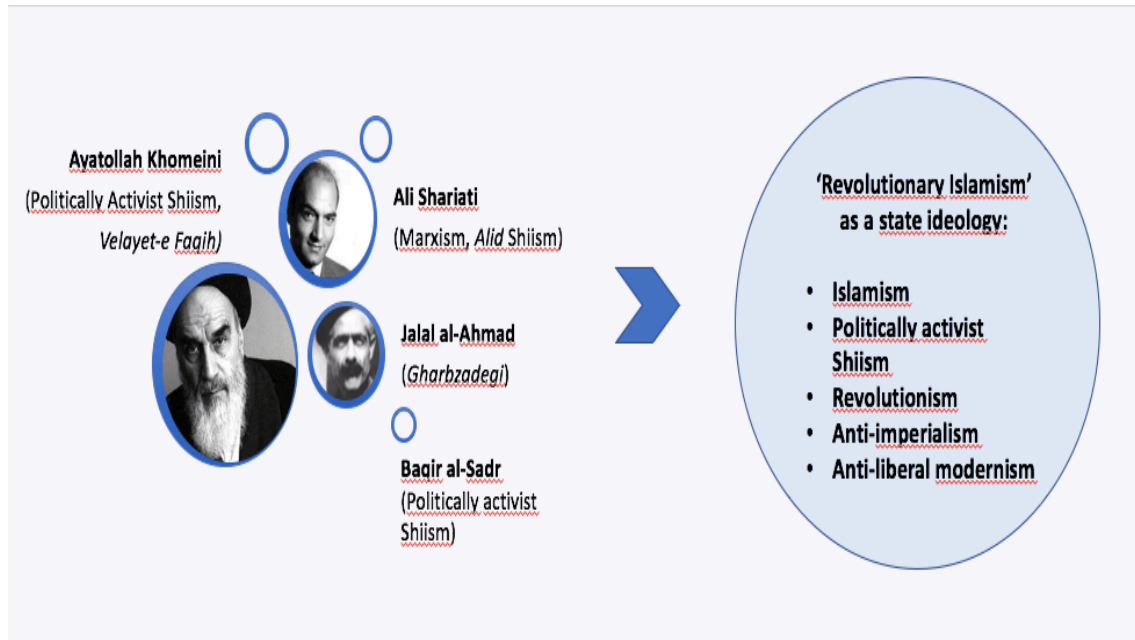
Foreign policy experts who have been interviewed during the field research have repeatedly emphasized the role of identity and ideology in Iran's foreign policy. According to Interviewee 8, 'Identity is very crucial in Iran's foreign policy,' as it defines the content of national interests, upon which relevant tools and strategies are determined.[282] What could confuse the analyst is the complicated nature of the Islamic Republic's identity and its implications on foreign policy. This is pointed out by some interviewees. Saghafi-Amari defines the Iranian identity as 'composed of three themes: the Islamic thought, the Shia identity, and Iranian culture.'[283] In a similar vein, interviewee 8's account points out to Islam and Shiism on the one hand, and Iranian nationalism and civilization on the other, as simultaneously constituting the Islamic Republic's state identity. The coexistence of 'Islamism' and 'Iranian nationalism' in Iran's

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[282] Interviewee 8, professor of international relations at Tarbiat Modarres University and expert on international relations and political economy at Center for Strategic Research. Interview with the author, conducted on September 16, 2016 at Tarbiat Modarres University in Tehran, Iran.

[283] Nasser Saghafi-Ameri, former senior Iranian diplomat and former foreign policy expert specialized on Iran's relations with the West, nuclear proliferation, and international security at Center for Strategic Research. He served diplomatic missions at the Iranian Embassies in Ottawa, Stockholm, and New Delhi. He was also part of the Iranian delegation to the United Nations Conference on Disarmament in Geneva and to the UN General Assembly in New York. Interview with the author, conducted on August 22, 2015 at CSR, Tehran, Iran.

revolutionary ideology creates ontological complications and foreign policy confusions for the Islamic Republic. As discussed before, the Islamic Republic is a Westphalian type of nation-state, where the national security priority lies in the survival of this territorial unit. On the other hand, revolutionary Islamism and Shiism shifts the analytical focus from the Iranian state to the greater Islamic community, the *Ummah*. The ontological duality of the regime reflects Iran's decades-old foreign policy dilemma: Will the Islamic Republic continue to exist as a Westphalian nation-state that conforms to the norms, rules, and principles of the existing international system with a priority of ensuring its survival within this system? Or will it be a revisionist state committed to the priorities of the transnational Islamist movement it came from and to the transformation of the existing system?

Figure 3. Between Nation State's Interests and Transnational Interests
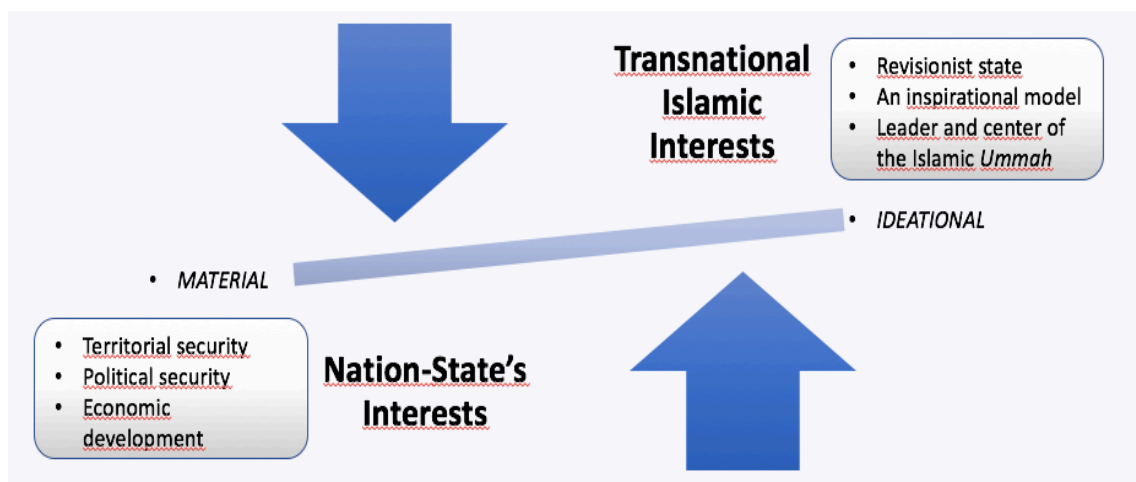
These questions have intrigued foreign policy analysts on Iran, where most analysts evaluated the Iranian foreign policy as fluctuating between realism/pragmatism and ideology, between the self-ascribed roles and circumstantial realities, and between the nation-state interests and the *Ummah*'s interests. Most analysts agree on the proposition that the Islamic Republic's early foreign policy is ideologically-driven, where the revolutionary Islamist identity and ideology plays a central role.[284] On the other hand,

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[284] See R. K Ramazani, 'Ideology and Pragmatism in Iran's Foreign Policy,' passim; Soltani and Amiri, 'Foreign Policy of Iran After Islamic Revolution,' passim; Farideh Farhi and Saideh Lotfian, 'Iran's Post-Revolution Foreign Policy Puzzle,' in *Worldviews of Aspiring Powers: Domestic Foreign Policy Debates in China, India, Iran, Japan, and Russia*, ed. Henry R. Nau and Deepa Ollapally (Oxford: Oxford University Press, 2012); Shireen Hunter, *Iran's*

these and other analysts also argue that the ideological aspirations of the revolutionary regime is curbed by pragmatist necessities and the primacy of nation-state's interests in the post-1989 period, where they defined Iran's foreign policy moving away from ideology to greater realism and pragmatism.[285] One central argument of this thesis is that the Islamism has been carried over decades in Iran's foreign policy. Before expanding this argument in the following chapters, we need to examine Iran's ideological foreign policy under the revolutionary period and two grand themes associated with this period: The Holy Defense War and the export of the revolution.

3.4.1. Iran-Iraq War of 1980-88: The Holy Defense War

On 22 April 1980, the Saddam regime in Iraq initiated a sudden military attack against Iran, which led to an eight-year-long war between two countries. Analysts initially invoked territorial reasons to understand the outbreak of the war, as Iran-Iraq relations had been ridden by territorial disputes and double sovereignty claims well before the revolution.[286] One of the disputed territories was Shatt al-Arab, a waterway of 130 miles in total, the last 55 miles of which constitute the Iraq-Iran border.[287] Both states have strategic and economic calculations regarding the region, as Iraq has a port with an opening to the Gulf and there are large oil reserves in the region.[288] Due to its strategic importance, the area was a matter of dispute between the Ottomans and Persians as early as the 1820s, which led to several border treaties between the Ottomans and Persians, and

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Foreign Policy in the Post-Soviet Era: Resisting the New International Order (Santa Barbara: Praeger, 2010); Suzanne Maloney, 'Identity and Change in Iran's Foreign Policy,' in *Identity and Foreign Policy in the Middle East*, eds. Shibley Telhami and Michael Barnett (Ithaca: Cornel University Press, 2002).

[285] David Menashri, 'Iran's Regional Policy: Between Radicalism and Pragmatism,' *Journal of International Affairs* 60, no. 2 (2007): p. 153-167; Anoushirevan Ehteshami, 'The foreign policy of Iran,' in *The foreign policies of Middle East States* (Boulder, Co.: Lynne Rienner, 2002), p. 283-309; Ray Takeyh, *Guardians of the Revolution: Iran and the World in the Age of the Ayatollahs* (Oxford: Oxford University Press, 2009); R. K Ramazani, 'Iran's Foreign Policy: Independence, Freedom and the Islamic Republic,' in *Iran's Foreign Policy: From Khatami to Ahmadinejad*, eds. Anoushiravan Ehteshami and Mahjoob Zweiri (Reading: Ithaca Press, 2008); Daniel Byman, Shahram Chubin, Anoushiravan Ehteshami, and Jerrold Green, *Iran's Security Policy in the Post-Revolutionary Era* (Pittsburgh: RAND Corporation, 2001).

[286] Dilip Hiro, *The Longest War: The Iran-Iraq Military Conflict* (New York: Routledge, 1991), p. 7-40.

[287] Will D. Swearingen, 'Geopolitical Origins of the Iran-Iraq War,' *Geographical Review* 78, no. 4 (1988): p. 408-409.

[288] Saskia Gieling, *Religion and War in Revolutionary Iran* (London: I.B. Tauris, 1999), p. 13.

then the subsequent regimes of Iraq and Iran.[289] However, the treaties were repeatedly un-made and re-made, leaving the issue at a stalemate for the coming periods. Another disputed area was the Iranian Khuzestan province, which is heavily populated by ethnic Arabic tribes. The Arab fabric of the community strengthened the Arab-nationalist Saddam regime's claim that Khuzestan was a part of Iraq, while Iran saw the region as its natural component.[290] A third territorial dispute was over three small islands close to the Strait of Hormuz, Abu Musa, Greater Tunb and Lesser Tunb.[291] While two of these islands belonged to United Arab Emirates, the Iranian Shah laid claim over them in 1970s, which further drew Iraq to the game of sovereignty claims on the islands due to their strategic importance.

Nevertheless, the territorial disputes and double sovereignty claims had already been partially settled by the sign of Algiers Agreement between two countries in 1975.[292] Therefore, analysts sought Saddam's decision to declare war against Iran in the geopolitical and domestic circumstances generated by the Islamic Revolution in 1979. As a matter of fact, the territorial disputes had already reflected decades-long geopolitical rivalry between the pan-Arabist Iraq and Persian Iran, and the Sunnis and the Shiites.[293] The Islamic revolution and the ensuing regime change created a moment of vulnerability for Iran in this geopolitical power game. The leaders of the new regime were investing the country's resources for the formation and institutionalization of the new regime. The Iranian army, the *Artesh*, was partly disbanded by the new regime due to their supposed allegiance to the *ancien regime*.[294] The war thus caught Iran militarily unprepared and unwilling to engage in any external conflict during the early revolutionary period. Under

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[289] Swearingen, 'Geopolitical Origins of the Iran-Iraq War,' p. 409.

[290] Gieling, *Religion and War in Revolutionary Iran,* p. 13.

[291] Gary Sick, 'Trial by Error: Reflections on the Iran-Iraq War,' *Middle East Journal* 43, no. 2 (1989): p. 234.

[292] 'Iraq and Iran Sign Accord to Settle Border Conflicts,' *The New York Times*, March 7, 1975, https://www.nytimes.com/1975/03/07/archives/iraq-and-iran-sign-accord-to-settle-border-conflicts-iraq-and-iran.html.

[293] On an extended account of how communal identity and state ideology impacted the rivalry between Iraq and Iran, see Majid Khadduri, *The Gulf War: The Origins and Implications of the Iraq-Iran Conflict* (New York: Oxford University Press, 1988).

[294] See Ahmad S. Hashim, 'The Iranian Military in Politics, Revolution, and War, Part 2,' *Middle East Policy Council*, accessed May 23, 2018, https://www.mepc.org/iranian-military-politics-revolution-and-war-part-two.

these adverse circumstances on the part of Iran, a window of opportunity was clearly opened for Iraq to claim regional leadership and the conditions seemed extremely ripe.

Enjoying its advantageous position at the beginning of the war, the Baathist regime expected to win a definitive victory in a couple of months.[295] Saddam's forces captured the largest Iranian port of Khorramshahr on the West and surrounded the city of Abadan, the largest cities with oil refineries in 1980.[296] Both Ayatollah Khomeini and Bani Sadr government were suspicious about the *Artesh*, as the leadership in early 1980 was still more concerned about any anti-revolutionary element inside the country than any external threat.[297] But once the war erupted, the Iranian regime had to deploy the *Artesh*. Nevertheless, the *Artesh* was joined by a parallel military institution in the fight against Iraq, the Islamic Revolutionary Guards Corps (IRGC). The IRGC was a religious-revolutionary institution, whose original task was 'to protect and preserve the Islamic Revolution and its gains.'[298] There was a division of labor between the two sets of armies: whereas the *Artesh* was responsible to protect the Iranian state and its borders against external threats, the IRGC was originally tasked with protecting the revolutionary Islamic regime against externally and internally defined counter-revolutionary threats. The Iranian regime framed Saddam's invasion as an aggression and threat against the Islamic revolutionary regime and its achievements, which created the ground for the IRGC to push for their relevance over the war. The IRGC and *Artesh* were further assisted by an ideological militia formation called the *Basij*, who were the volunteering youth militia trained for fighting by the IRGC.[299] The military offspring of the revolution and war, both the IRGC and the *Basij*'s war approach reflected an element of revolutionary fervor, which was embellished with Shia narratives of self-sacrifice and martyrdom, and fought against Saddam's forces with human wave tactics.[300]

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[295] For an extended timeline of the war, see Pierre Razoux, *The Iran-Iraq War*, trans. Nicholas Elliott (Cambridge: The Belknap Press of Harvard University Press, 2016), p. 495-510.

[296] Stuart Auerbach, 'Iraq: Khorramshahr Captured,' *The Washington Post*, October 25, 1980, https://www.washingtonpost.com/archive/politics/1980/10/25/iraq-khorramshahr-captured/adcc73ca-b8c6-46d9-8b68-225045af1fb6/?noredirect=on&utm_term=.5baff6b3d52e.

[297] Shahram Chubin and Charles Tripp, *Iran and Iraq at War* (London: I.B. Tauris, 1988), p. 35.

[298] Ibid., p. 44.

[299] 'Islamic Revolutinary Guard Corps,' *Counter Extremism Project*, accessed April 26, 2017, https://www.counterextremism.com/threat/islamic-revolutionary-guard-corps-irgc.

[300] See Maryam Alemzadeh, 'The Islamic Revolutionary Guards Corps in the Iran-Iraq War: An Unconventional Military's Survival,' *British Journal of Middle Eastern Studies* (2018),

Once they successfully took Khorramshahr back from Saddam's forces in 1982, the Iranian regime saw the utility of the revolutionary army and militia in compensating for their weakness in conventional capabilities. Saddam had miscalculated the duration of war and was now thinking of withdrawing from the war due to the Israeli invasion of Lebanon in 1982. On the other hand, their achievements in Khorramshahr encouraged the IRGC to continue with the war. Between 1982 and 1984, the Iranian regime's military position changed from defense to offense. During this period, Iran moved the war across the Iraqi border to incorporate the heavily Shia-dominated constituencies. The initial expectation was that the common Shia identity would encourage the Iraqi Shias to unite with the Iranian regime against the Saddam regime. Overall, Iraqi nationalism outbalanced Shia identity and not all Iraqi Shiites revolted against the Saddam regime despite their complicated relationship. Nevertheless, the Iranian involvement with the Shias earnt Iran one of its most profitable allies not only for the period of the war, but also for the post-Saddam period: The Supreme Council of Islamic Revolution in Iraq, a.k.a SCIRI.

As discussed before, a Shia political revival was underway in Iraq as early as 1950s. Mohammad Baqir al-Sadr had formed Islamic Dawa party in Iraq in the 1950s.[301] The Dawa Party emerged as a Shia political party that aimed to gradually proselytize the society, seize political power and establish an Islamic theocracy in Iraq.[302] The party continued to function as an anti-Baathist political force in the next decades, despite the political suppression it faced under the Baathist regime. The Islamic Revolution of 1979 was a critical moment for the Baath regime though, where the Shia activists felt encouraged by the success of the revolution in their neighbor and toned up their anti-Baathist rhetoric.[303] This was followed by an extensive anti-Shia repression across Iraq, which lead to the execution of Mohammad Baqir al-Sadr. Faced with the extent of state repression against Shia political activism mounting, many Shia political activists took

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https://doi.org/10.1080/13530194.2018.1450137.

[301] 'Shiite Politics in Iraq: The Role of the Supreme Council,' *International Crisis Group Middle East Report* 70, November 15, 2007, p. 2, http://www.refworld.org/pdfid/473d5d632.pdf.

[302] Ibid.

[303] Ibid.

shelter on the side of the border on the early days of the war, including Mohammad Baqir al-Hakim, who was a son of the famous clerical al-Hakim family.[304]

The movement of Shia clerics and political activists from Iraq created a significant opportunity for the Iran, where the Iranian regime organized various Iraqi Shia elements into an umbrella organization called the Supreme Council of the Islamic Revolution in Iraq.[305] Defining itself as 'a government in exile,' the SCIRI had important Shia clerical and political figures among its cadres including Mohammad Baqr al-Hakim, who represented the Iraqi *marjaiyya*, the Dawa Party member Kathem al-Haeri, and independent Shia clerics and political activists such as Ayatollah Mahmoud al-Hashimi Shahroudi, Ali al-Haeri, and Mohammad Taqi al-Modarrasi.[306] SCIRI soon adopted Khomeini's *velayet-e faqih* and the objective to establish an Iranian-style Islamic theocracy in Iraq.[307] The IRGC also trained another force that acted both as an intelligence-gathering unit and military operations wing to SCIRI called the Badr Brigades.[308] With their ideological embrace of *velayet-e faqih* and military activities against the Arab-nationalist Saddam regime, SCIRI became a powerful ally and Badr an efficient proxy to Iran during the war. SCIRI thus replaced Dawa Party as a central resistance force against the Iraqi regime.

The war was extended from the Iran-Iraq border away to the Persian Gulf in 1983, when Saddam's forces attacked Iran's offshore oil facilities and caused an oil spill-over that impacted the Gulf countries.[309] In 1984, Iraq went as far as blocking the Karg Island, one of the most important oil facilities of Iran, and targeting foreign oil tankers.[310] The extension of the war into the Gulf was a direct threat to the global economy, where the prolongation of the war was only contributing to the potential economic risks for the

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[304] Ibid.

[305] Phebe Marr and Ibrahim Al-Marashi, *The Modern History of Iraq* (New York: Routledge, 2017), p. 154-158.

[306] 'Shiite Politics in Iraq,' *International Crisis Group Middle East Report*, p. 3, http://www.refworld.org/pdfid/473d5d632.pdf.

[307] Marr and Al-Marashi, *The Modern History of Iraq,* p. 154-158.

[308] 'Shiite Politics in Iraq,' *International Crisis Group Middle East Report*, p. 4, http://www.refworld.org/pdfid/473d5d632.pdf.

[309] Gieling, *Religion and War in Revolutionary Iran*, p. 24.

[310] Ibid.

international community. As a result, France, the USA, and the Gulf countries found themselves involved as sides to the conflicting parties. This phase of the war is important in shaping the war alliances for both parties, which would also inform Iran's core allies for the coming decades. France was one of the main supporters of Iraq during the war and delivered military equipment and missiles to Iraq.[311] The Carter Administration in the USA had seemingly announced neutrality, which was in fact a policy of dual containment against Iraq and Iran.[312] On the one hand, the US-Iran relations were already tense since the Islamic Revolution, particularly due to the Hostage Crisis of 1979, and any reversal of the Islamic Revolution by a successful Iraqi operation would thus be a welcome outcome for the USA. The US administration was negotiating with the Iranian regime to release the hostages in exchange for providing military equipment and lifting the freeze on Iranian assets.[313] On the other hand, once the Iranian forces outmaneuvered the Iraqi forces in 1982, the US Secretary of State George Schultz adopted the policy of containing the Iranian threat against the Gulf by supporting the Saddam regime.[314] Accordingly, The USA provided technological aid, military equipment, satellite intelligence, and chemical war technology to Iraq.[315] The USA also influenced the UN Security Council decisions regarding Iraq's use of chemical weapons against Iran, where the international community either took a mild tone or remained silent on Iraq's war crime.[316]

The Soviet and Chinese stance on the war was no different, where both countries benefited from the war economy and sold military technology to Iraq.[317] Nevertheless, a definitive let-down for Iran was caused by the extensive regional support for Iraq, where the Gulf countries emerged as main beneficiaries even before the extension of the war to the Persian Gulf. Saudi Arabia, whose relations with revolutionary Iran was rigged due

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[311] Rezoux, *The Iran-Iraq War*, p. 161-162.

[312] Ibid., p. 80-81.

[313] Ibid.

[314] Ibid., p. 206.

[315] For a detailed chronology of US military, intelligence, political support to Iraq during the war, see Mark Phythian, *Arming Iraq: How the US and Britain Secretly Built Saddam's War Machine* (Boston: Northeastern University Press, 1997).

[316] Rezoux, *The Iran-Iraq War*, p. 300-301.

[317] For an analysis on the Soviet stance on the war, see Robert Litwak, 'The Soviet Union and the Iran-Iraq War,' in *The Iran-Iraq War: Impact and Implications*, ed. Efraim Karsh (New York: Palgrave Macmillan, 1989).

to the latter's denunciation of the Saudi regime as an 'un-Islamic' institution ruled by 'corrupt men' that used oil revenues for American demands in the region, sided with Saddam and provided 10 Billion Dollar loans.[318] Kuwait had already disclosed its support for Iraq by providing logistical support and a total of 6 billion Dollars by 1981 – in the early times of the war.[319] Qatar and the United Arab Emirates maintained a general policy of neutrality due to internal differences of opinion regarding the war. However, the pro-Iraqi Emirates and Qatar also provided financial aid to Iraq with a value of 1-3 billion Dollars and 1 billion Dollar respectively by 1981.[320] Amid increasing international and regional support to Iraq in financial, diplomatic, and military terms, Iran felt heavily isolated and marginalized in the region. The only regional player supporting Iran was the Syrian regime. Strategic considerations brought Iran and Syria together in early 1980s, where the political isolation of Syria on the Palestine-Israeli conflict following the Camp David Accords, the congruence of Syrian and Iranian interest in Lebanon regarding the political empowerment of Lebanese Shias, and Syria's rivalry with another Baathist regime in Iraq brought both countries closer.[321] The Assad regime provided intelligence support to Iran, secretly transferred Soviet-made weapons, concluded an arms deal, signed trade agreements, and closed the Iraqi pipelines crossing the Syrian lands upon an oil deal with Iran in 1982.[322] The Syrian-Iranian alliance that was formed during the Iran-Iraq War proved to be extremely robust over the years and dictated the course of the Syrian conflict after 2011. Therefore, the Syrian-Iranian alliance of 1980s is of immense importance and has far reaching implications for the post-2011 regional balances.

The war inscribed ineffaceable marks in the political consciousness of the revolutionary regime in Iran. The 'war of the cities,' where each party targeted major urban centers, inflicted great destruction on Iranian cities, civilian populations, industrial centers, and oil installations.[323] Economic devastation was immense due to a drop in oil

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[318] Hiro, *The Longest War,* p. 75-76.

[319] Ibid., p. 77.

[320] Ibid.

[321] For an extended analysis on Syria-Iran alliance, see Jubin M. Goodarzi, *Syria and Iran: Diplomatic Alliance and Power Politics in the Middle East* (London: Tauris Academic Studies, 2006); and Hussein J. Agha and Ahmad S. Khalidi, *Syria and Iran: Rivalry and Cooperation* (London: Pinter Publishers, Royal Institute of International Affairs, 1995).

[322] Hiro, *The Longest War,* p. 80.

[323] 'How Saddam's 'War of the Cities' Spawned Iran's Missile Drive,' *The Arab Weekly*, March 25, 2018,

prices, the rising inflation, and chronic unemployment.[324] Iranian economic infrastructure and civilian populations were thus greatly harmed due to the war, where the human cost reportedly reached 300 thousand Iranians.[325] Western and Arab support to Iraq only aggravated the devastation and the hardships on the part of the revolutionary regime. It could be argued that the 1980-88 war made the Islamic Republic *a la* Tilly, as it irrefutably shaped the ideological consolidation of and the institutional structure of the Islamic Republic.[326] Ideologically, the war fostered the anti-imperialist, religious identity of the Islamic Republic. The Western and Arab support of Iraq at the expense of Iranian populations and cities perpetuated the revolutionary regime's lack of trust to the 'unjust' international system. Feeling extremely isolated both at the regional and international level, Khomeini re-invoked the theme of the revolutionary discourse of 'independence' and 'self-reliance' and extended his 'neither East, nor West' philosophy to foreign policy realm.[327] Moreover, the war also perpetuated Khomeini's central discourse regarding the international system, i.e. the 'oppressors' nations vs. the 'oppressed.' The war was discursively framed in Iran as the 'oppression' of the Islamic Republic by the modern, capitalized, Western powers which, in the Iranian discourse, extended cutting-edge military technology to Iraq at the expense of the immense cost on Iran. The war was a 'defensive *jihad*' in the Iranian political discourse, as it was fought not only against the Iraqi regime but against a broad international community that allegedly aimed to reverse the revolutionary achievements.[328] The war was fought against Western powers, Western imperialism and capitalism, and their Arab allies in the region. The ideological references earnt the war a sense of sacredness and the Iranian regime officially referred the war 'holy defense war,' 'sacred war,' and 'imposed war.'

https://thearabweekly.com/how-saddams-war-cities-spawned-irans-missile-drive.

[324] Abbas Alnasrawi, 'Economic Consequences of the Iraq-Iran War,' *Third World Quarterly* 8, no. 3 (1986): p. 878-880.

[325] 'Iran-Iraq War (1980-1988),' *Global Security*, accessed 27 May, 2017, https://www.globalsecurity.org/military/world/war/iran-iraq.htm.

[326] For an extended discussion of how 'war made state' in Europe, see Charles Tilly, *Coersion, Capital and European States AB 990 – 1992* (Oxford: Blackwell, 1990).

[327] See Ayatollah Khomeini's March 21, 1980 speech on MERIP, 'Khomeini: We Should Confront the World with Our Ideology,' *Middle East Research and Information Project*, accessed 26 May, 2017, https://www.merip.org/mer/mer88/khomeini-we-shall-confront-world-our-ideology.

[328] Chubin and Tripp, *Iran and Iraq at War*, p. 48.

Like the revolutionary moment of 1979, the Islamic and Shia faith elements played a crucial role in mobilizing the Iranian human resource for the war as well. The holiness and sacredness of the war also came from the fact that 'the holy defense' discourse relied extensively on the employment of Qur'anic concepts, Shia narratives, and Shia symbolism. When Iraq executed the first military attack on Iran, Ayatollah Khomeini's response was to invoke the Islamic concept of *jihad,* i.e. a war which would be fought with the participation of everyone within the society for the collective defense of the Islamic revolution, it ideology, institutions, and values.[329] *Jihad* implied a collective mobilization of the country's overall resources for the defense of the Islamic regime and revolutionary ideology. A defensive *jihad* as such was not limited to the battlefield, but it was to be embraced as a moral duty by all individuals of the Islamic regime in the workplaces, universities, and market places and implied the total mobilization of the Iranian society for the defense of the revolutionary values.[330] The anti-imperialist discourse was also framed in Islamic concepts. The Western powers' interference with the war was framed as *fitna*, caused by their colonialist temptations and 'arrogance.'[331] The war itself was another link in the chain of the battle between *haqq* and *batil* throughout history and a test, i.e. *imtihan*, and 'experiment' on the capacity of the Islamic regime to choose *haqq* or 'truth' and on their endurance to defend the Islamic ideals.[332]

One challenge concerning the war for Iran was how to legitimize the fight against fellow Muslims in Iraq. In this respect, the Iranian regime categorized Saddam and the Baath regime as *bughat*, i.e. as dissenter of the faith.[333] The Iranian leadership and influential clerics of the time defined the Baath regime as a dissenter, as according to this discourse, they acted contrary to the Muslim interests, deceived the populations, and committed themselves to the overthrow of an Islamic system in Iran.[334] Imam Khomeini invoked Shia imageries in legitimizing the war against another Muslim country in this respect, where he equated the Iranian struggle against Baathist regime to that of Imam Ali

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[329] Gieling, *Religion and War in Revolutionay Iran*, p. 45.

[330] Ibid.

[331] Ibid., p. 58.

[332] Ibid., p. 59-60.

[333] Ibid., p. 51.

[334] Ibid.

against Muslim rulers of the time, saying Imam Ali did not fight against Muslims but against those Muslims who did not choose *haqq* and remain true to the Islamic faith.[335] A related Shia concept was *kufr,* which theologically meant recognizing the God, but not acknowledging his order with words and action, thereby neglecting the faith and the *ummah*.[336] In the Iranian usage *kufr* referred to the 'enemies' of the Islamic Republic.[337] In the war discourse, *kufr* had two connotations. The notion first referred to any state that saw the Islamic Republic and its Islamic ideology as a threat and opposed to Iran. The Iranian leadership used the notion to refer to US imperialism and 'global arrogance,' i.e. *estekbar*, the Soviet Union, and any of their allies.[338] Secondly, *kufr* could also be Muslim enemies, as in the case of *takfir*, which referred to Wahhabi movements that declared others as dissenters and legitimized war against them.[339] The Iranian leadership used *kufr* as any state or ideology that did not conform to the values, principles, and revolutionary ideology of the Islamic Republic during the war. 'The holy war' was thus framed as a sacred struggle to defend the fledgling Islamist regime and its ideology. It was a *jihad* against *kufr,* all international forces and their regional allies, that aimed to reverse the achievements of the Islamic Revolution in the Iranian war discourse.

Perhaps the most widely used concept during the war was *shahada*, which referred to the act of 'self-sacrifice' and 'martyrdom' during the *jihad.* While notions of *fitna, kufr, jihad, bughat,* and *takfir* legitimized the war by framing it as a moral duty against the opponents of the Islamic order, the notion of *shahada* implied the mobilizational strategy of the Iranian regime. *Shahada* was closely linked to the mobilization of Iranian men and youth for the ideological security organizations of the Islamic Republic, i.e. the IRGC and *Basij* forces. While martyrdom and self-sacrifice are central tenets of Islamic *jihad* in general, the notion of *shahada* has a peculiarly profound place in Shia faith due to its centrality to Karbala. As discussed above, the Shias have traditionally treated Imam Hossein's self-sacrifice and martyrdom against the Umayyad Dynasty at the battle of Karbala in the 7th century AD as a resistance. The Karbala event was inscribed in the Shia

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[335] Ibid.

[336] Ibid., p. 80.

[337] Ibid.

[338] Ibid., p. 82.

[339] Ibid., p. 81.

narratives and symbolism as a moment of resistance and Imam Hossein's struggle and perseverance as self-sacrifice for the greater good of the Islamic community.[340] Imam Jafar al-Sadiq's 'Every day is *Ashura*; every land is Karbala!' was a frequently used slogan during the Iranian revolution.[341] The 'culture of Ashura' had thus already attained a central place in the Shia collective psyche motivating collective action over centuries and the Iranian leadership invoked emotional attachment to Karbala by extolling martyrdom first during the revolution and later for the war. The primary objective was to find recruits for the IRGC and volunteer fighters for the *Basij.* A secondary objective was to encourage the population's resistance against all infrastructural, economic, military implications of the war. Therefore, a large propaganda sector promoting the notion of *shahada* developed in Iran. The *mullahs,* clerics, and political leaders preached on the virtue of martyrdom, perseverance, and 'selfless struggle.'[342] The Iranian cinema industry shot hundreds of movies narrating the stories of war martyrs.[343] Tehran's streets were named after the martyrs of the war and were decorated with wall paintings depicting them.[344] In short, *shahada,* Karbala paradigm, and Ashura culture were consistently invoked to ensure collective mobilization during the Holy Defense.

The 'holy defense war' has an immense role in defining Iran's early experience with the external world as a revolutionary regime. The Iranian regime defined who is an ally and who is enemy for the first time during this war. The war proved the marginalization of Iran as an anti-Americanist, anti-systemic, revolutionary Islamist regime with the region, where most of the Middle Eastern states allied with Iraq. The extreme cost of the war on Iran and the international and regional marginalization of Iran constituted the strategic loneliness and isolation of Iran in the coming decades. However, a more critical impact of the war on the Islamic Republic is the further institutionalization

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[340] See the section on Karbala Paradigm in Gieling, *Religion and War in Revolutionay Iran*, p. 113-126.

[341] See Stephen Poulson, *Social Movements in the Twentieth Century Iran: Culture, Ideology, and Mobilizing Frameworks* (Plymouth: Lexington Books, 2006), p. 44-47.

[342] See Ayatollah Khamenei, 'Leader's Speech in Meeting with the Members of the Assembly of Experts,' *The Supreme Leader Ayatollah Khamenei Website*, September 23, 2010, http://english.khamenei.ir/news/2054/Leader-s-Speech-in-Meeting-with-Members-of-Assembly-of-Experts.

[343] The Cinema Museum of Iran has a large collection of Iranian war movies intended for praising Iran's war martyrs. See 'Main Page: The Cinema Museum of Iran,' The Cinema Museum of Iran Website, accessed June 3, 2018, http://cinemamuseum.ir/?p=MainPage.

[344] This information is based on the author's personal observations during field trips to Tehran in summer 2015 and 2016.

and empowerment of the Islamist military and security forces within the new regime. The Islamic Revolutionary Guard Corps and *Basij* are a case in point. As discussed, the IRGC is the outcome of adverse security circumstances that surrounded the nascent Islamic regime in its early years. While Iran's standing army *Artesh* was partially disbanded because of their allegiance to the Shah regime and hence the possibility of a coup d'état against the revolutionary regime, the internal and external circumstances necessitated an alternative military solution. The threats to the regime included the armed guerilla forces of two leftist groups *Mujahidin-e Khalq* and the *Fedaiyan-e Khalq,* the uprisings by Kurdish and Azari communities across the country, and the war with Iraq.[345] Externally, the Iran-Iraq War necessitated the mobilization of Iranian volunteers to fight alongside the weakened *Artesh*. The IRGC was created by the war conditions as a peculiar ideological army and has further gained power in non-military sectors of the Iranian regime following the war.

Ostovar defines IRGC as 'a multifaceted organization with reach into many different areas' as 'it is a security service, an intelligence organization, a social and cultural force, and a complex industrial and economic conglomerate.'[346] The IRGC was first mobilized during the war by the participation of untrained, unexperienced volunteers who 'learned to fight on the job.'[347] While the *Artesh* acted as the conventional military forces of the Islamic Republic during the war, the IRGC volunteers attacked the Iraqi forces by unconventional strategies such as guerilla warfare and human wave tactics.[348] Their unconventional tactics earnt them a fame during the war when they could repel Saddam's forces, which led to an elevated sense of success on the part of the IRGC, changed the Iranian position from one of defense to offense, and eventually led to the prolongation of the war. A clear division of labor between *Artesh* and IRGC is visible during its early formation. Accordingly, *Artesh* was the regular military of the Islamic Republic, responsible for the territorial defense of the country. On the other hand, the

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[345] Bayram Sinkaya, 'The Revolutionary Guards and the Iranian Politics: Causes and Outcomes of the Shifting Relations Between The Revolutionary Guards and the Political Leadership in Post-Revolutionary Iran' (PhD Thesis, Middle East Technical University, 2011), p. 58-59.

[346] Afshon Ostovar, *Vanguard of the Imam: Religion, Politics, and Iran's Revolutionary Guards* (New York: Oxford University Press, 2016), p. 5.

[347] Ibid., p. 65.

[348] Ibid., p. 66 and 75.

IRGC was both responsible for the defense of territorial borders and the Islamic regime. The latter defined the nature of the IRGC as an 'ideological army' which is committed to protecting the revolutionary ideology, the revolutionary regime, and the achievements of the revolution. As such, the IRGC was tasked with fighting against counter-revolutionary forces both at home and abroad.[349] This task is safeguarded by Article 150 of the Islamic Republic's Constitution.[350] The IRGC is directly responsible to *vali-e faqih* - the Supreme Leader – and takes orders from him. Their direct affiliation with the Leader and 'devotion to the leader' have earnt them increasing power within the system.[351]

The forces have an ideological mission and that mission is defined by Islam and Shiism. Karbala narratives of martyrdom and sacrifice formed the backbone of their mobilization during the Holy Defense War, where the imagery of the Imam Hossein, his selfless struggle, and self-sacrifice were portrayed as the guiding virtues of the Guards during the war.[352] The IRGC has perpetuated their image as an ideological army devoted to the protection of *velayet-e faqih* and revolutionary Islamism through social and cultural promotional activities. Some of the most influential news agencies in Iran are run by IRGC such as *Fars News Agency* and *Tasnim News*. They also regularly publish on their political views and activities on Payam-e Enghelab on their primary news outlet, *Sepah News*. 'Resistance' is a central discursive element of the IRGC since the war. Ostovar defines the element of 'resistance' as IRGC's 'perpetual state of being,' because these pro-regime forces are not opposing to another system, but are opposing to any opposition to the existing system.[353] Accordingly, the IRGC is in a perpetual state of resistance 'to actual, perceived, and existential threats to the Islamic Republic and its revolutionary system.'[354] The resistance was defined as military and political resistance to the international system, which did not want to allow the Islamic Republic's survival as well as to any internal opposition to the regime and *vali-e faqih* at home. As Chapter 5 will

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[349] See Behbod Negahban, 'Who Makes Iran's Foreign Policy? The Revolutionary Guards and Factional Politics in the Formulation of Iran's Foreign Policy,' *Yale Journal of International Affairs* 12, no. 33 (2017): p. 33-34.

[350] See Article 150 of the Constitution of the Islamic Republic of Iran, 'The Constitution of the Islamic Republic of Iran,' http://www.wipo.int/edocs/lexdocs/laws/en/ir/ir001en.pdf.

[351] Ostovar, *Vanguard of Imam*, p. 10.

[352] Ibid., Chapter 7.

[353] Ibid., p. 131.

[354] Ibid.

discuss in more detail, the nature of the friends, enemies, risks, and threats changed, the connotations and content of 'resistance' in the Islamic Republic's discourse have equally undergone modifications over time. However, the IRGC's emphasis on 'resistance,' its Islamic content and Shia form has remained unchanged.

The end of the Holy War gradually transformed the IRGC from a mere ideological army to an economic actor in the post-1989 era. President Rafsanjani first sealed the status of IRCG as a formal military force of the country, and then tasked the IRCG with the reconstruction of the war-torn country at all levels. When Rafsanjani initiated the privatization of the Iranian economy in 1990s, IRCG was given lucrative state contracts, and established the 'headquarters of self-sufficiency' and 'headquarters of reconstruction.'[355] The IRCG established several companies in industrial, agricultural, transportation, mining, construction, import and export sectors, all of which were later unified under a colossal industrial complex called Khatam-ol-Anbiya, which literally means 'the Seal of Prophets.'[356] Khatam-ol-Anbiya gradually extended its sectoral base, where it increased its activities in Iran's oil sector, became the only contractor in the gas sector, and expanded its activities to the telecommunications sector.[357] Besides, the IRGC has military-industrial complexes and is extremely active in Iran's banking and financial sector. The IRCG is also affiliated with *bonyads*, the Iranian foundations, such as Foundation for the Oppressed, Martyrs Foundation, and Foundation for Mutual Assistance, all of which further perpetuated the IRGC's social and economic influence within the regime.[358] The military and economic power of the IRGC was supplemented by an increasing political power at home as well. This first manifested during Khatami's reform movement, where the IRGC took a strict position as the defender of the Islamic regime against the reformers liberalizing policies in 1997. The political influence of the IRGC got further accentuated during Ahmadinejad's presidency, where he appointed IRGC staff into key governmental and bureaucratic position.

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[355] Mahtab Alam Rizvi, 'Evaluating the Political and Economic Role of the IRGC,' *Strategic Analysis* 36, issue 4 (2012): p. 591.

[356] Ibid.

[357] Ibid.

[358] Ostovar, *Vanguard of the Imam*, p. 147-148.

The *Basij* forces are the second important ideological forces of the Islamic Republic. They were initially formed as paramilitary forces of young Iranian volunteers who supported the IRGC during the war with 'human wave tactics.' In the Persian language, *Basij* means 'popular mobilization' for the defense of the Islamic Regime and its achievements. Ayatollah Khomeini's original thinking of the *Basij* was 'an army of 20 million Iranians,' who would be mentally, physically, and spiritually ready all the time for the defense of the revolution and its values.[359] After the war, the *Basij* predominantly remained as an internal morality force that oversaw the implementation of Islamist revolutionary values in the social and cultural realm. Their offices at the mosques, schools and universities facilitate their penetration into the society and perform this duty. Like the IRGC, the *Basiji* played a critical role in suppressing the reformist movement in 2009 as the guards of the revolution. Nevertheless, the main importance of the Basij for the purposes of this thesis is that they are model of 'popular mobilization,' this mobilizational capacity is accompanied by their allegiance to revolutionary Islamism and Shiism. Both the IRGC and the *Basij* are the institutional outcomes of the Holy Defense War. Both have become more institutionalized and empowered over time as ideological security forces of the Islamic Republic. Both have institutionalized an Iranian security culture that features 'popular mobilization,' defensive *jihad*, martyrdom, sacrifice, and the discourse of 'resistance.' This model of security culture would become central to the Islamic Republic's foreign policy discourse over time, specifically after 2003.

3.4.2. The Export of the Revolution

While the 'holy defense war' was the first external experience of the Islamic Republic, its 'export of the revolution' policy was the second. The 'export of the revolution' concept is not easy to define and the policy generated internal discussions regarding the content, extent, and the objectives of the policy. Before defining the policy, one should describe the context within which the policy came into formation. As discussed in previous sections, the Iranian revolution is a multifaceted revolution. It was a response to the domestic socio-political grievances generated by the modernization, nation-state system, and the Western intervention into the Middle East under the mandate

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[359] Ali Alfoneh, 'The Basij Resistance Force,' *Iran Primer*, accessed May 18, 2018, http://iranprimer.usip.org/resource/basij-resistance-force.

system after World War I. The increasing dependence of Middle Eastern rulers on foreign powers for the reconstruction of the military and economic system, the foreign control over the region's natural resources such as oil, and the repercussions of modernization on the social structure and cultural policies had created sufficient ground for the rise of anti-imperialist and anti-Westernist sentiments among the Middle Eastern populations. The empirical implications of this region-wide restlessness in Iran were Shah's modernization policies, the increasing British control over Iranian oil, and the foreign designed coup against Mosaddeq. Therefore, the revolution was an anti-imperialistic and anti-American revolution. Given the fact that such problems were shared by most third-world countries, the revolutionary cadres had a systemic approach to these problems. As such, the revolutionary regime was anti-systemic and it aimed to refuse conformism to the existing international order with its new mode of existence and ideology.

Secondly, amid a plethora of ideological and intellectual currents, the revolutionary regime had generated an amalgamation all with a dominance of one as a solution to anti-imperialism: revolutionary Islamism. It was neither Marxism nor liberalism, but Islamism, proposed as a third way to cope with the problems experienced by the Middle Eastern nations. According to Interviewee 1, who is an Iranian researcher on Islamism, the clerical logic was that the USA is going to remove all alternative civilizations with an attempt to prevent any alternative views challenging the existing international order.[360] He argues that this proved to be the case in the post-Cold War period, where Russia and China had already accepted the American-led international order after the fall of the Soviet Union.[361] The Interviewee 1 emphasized the Iranian position that the Islamic Republic emerged as one opponent to the American-led international order in a philosophical, cultural and ideological sense.[362] Imam Khomeini's Islamism was an ideology of resistance to the existing international order and he had a universalistic understanding of it. Influenced by the Marxist idea of a 'universal revolution,' he thought that the Iranian Revolution would be the first step towards a worldwide Islamic Revolution. He had a grand vision of a new moral transnational

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[360] Interviewee 1, a researcher speciliazed on Islamic political thought and the intellectual history of the Islamic Revolution at the Center for Islamic Research, in Tehran, Iran. Interview 1 with the author, conducted on August 22, 2015 at Shahid Behesthi University, Tehran, Iran.

[361] Ibid.

[362] Ibid.

political order that would tear down territorial borders and unite the Islamic *Ummah*. It would be materialized by mobilizing the *mustazafun,* i.e. the 'oppressed' peoples of the Muslim community who are artificially separated into nation-states, against the rule by *mostakberoun,* i.e. the 'oppressors' and corrupt regimes.[363]

Despite the existence of similar Islamist movements elsewhere, the Islamic Revolution was different from other movements in one sense: While the Islamic and Shia revivalist movements across the region were movements only, the Islamic Republic was an Islamic state building project. With the revolution, the Islamist revolutionary movement had acquired a great institutional and mobilizational capacity. Iran was now an Islamic government, which would render it institutionally more powerful than any other Islamist movement in the region. This governmental character quickly pushed Iran to adopt a somewhat grandiose attitude concerning the leadership of the transnational Shia movements. As the next section will discuss in more detail, Iran's renewed self-positioning after the Islamic Revolution was one of 'leadership' of the Islamic *Ummah*. As a successful revolutionary movement which culminated into an Islamic government, the Islamic Republic saw the necessary experience, capacity, and power to be an inspirational model and leader to all similar independence movements. The Islamic state-building process, especially in the security sector with the formation of an ideological army like IRGC, also perpetuated this self-identification.

Against this background, how can we define the 'export of the revolution' policy? According to Sinkaya, the 'export of the revolution' is associated with the radical revolutionaries' rejection of the existing international system and Iran's self-promotion as 'a model to be imitated by the oppressed part of the world, especially by other Islamic countries.'[364] However, if model-setting is one, provision of necessary support to liberation movements is another aspect of the export of revolution.[365] Moreover, he argues that there is a 'messianic' feel to the export of the revolution as well, where the revolutionaries engage in 'a quest for just world order and in an Islamic universalism that

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[363] Ibid.

[364] Sinkaya, 'The Revolutionary Guards and the Iranian Politics,' p. 145.

[365] Ibid.

seeks to revive the *Ummah*' until the return of Imam Mahdi from *gayb*.[366] In a similar vein, Ostovar defines the export of the revolution as a policy of radical internationalism, which includes 'taking the revolution's politics and ideological values to other oppressed polities—especially in the developing world—and helping like-minded liberation and Islamic movements' for contributing to their self-determination projects.[367] The policy is a self-assigned duty of the Islamic Republic and is also inscribed in the Article 154 of Islamic Republic's Constitution, which explicitly states the Iranian support for the 'oppressed' peoples against the 'oppressors' in other parts of the world is a duty.[368]

How was the policy of the 'export of the revolution' administered? The Islamic Republic's export of the revolution policy rested on establishing sub-state level relations, instead of state-level relations. The revolutionary regime addressed relevant domestic factions, movements, and groups in other countries for revolutionary mobilization against their respective regimes. While the regime placed no emphasis on the Sunni-Shia divide in export of the revolution on the discursive level and indeed adopted a universalistic approach aimed at uniting the Islamic *Ummah* at large, the policy concentrated predominantly on Shia populations in practice. Pragmatism might have played a role in overreliance on Shias for a number of reasons. First, common Shia identity and Shia narratives might facilitate an Islamist Shia mobilization among the Shias. Second, as discussed in previous sections and emphasized by one of the interviewees, Shias are the socio-politically marginalized stakeholders of the nation-state building processes in the Middle East region. Their access to governmental and bureaucratic positions and thus economic resources has been a source of contention in Iraq, Lebanon, and the Gulf. The marginalization of the Shias, from a pragmatist stance, might have created the background to step in and support the political empowerment of fellow Shias. It should also be emphasized that some of the countries with sizeable Shia populations are internally conflict-torn countries such as Lebanon, which facilitates intervention by foreign actors. Finally, the clerical regime in Iran already had pre-existing clerical ties to their Shia counterparts in other countries before the revolution. The transnational Shia clerical and political networks facilitated Iranian access to their sub-state clients.

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[366] Ibid.

[367] Afshon Ostovar, 'Sectarian Dilemmas in Iranian Foreign Policy: When Strategy and Identity Politics Collide,' *Carnegie Endowment for International Peace*, 2016, p. 12.

[368] See 'The Constitution of the Islamic Republic,' http://www.wipo.int/edocs/lexdocs/laws/en/ir/ir001en.pdf.

The export of the revolution was administered by the collective effort of a variety of actors inside and outside of Iran including clerical and revolutionary personalities and individuals, the IRGC and their affiliated unit Qods Forces and the Office of the Liberation Movements, as well as the clerical networks. The export of the revolution should thus be understood as a network activity of key clerical and military individuals, already existing Shia political nodes across the region, and of unconventional security forces. Two significant personalities who contributed to the revolutionary foreign policy were Mostafa Chamran and Mohammad Montazeri. Mostafa Chamran's transnational activism dates to late 1970s, where he became interested in Islamist and revolutionary movements in the Middle East and actively engaged in the training of guerilla forces in Algeria, Egypt, and Lebanon.[369] He simultaneously initiated the Iran Freedom Movement abroad, which aimed to depose the Shah through armed struggle.[370] A training base was formed in Egypt, where Iranian youth were recruited by the work of Ayatollah Mahmoud Taleqani and Mahdi Bazargan in Iran and sent to Egypt to be trained on irregular warfare tactics, explosives, and weapons as well exemplary revolutionary wars of Cuba, Vietnam, Algeria.[371] This training base was later moved to Lebanon due to the Arab-nationalist political environment in Egypt. He contributed to the mobilization of Lebanese Shias by Musa al-Sadr, a clerical figure of Iranian origin and cousin of Baqir al-Sadr in Iraq, which would culminate in the AMAL movement in Lebanon.[372] Nevertheless, he was called back by Bani Sadr after the revolution and appointed as the defense minister of the Islamic Republic.[373] For a short period of time, he coordinated with Musa al-Sadr for the AMAL movement from Iran. However, his second duty started with the war with Iraq, where Chamran mobilized his own small number of paramilitary fighters, which would later form the IRGC, and was killed during the war.

Gradually, the IRGC became the primary contractor of the export of the revolution policy. Individuals with strong internationalist revolutionary tendencies have had an

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[369] 'Lebanon to Honor Iran Martyred Commander Mostafa Chamran,' *Iran Daily,* August 10, 2015, http://www.iran-daily.com/News/124255.html.

[370] Ali Alfoneh, *Iran Unveiled: How the Revolutionary Guards Are Turning Iran's Theocracy into Military Dictatorship* (Washington DC: Rowman and Littlefield Publishing, 2013), p. 206.

[371] Ibid., p. 208.

[372] Interview 1 with Interviewee 1.

[373] Ibid.

impact on the institutionalization of this policy. One such key personality was Mohammad Montazeri, the son of the Grand Ayatollah Montazeri, who pressed his influence in the IRGC by using his clerical position and opened a separate institutional body for the export of the revolution. This new institution was called the Office of the Liberation Movements and it was established to support the Iranian activities of supporting Islamist liberation movements in the Middle East.[374] Montazeri was an ardent supporter of the transnationalization of the revolutionary movement. Ahmad Khomeini's accounts cited by Alfoneh indicate that Montazeri saw transnationalization as a way to ensure Iran's complete self-reliance against Western domination and he even suggested Khomeini and his son to go to other countries for supporting the revolutionary movements there.[375] A special unit was formed under IRGC tasked with carrying out the military activities of exporting the revolution, the IRGC - Qods Force units. The Qods Force was originally planned to be the army of the Islamic countries and their combatants for emancipating the oppressed peoples of the Muslim *Ummah* from the reign of oppressor regimes. A bank account was also opened at Bank Melli to collect funding for the operation of the Office and the Qods Force.[376] In short, key personalities who were already active members of Islamist movements elsewhere in the Middle East and their pre-existing networks-type relationships culminated in the institutionalization of this effort under Qods Forces. After the revolution, the key Iranian figures of transnational Shia networks attained key positions within the regime, i.e. Ayatollah Khomeini becoming the Supreme Leader, Chamran defense minister, and Montazeri as one of the founding fathers of the IRGC and Qods Forces along with Chamran. The Office of the Liberation Movement's early activities focused on Lebanon, Syria, Gulf countries, and to a small extent Afghanistan.

Between 1980 and 1988, we see the intensification of the Office and Qods Force activities along two main lines: 1) The existing network ties to Lebanon created a strategic reason to mobilize the revolutionary movement in Lebanon, 2) The war with Iraq created another strategic environment for the concentration of their activities in Iraq. Lebanon is a key zone in the Middle East for the mobilization of a Shia revival. Lebanon was a

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[374] Louer, *Transnational Shia Politics*, p. 179.

[375] Alfoneh, *Iran Unveiled*, p. 212.

[376] Ibid., p. 113.

country that fell into political struggle along religious and sectarian lines. The Shia politicization there was a response to unequal political representation and economic inequalities. As a matter of fact, a famous member of the clerical Sadr family in Iraq and a well-known cleric who was first raised in Qom and then joined Najaf *hawza* - Baqir al-Sadr's cousin Musa al-Sadr - had already flown to Lebanon in late 1950s. He contributed to the establishment of The Movement of the Deprived, the armed wing of which is known as the AMAL movement in 1974, and he became one of the most charismatic clerical figures across the Middle East.[377] Musa al-Sadr's focus was on the disadvantaged living conditions of the Shias, despite their sizeable population in Lebanon. He adopted the terminology of 'deprivation' and 'disinheritance' against Marxian 'class conflict' in his campaign and tapped into Shia identity to revive a sectarian consciousness among the Lebanese Shias.[378] Mostafa Chamran joined Musa al-Sadr's efforts in mobilizing the Lebanese Shias in 1970s. He transformed the Jabal al-Amel Technical School in South Lebanon into a recruitment as well as an ideological and military training center for the Shia, and established The Movement of the Deprived along with Musa al-Sadr as well as the Supreme Shia Islamic Council of Lebanon, which aimed at uniting the Shia factions.[379]

The Shia revival that flourished in Lebanon under Musa al-Sadr and Chamran cooperation was later joined by another Islamist revolutionary discourse within the context of Arab-Israeli conflict – anti-Zionism. Israel constitutes an important theme in Iran's foreign policy discourse for a number of reasons. First, as the primary American ally in the region, Iran sees Israel as the regional extension of American intervention in the region and this perpetuates the former's anti-imperialistic attitude. Second, as Iranian journalist Mostafa Dehghan emphasized in an interview with the author, the revolutionary regime saw an opportunity in taking a definitive stance on the prolonged Arab-Israeli conflict in the region. Dehghan defines the Arab-Israeli conflict as a 'common issue' for the whole region, to which many other regional issues are tied.[380] At a time when Egypt

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[377] See Fouad Ajami, *The Vanished Imam: Musa al-Sadr and the Shia of Lebanon* (Ithaca: Cornell University Press, 1986).

[378] Ibid., p. 136-137.

[379] Alfoneh, *Iran Unveiled*, p. 209.

[380] Mostafa Dehghan, journalist at ANA News Agency of Iran. Interview with the author, conducted on September 5, 2015 at ANA News Agency, Tehran, Iran.

was gradually shifting away from the anti-Israeli camp in the Middle East towards the pro-Western camp with Camp David Accords and when other regional players were exhibiting an ambivalent position on the issue at best, the Islamic Republic took a solid anti-Israeli position and pressed its force as well as legitimacy in the region.[381] The Islamic Republic's anti-Zionist tone earnt the regime a great opportunity to intensify its support to Lebanese Shias when Israel invaded South Lebanon in 1982 due to PLO activities in Lebanon.

Musa al-Sadr had vanished during his trip to Libya and the secular AMAL movement was fighting against Palestinian groups in South Lebanon for afflicting damage to Shia populations.[382] Nevertheless, there was a group of AMAL fighters who were influenced by the Iranian Revolution, drifted away from AMAL, and engaged in a military resistance movement against Israeli forces in Lebanon.[383] Iran started providing arms, military and ideological training to these resistant Shiites in Lebanon by sending 1500 IRGC officials to Bekaa Valley.[384] This group trained and funded by Iran came to be known as the famous Shiite militia, and later political party, Hezbollah – The Party of God. By 1985, Hezbollah had repulsed Israel from the Lebanese territory by using IRGC-trained tactics on the field such as guerilla warfare. Hezbollah's victory against Israel earnt the group domestic fame. But in contrast to AMAL, Hezbollah had an openly Islamist revolutionary vision greatly influenced by Ayatollah Khomeini's thoughts. Hezbollah disclosed the group's political vision and ideological contours in what came to be known as '1985 Manifesto.' In the Manifesto, Hezbollah paid allegiance to the Islamic Republic and Ayatollah Khomeini by saying 'We obey the orders of one leader, wise and just, that of our tutor and *faqih* (jurist) who fulfills all the necessary conditions: Ruhollah Khomeini.'[385] They adopted Khomeini's 'oppressor' and 'oppressed' language in defining the political and military program of the militia formation.[386] Accordingly,

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[381] Ibid.

[382] Augustus Richard Norton, 'The Role of Hezbollah in Lebanese Domestic Politics,' *The International Spectator* 42, no. 4 (2007): p. 476.

[383] Ibid.

[384] Emile Hokayem, 'Iran and Lebanon,' *The Iran Primer*, 2010, http://iranprimer.usip.org/resource/iran-and-lebanon.

[385] See 'An Open Letter: The Hezbollah Program,' *Web Archive*, published first in 1985 in Arabic and then in the English language in 1988, accessed 27 May, 2017, https://web.archive.org/web/20060821215729/http://www.ict.org.il/Articles/Hiz_letter.htm.

[386] Ibid.

carrying out an anti-imperialist policy against the 'colonialist' American and French influence over Lebanon; destroying the 'Zionist regime' in Israel; and establishing an Islamic government in Lebanon were the three policy objectives of Hezbollah in 1985.[387] It was apparent that from the very beginning, Hezbollah was a resistance movement against imperialism, Western influence, and Zionism in Lebanon and in the broader region, which put an Khomeini style Islamic government at the center of its struggle.

Hezbollah strengthened its social fame in Lebanon after the war with Israel was over, where, very much like IRGC after the Holy War, engaged in social welfare activities. In this respect, a Hezbollahi charity network called 'assistance council of the Imam Khomeini' was organized and run by the spiritual leader of the party, Ayatollah Fadlallah for the provision of economic and social assistance to Hezbollah martyrs' families.[388] The institution's activities were designed to increase Iranian-Hezbollahi transnational cooperation in the social field.[389] In a similar vein, the Iranian-Hezbollahi cooperation also included the opening of hospitals and medical centers in Beqaa and Beirut with privileged treatment services to the Shias.[390] Other activities included opening Islamic seminaries, particularly aimed to provide Islamic and ideological training to Shia populations for increasing the organization's recruitment among Shias.[391] The Iranian-Hezbollahi cooperation continued and their ties even flourished under such military and social activities during 1990s and 2000s. Even though Hezbollah gradually dropped its anti-systemic stance domestically with 2009 Manifesto and became a legitimate political party engaged in Lebanese electoral politics, ties to the Islamic Republic never vanished. As a matter of fact, despite Hezbollah's move away from establishing an Islamist government in Lebanon, the Iranian regime always saw Hezbollah as a successful case of Iran's export of the revolutionary ideology – of its anti-imperialism, anti-Zionism, and Islamism.

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[387] Ibid.

[388] E. Azani, *Hezbollah: The Story of the Party of God: From Revolution to Institutionalization* (New York: Palgrave Macmillan, 2009), p. 72.

[389] Ibid.

[390] Ibid.

[391] Ibid.

Besides Lebanon, Iranian efforts at exporting the revolution also focused on Iraq during the war. Former Dawa Party cadres and the Shiraziyyin network gained the Iranian support against the Saddam regime during this period. As discussed in the previous section, when the Dawa Party was almost dissolved by Saddam's regime, another Shia Islamist political party emerged under the name Supreme Council for the Islamic Revolution in Iraq (SCIRI). SCIRI was formed by the ex-Dawa members and Islamic Action Organization in 1982, part of whom were in exile in Tehran due to the war with Iraq. The Iranian regime provided significant support to SCIRI as a bulwark against the Saddam regime. SCIRI and its clerical leader Baqir al-Hakim adopted Khomeini's understanding of *velayet-e faqih* and sought to establish an Islamic theocracy in Iraq. Their support by Iran and embrace of an Iranian style theocracy against the Arab-nationalist Baath regime in Iraq provided Iran with an ally in Iraq. SCIRI posed as a resistance and protest force against the Iraqi regime in lieu of Dawa Party during the war. Another potential area for Iran's export of the revolution was the Gulf countries with significant Shia populations in Kuwait, Bahrain, Saudi Arabia, and Yemen. While a majority of these Shia groups in the Gulf countries were of Sevener Shiism, another sect of Shia which bears theological differences to Twelver Shiism, Iran could influence the Shiites there mostly thanks to the works of al-Shiraziyyin family in these countries. In this respect, the Shiraziyyin family adopted an anti-Bahraini and anti-Saudi program carried out from Iran with an attempt to politically empower the Shias in these countries.[392] The Islamic Front for the Liberation of Bahrain was such a Shiraziyyin-supported movement with IRGC providing the necessary military, technical assistance.[393] Iranian and al-Shiraziyyin activities provoked Shiite revolts against the Sunni-dominated central authority, which embittered Iran's relations with Gulf regimes.

The Iranian attempts to export the revolution during the 1980-88 period brought along material, political, and military costs with it. One adverse consequence was the prolongation of Iran-Iraq War, which is attributed to the ideological fervor of IRGC in continuing with the conflict. Secondly, the IRGC and Qods Forces activities, along with the eight year-long war, generated great economic distress for the regime. Finally, the policy of exporting the revolution was simply unsuccessful in materializing Khomeini-

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[392] Louer, *Transnational Shia Politics*, p. 181.

[393] Ibid.

style Islamist governments across the Middle East. The Shia sectarian identity and the Shia networks that Iranian clerics were a part of even before the revolution gave Iran a leverage to export the revolutionary ideology and strategy to different Shia political groups. However, serious theological and political differences among these Shia actors emerging in multiple national settings hindered the export of the revolution itself. As discussed previously, Ayatollah Khomeini, the Dawa Party and al-Shiraziyyin family of Karbala displayed significant theological differences on a Khomeini-style government based on *velayet-e faqih.* While they politically and ideologically shared the notion of politically activist Shiism and Shia revival, they could not agree on the type of the political system to be deployed in their national settings. The Iranian regime thus lost hope of exporting the revolution by the end of 1988 and gradually dropped the export of the revolution policy starting from 1990s. The accrued costs shifted the Islamic Republic's attention especially in the aftermath of the Holy War towards reconstructing the country and solving its economic and political problems.

Although the Iranian attempts to export the revolution did not materialize in revolutionary moments across the Middle East, the policy proved to have significant long-term implications for Iran's foreign policy in the Middle East. Accordingly, the export of the revolution earnt Iran powerful non-state allies in the region. The Islamic Republic's alliances with various Shia and Islamist groups made occasional come-backs during 1990s and 2000s. In this respect, what started as a policy of exporting the revolution in Lebanon gradually evolved into what they called an alliance of 'resistance.' The 1990s and early 2000s witnessed the strengthening of a 'resistance block' against Israel and the American policies in the Middle East and this block the Lebanese Hezbollah, Syria, Hamas, and Iran. During 1990s, Iran provided significant support to Hamas, which included an alleged $30 million funding annually, training of Hamas cadres at IRGC camps in Iran and Lebanon, and opening of a Hamas Office in Tehran.[394] Hamas thus became a significant non-Shia ally to Iran. Iran continued with its strong ties to Hezbollah also. When Hezbollah entered war with Israel in 2006, Iran cooperated with Syria in transporting sophisticated weaponry and support to Hezbollah. Finally, the relevance of Iranian ties to the Shias established with the export of the revolution policy was resurfaced

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[394] Rachel Brandenburg, 'Iran and the Palestinians.' *Iran Primer*, accessed April 14, 2016, http://iranprimer.usip.org/resource/iran-and-palestinians.

after the fall of the Saddam regime in Iraq in 2003. From 2004 onwards, Iran started establishing closer relations with the Shia political parties and groups such as al-Dawa and SCIRI, which were suppressed by the Baath regime in previous decades. By 2010, a strong alliance under the leadership of Iran was visible between Lebanese Hezbollah, Syria, Iraqi Shia groups, and Iran. This alliance was an emerging 'Shiite Crescent' for some, as it finally denoted an ever-rising Shia empowerment across the region. On the other hand, the IRGC preferred to supplement the anti-imperialist and anti-Zionist content of their 'resistance front' discourse with growing sectarianism in the region after 2011 and merged 'the resistance front' and 'Shia empowerment' under 'axis of resistance.'

3.4.3. 'Islamism' in Iran's Foreign Policy

The Islamic Republic's foreign policy during the revolutionary period is an ideological foreign policy. The identity, ideology, and the grand vision of the early Islamic Republic led to an Islamist foreign policy during the first decade. As such, Iran's foreign policy during the first decade neatly confirms the Hypothesis III of this study, which stated that Iran's Islamist revolutionary ideology leads to an ideological and religious policy in the Middle East. To expand the explanatory power of Hypothesis III, this section will continue with Dehghani-Firouzabadi's discussion on 'Islamism' as the overarching foreign policy discourse of the Islamic Republic since 1981.[395]

In relation to the role of religion in Iran's foreign policy, Dehghani-Firouzabadi argues that 'Islamism' has been Iran's dominant foreign policy discourse since the end of Abolhasan Bani Sadr's government in 1981. The first two-years of the revolution and the subsequent 8 years of the first decade reflect the tensions between the nationalist and revolutionary Islamist aspects of Iran's identity. Despite Ayatollah Khomeini's leadership of the revolution and election as *vali-e faqih* of the Islamic Republic, the regime was still

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[395] This section relies extensively on Sayyed Jalal Dehghani-Firouzabadi's theory of Islamism as the Islamic Republic's overarching foreign policy discourse for a particular reason. Dehghani-Firouzabadi is an Iranian scholar who studies Iran's foreign policy from the Islamic Republic's social sciences perspective. His comprehensive volume on Iran's foreign policy is a reference book intended for the internal consumption of a Persian-speaking audience, the training of political scientists at major universities in Iran, and contributtes to the internal scholarly discussions on Iran's foreign policy in the Islamic Republic. The choice of Dehghani-Firouzabadi's work for this section is thus intentional; it neatly reflects the Islamic Republic's scholarly orientation on the issue of religion in Iran's foreign policy, thus contributing to the general argument of this thesis.

struggling with internal opposition from the secularists and Marxists. During this internal struggle, Abolhasan Bani Sadr became the first president of the Islamic Republic. During his two-year-long presidency, his foreign policy vision reflected what Dehghani-Firouzabadi defined as a 'liberal-nationalist' foreign policy. During the first two years of the revolution, Bani Sadr government reasoned that the Islamic Revolution should be received as a national revolution and not as a transnational revolution committed to spreading the revolutionary Islamism spirit transnationally.[396]

The Islamic Republic was identified as a traditional nation-state operating in conformity to the existing Westphalian order externally and entertaining 'religious-nationalism' internally.[397] Iran was a self-standing, autonomous, territorial nation-state abiding by Westphalian norms, institutions, principles, and power balances intrinsic to this system.[398] The new revolutionary regime did not entertain the idea of revising and/or reversing the existing international system, as the foreign policy priorities lied in the protection of nation-state's interests.[399] The regime's foreign policy understanding was quite secular and the export of the revolutionary ideology was not a foreign policy objective. Islam's role was limited to Iran's territorial borders.[400] In that respect, Persian nationalism was predominant over revolutionary Islamism as a state ideology. As the nation-state's interests have a priority over the *Ummah*'s interests, the foreign policy objectives do not include the support for revolutionary Islamist movements within the Islamic *Ummah*.[401] As such, Dehghani-Firouzabadi defines Iran's 'liberal nationalist' foreign policy discourse during Bani-Sadr government as 'realist,' with revolutionary idealism being restricted to domestic affairs and not dominating the foreign policy reasoning of the time.[402] Securing the Iranian nation-state was a priority over representing the interests of the Islamic political movement from which it emerged.

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[396] Dehghani-Firouzabadi, *Siyaset-e Khareji-e Jumhuri-e Eslami-e Iran,* p. 197-205.

[397] Ibid.

[398] Ibid.

[399] Ibid.

[400] Ibid., p. 204.

[401] Ibid.

[402] Ibid., p. 193.

With the termination of Bani-Sadr's government by clerical power nodes in 1981 and the real consolidation of power by the Islamists within the regime, 'Islamism' replaced 'liberal-nationalism' as the dominant foreign policy discourse for the decades to come. This also meant the unseating of a 'realist' and secularist foreign policy by an ideological one. The Islamist revolutionary identity of the new regime took precedence over Persian nationalism. Revolutionary Islamism was taken out of its domestic sphere, gradually determining the Islamic Republic's self-identified roles, duties, interests, and objectives in external affairs. The Islamic *Ummah*'s interests earnt as much relevance and priority as the nation-state's interests and religious political ideology became the central determinant of Islamic Republic's foreign policy.

State Identity. According to the arch-discourse of 'Islamism' in Iran's foreign policy culture, the nature, functions, and identity of the Islamic Republic are defined as Islamic.[403] The Islamic Revolution of 1979 and Shia Islam are the two main components of state identity.[404] Islamism posits that the Islamic Revolution is not only a national revolution but also a transnational revolution.[405] The existing international system, along with its structure, power relations, and institutions are neither religious nor Islamic, and is unjust and discriminative according to this discourse.[406] The Islamic Republic originally saw its revolution as the first instance of resistance and revolt against this 'unjust' and 'discriminative' system, which was expected to be a source of inspiration for other nations and to be followed by similar revolutions elsewhere. Being the first instance of an Islamist movement that culminated into a revolutionary regime with an Islamist identity has delineated certain foreign policy principles and assigned 'transnational roles' for the new regime.[407]

Principles. The general principles of the Islamic Republic lie in the original premise that the revolution is not a national but a transnational one. Accordingly, the protection of the *mostezefan*, i.e. the 'oppressed' peoples of the world in Khomeini's terminology and support for independence movements are constitutionally defined as two

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[403] Ibid., p. 191.

[404] Ibid.

[405] Ibid.

[406] Ibid.

[407] Ibid., p. 90.

principles of the Islamic Republic.[408] The Article 152 of the Islamic Republic's constitution points out to the principles of fight against the international system of 'domination,' and support for all Muslims, which states 'The foreign policy of the Islamic Republic of Iran is based on the rejection of any kind of domination, both its exercise and submission to it; the preservation of the all-inclusive independence of the country and its territorial integrity; the defense of the rights of all Muslims; non-alignment in relation to the domineering powers.'[409] Article 154 of the Constitution lays out the Islamic Republic's policy of the support for the independence movements, where it says 'While [the Islamic Republic] completely abstains from any kind of intervention in the internal affairs of other nations, it supports the struggles of the oppressed for their rights against the oppressors anywhere in the world.'[410]

Transnational roles. In line with its revolutionary Islamist identity and principles, the state's self-assigned transnational roles include protecting Islam, the Islamic community, and the Shias; fighting against imperialism and *estekbar,* i.e. 'the global arrogance,' which refers to the US 'imperialism' and 'hegemony' in Khomeini's terminology; fighting against 'Zionism;' protecting the Islamic Revolution, its political system, and political ideals; supporting 'emancipation' and independence movements; protecting the *mostezefan*; being an 'exemplary state' and a 'model' inspiring other in the Islamic world; being the leader and the center of the Islamic world, as well as a 'revisionist' state.[411]

Transnational interests. According to Dehghani-Firouzabadi, the above-defined 'transnational roles' determines 'transnational interests' in foreign policy, which he treats as one of the pillars that comprises the national interest. The concept of 'transnational interests' is a novelty in this respect and reflects the very dual nature of the Islamic Republic as a traditional Westphalian nation-state with self-assigned trans-national and anti-systemic aspirations. In parallel to our classical understanding of national interests in IR theory, the physical survival of the state, including the survival of the nation-state,

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[408] Ibid., p. 133.

[409] See 'The Constitution of the Islamic Republic,' http://www.wipo.int/edocs/lexdocs/laws/en/ir/ir001en.pdf.

[410] Ibid.

[411] Dehghani-Firouzabadi, *Siyaset-e Khareji-e Jumhuri-e Eslami-e Iran,* p. 90.

national unity, and the territorial borders greatly matter for the Islamic Republic and is one pillar of its national interests.[412] In addition to that, the Islamic Republic has 'transnational interests,' which are Islamically and ideologically-defined. The transnational interests reflect the anti-systemic and revisionist tendencies of the Islamic Republic as a revolutionary state. The ideals of 'emancipation' and 'independence' are two main themes accompanying transnational interests in this respect. The transnational interests include the survival of the Islamic revolution at home, 'the export of the revolution' abroad, establishing an international Islamic society, ensuring the unity of the Islamic *Ummah*, revising or changing the existing international and regional system, i.e. 'the hegemonic American order' at the international level and the 'Israeli-based' order at the regional level.[413]

Objectives. Finally, the duality of the national interests are further reflected on the nature of foreign policy objectives. Dehghani-Firouzabadi's description of national security objectives are parallel to our classical understanding and includes territorial integrity, national sovereignty, the survival of the Islamic Republic's order, the protection of the Iranian nation, and economic development.[414] On the other hand, transnational objectives are again Islamically and ideologically defined, where protection of Islam at home and abroad, the export of the revolution, and the unity of the Islamic *Ummah* emerge as three pillars of the Islamic Republic's transnational foreign policy objectives. The Islamic Republic is committed to the protection and survival of the revolutionary political order inside the Islamic Republic. The Article 150 of the Islamic Republic's Constitution assigns the duty of protecting the revolution to the Islamic Revolutionary Guard Corps, which says 'The Islamic Revolutionary Corps, established in the early days of the victory of the Revolution, will remain in effect in order to continue in its role of protecting the Revolution and its achievements.'[415] At the regional and international level, Iran self-assigned the objective of protecting and supporting Muslim communities, where

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[412] Ibid, p. 143.

[413] Ibid., p. 143-144.

[414] Ibid., p. 149-152.

[415] See Article 150 of the Islamic Republic of Iran's Constitution, http://www.wipo.int/edocs/lexdocs/laws/en/ir/ir001en.pdf.

the Lebanese and Iraqi Shiites, and Bosnian Muslims are the concrete policy outcomes thereof.[416]

The Islamic Republic's transnational foreign policy objective of 'exporting the revolution' is related to the original revolutionary ideological premise that the Islamic Revolution is a transnational revolution and the Islamic Republic's revolutionary ideals should be spread elsewhere.[417] As the only successful case of Islamic revolutionary movement, Iran sees itself as the center of the world of Islam and self-assigns the role of spreading these revolutionary ideals.[418] Three strategies are adopted in accomplishing this foreign policy objective. First, Iran aims to extend political and spiritual support to independence movements via international organizations and diplomatic channels.[419] Second, the Islamic Republic is portrayed as a 'model' of Islamic modernity, where the themes of Islam, democracy, and development, which are traditionally deemed incompatible according to Western modernist accounts, are embodied in the Islamic Republic.[420] By borrowing from several pre-revolutionary intellectual currents, the Islamic Republic's early cadres aimed to reverse this traditional understanding, to portray the Islamic Revolution in Iran as a model of Islamic modernity in the region, and inspire the Muslim world. Finally, Iran resorts to 'propaganda' to achieve its transnational objectives by spreading the revolutionary ideology via information channels and media.[421] This way, the Islamic Republic aims to generate new intellectual currents that would inspire similar political movements elsewhere in the region.[422]

While Dehghani-Firouzabadi argues that Islamism has been the dominant foreign policy discourse since 1981, he recognizes the fact that the historical and socio-political circumstances created 'intra-discursive shifts,' if not an 'inter-discursive' one between

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[416] Dehghani-Firouzabadi, *Siyaset-e Khareji-e Jumhuri-e Eslami-e Iran,* p. 160.

[417] Ibid., p. 161.

[418] Ibid.

[419] Ibid., p. 163.

[420] Ibid.

[421] Ibid.

[422] Ibid., p. 91.

realism and idealism - or between liberal-nationalism and Islamism.[423] Accordingly, while the Islamic Republic maintained the discursive core of Islamism over decades, the level of urgency and priority associated with the self-assigned transnational duties, interests, objectives as well as the nature of pursued strategies and tools changed in line with historical circumstances. This means that Islamism has not gone without confusions, dilemmas, and divergences of opinion over various aspects of foreign policy as the external and internal circumstances demanded. These confusions rested on a number of questions including how to let Persian nationalist and Islamist identities co-exist, how to accommodate Islamic interests with nation-state's interests, what tools and strategies to be used for achieving transnational ideals and objectives, and how to establish a global Islamic order within an international system that rested on nation-states.[424]

During the attempt to accommodate these paradoxes, certain transnational roles are highlighted and others are muted, certain interests took precedence over others, and certain objectives are highlighted while others are transformed in line with political circumstances with no dismissal of the revolutionary Islamist ideology and Shia identity. To the contrary, the ideology and identity of the regime always remained at the center, whereas the consolidation of the Islamic regime, the gradual institutionalization of foreign policy, and the permissiveness of internal and external circumstances dictated for Iran to what extent to bring ideology forward in foreign policy. Dehghani-Firouzabadi's point is shared by foreign policy experts and academics interviewed during the field research. Interviewees particularly stress the ideological continuation in Iran's foreign policy in this respect, where discourses change only as particular reading of the same ideology. Discussing the pragmatism of Rafsanjani period foreign policy, Abbas Khalaji referred to his policy as 'also religious,' reflecting the contours of 'political Islam,' and 'a particular reading of political Islam' under post-war circumstances.[425] In a similar vein, Interviewee 7 argues that there is an element of 'continuation in Iran's foreign policy, because of the Supreme Leader,' who forces the system to continue from government to government.'[426] He exemplifies Iran's continual support to the Muslim world and the

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[423] Ibid., p. 190-192.

[424] Ibid., p. 207.

[425] Abbas Khalaji, former professor of international relations and Iranian foreign policy at Imam Hossein University. Interview with the author, conducted on August 4, 2016 at Tehran International Exhibition, Tehran, Iran.

[426] Interviewee 7, professor of international relations at Shahid Beheshti University, Tehran, Iran. Interview with the

Palestinian issue as well as its persistent 'fight with the Great Satan and Israel' in this respect.[427] Responding to the periods of rapprochement with and revulsions from aforementioned players, he argues that the ideology is the continual element in foreign policy, where implementation, i.e. 'how to combat with the USA and the international community' changes from cabinet to cabinet.[428] Responding to what determines the extent of Iranian emphasis on ideology in practice, he answers by exemplifying the Iranian stance to the nuclear issue;

> 'The nuclear deal is the last resort to solve the nuclear issue. It we are strong, we defy. Iran is in a very difficult economic situation. We are searching for our ideal conjecture between security and ideology. When we are weak, we are trying to solve our problems. When we have more power, we go back to ideology. It is always like a pendulum.'[429]

The first decade of the Islamic Revolution can be defined as the hallmark of 'Islamism' in Iran's foreign policy. Therefore, this period can be treated as a benchmark to understand the shifting influence of ideology and religion in Iran's foreign policy. Nevertheless, Dehghani-Firouzabadi does not treat the revolutionary period's Islamism as monolithic either. Rather, he defines the period between 1981-85 as 'Ideational Pan-Islamism' and the period between 1985-89 as 'Centralist Expediency.' Such a discursive differentiation rests on the fact that the external security conditions necessitated a change in foreign policy priorities and objectives for the Islamic Republic.

One could define the 'Ideational Pan-Islamism' of 1981-85 as a pure ideological Islamist foreign policy, reflecting the Islamist revolutionary fervor and ambitions of a fledgling Islamic Republic. The nature of the Iranian state was defined as Islamic during this period, where the legitimacy of the state relied on religion and Islam.[430] Even though the *vali-e faqih* assumed the leadership in Iran, he is not only the *vali-e faqih* of Iranians but of all Muslims.[431] The state identity is both Islamic and revolutionary. The

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author, conducted on September 13, 2016 at Regional Studies Institute, Shahid Beheshti University, Tehran, Iran.

[427] Ibid.

[428] Ibid.

[429] Ibid.

[430] Dehghani-Firouzabadi, *Siyaset-e Khareji-e Jumhuri-e Eslami-e Iran,* p. 209.

[431] Ibid.

revolutionary Islamist ideology and principles steer the state to a 'role-oriented' foreign policy, where logic of appropriateness trumps the logic of rational interests.[432] The transnational aspect of the revolutionary ideology render the Islamic Republic different from other states, where the former has 'commitments' above that of a territorial nation-state.[433]

In 'Ideational Pan-Islamism,' the Islamic Revolution is defined as a transnational revolution and the Iranian Revolution is first pillar of this transnational movement. Therefore, there is a heavy emphasis on Iran's self-assigned roles of being 'a revolutionary and revisionist state,' fighting against imperialism, *estekbar*, and Zionism, protecting and supporting the 'oppressed,' being the leader of the world of Islam, and being the 'patron' of similar Islamist independence movements elsewhere.[434] In line with these self-assigned roles, the Islamic interests such as the protection of, support for, and the empowerment of the Muslims have a priority over the nation-state's interests.[435] The foreign policy objectives are quite revisionist and revolutionary. The spread of the Islamic values and revolutionary ideals to the third world and establishing a single Islamic *Ummah* constitutes the first pillar of foreign policy.[436] This is accompanied by a total dismissal of the existing international system as unjust and dysfunctional. The ultimate objective is thus to change the existing international system, for which revolutionary strategy is deemed necessary.[437] In short, the Islamic Republic's foreign policy objective during 1981 and 1985 can be defined as uniting the Muslims by the spread of Islamist revolutionary values, ideas, and norms elsewhere. The unification of the Islamic *Ummah* has priority over securing the nation-state interests of the new Republic. This revolutionary and revisionist outlook was embodied in the export of the revolution policy of the Islamic Republic during this period.

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[432] Ibid., p. 208.

[433] Ibid., p. 210.

[434] Ibid., p. 211.

[435] Ibid.

[436] Ibid., p. 213.

[437] Ibid.

Nevertheless, the prolonged war with Iraq and the ensuing security threats to the new regime would shortly curb the new regime's strong transnationalist logic with a survival logic. In this respect, the Islamic Republic's foreign policy elites gradually shifted their priority away from the unification of the Islamic *Ummah* to protecting the Iranian nation-state. The foreign policy priority lied in the protection of Iran's territorial unity against all costs during the Holy War.[438] This did not mean that Islamic Republic move away from its self-assigned transnational duty and foreign policy objective of unifying the *Ummah* via revolution. To the contrary, the Islamic Republic's discourse between 1985-89 put the Islamic Republic at the 'center' of the world of Islam as the only revolutionary Islamist state on earth.[439] According to the discourse of 'Centralist Expediency,' the Islamic Republic was chosen to 'lead' the *Ummah* and serve the greater *Ummah*'s interests.[440] As the 'center' and 'leader' of the Islamic world, Iran's security and survival should be given priority.[441] It should be noted that the transnational duties and objectives of the Islamic Republic are maintained under the 'centralist' discourse. What changed is the foreign policy 'priority' under war circumstances. The foreign policy elites of the time agreed on the proposition that the Islamic state should be fully established and stabilized first in Iran as the 'center' and 'leader' of the Islamic *Ummah* and then in the rest of the world.[442]

Contrary to other scholars' description of Iranian ideationalism as fading under Rafsanjani and Khatami's presidencies, Dehghani-Firouzabadi identifies the foreign policy under Rafsanjani's presidency as renewed forms of Islamisms under both presidencies. Accordingly, he calls Iran's foreign policy discourses under Rafsanjani as 'realist Islamism' and that of Khatami as a policy of 'peaceful coexistence.' Under 'realist Islamism,' the Islamic Republic's priorities shifted towards the economic reconstruction of the country in the post-Holy War period.[443] The regime did not abandon Islamism during this period, but shifted its priorities to become an example of economically

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[438] Ibid., p. 215.

[439] Ibid.

[440] Ibid., p. 216.

[441] Ibid.

[442] Ibid., p. 217.

[443] Ibid., p. 220.

developed Islamic state in the region.[444] Militarism was gradually dropped during this period, but this did not mean a total refusal of the Islamic Republic's self-ascribed roles as the protector of the *mostezefan*. The regime promised to protect of the *mostezefan* diplomatically by supporting them in international organizations and the Iranian regime chose to combat with the 'global arrogance' again diplomatically by challenging the anti-Iranian policies of the imperialist powers.[445] The export of the revolution was also ripped of its military connotations and it was reduced to mean to be an example of economically developed Islamic state for other nations. Under Khatami's rule, there is another shift in the foreign policy priorities of the Islamic Republic. Khatami's priority was securing the international political legitimacy of the Islamic Republic.[446] His foreign policy objectives included increasing the legitimacy of Iran's Islamist political ideology, consolidating Iran's international reputation, and building trust with the rest of the world.[447] As such, he redefined the identity of the Islamic Republic as a 'religious democracy' and the export of the revolution during this period meant promoting the Islamic Republic as 'a model of religious democracy' in the region.[448] It should be noted that both Rafsanjani and Khatami's periods are labelled as 'pragmatist' and 'rational' by scholars. While this is correct, as Dehghani-Firouzabadi shows, this shift towards pragmatism and rationality never meant a total break-away from Islamism. Rather, both presidents reworked and adapted basic precepts of Islamism according to the time, context, necessities, and priorities. Religion remained as a constant in foreign policy, but its different roles and aspects changed.

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[444] Ibid., p. 222.

[445] Ibid., p. 223.

[446] Ibid., p. 227.

[447] Ibid.

[448] Ibid., p. 228.

3.5. Conclusion

This chapter leaves us with several conclusions on the role of religion in Iran's foreign policy. First, this chapter showed that the Islamic Revolution should be evaluated as part of a greater transnational Shia revival preceding the revolution in 1979. The institutionalization of Shia *ulama*, the Shia *hawzas* and the Shia theological-political currents shaped the ulama's position as an important power center in the Middle East, and the fledgling Islamic Republic's identity and ideology. Against this background, we can argue that, excluding Bani-Sadr government, Iran's foreign policy until 1989 was an ideological foreign policy. The policy heavily bears the imprint of transnational Shia political activism and the intellectual environment of the pre-revolutionary period. The role of religion during that period was threefold: 1) Shia identity characterized the *interaction context* within which the Islamic Republic operated. Transnational Shia networks constituted a good part of this interaction context. 2) Religion served as the *identity* and *ideology* of the new regime. 3) Religious identity and ideology shaped the self-ascribed *roles, duties, transnational interests* and *objectives* of the Islamic Republic. The foreign policy objective included the establishment of an Islamic *Ummah* against Western imperialism in the region. All in all, religion is features as an *identity* and *ideology* during the first decade. As such, this neatly fits the constructivist Hypothesis III of this thesis. The Iran-Iraq War of 1980-88 and the export of the revolution are the two dominant themes defining this period, where the latter can be said to be the hallmark of Iran's religious-ideological foreign policy.

Nevertheless, a more significant role of religion in Iran's foreign policy lies in the experience of the Islamic Republic during the first decade and the ramifications of this experience for the decades to come. It would not be an exaggeration to suggest that both the Holy Defense War and 'the export of the revolution' policy made the Islamic Republic *a la* Charles Tilly. For one thing, the war consolidated the Islamic Republic's religious ideology. The war shaped the foreign policy terminology of the Islamic Republic, i.e. the terminology of how the early revolutionary regime understood 'the international system,' how it defined 'the enemy,' how it defined 'roles' within the system. The Islamic Republic learnt how to frame external conflicts in a revolutionary Islamist terminology. The war mobilized the Iranians around Islamist, anti-imperialist, Shia themes and the heavy

reliance on Karbala narratives for mobilization was one outcome of this process. For another, the Holy War experience shaped the nature of the Islamic Republic's security system and perpetuated its further institutionalization. In this respect, the institutionalization and the further consolidation of Islamic Revolutionary Guard Corps and the *Basijis,* both of which promoted the idea of a security culture based on an Islamist, ideological, volunteer-based, popular mobilization force dominated the organizational model of Iran's security institutions. The IRGC and *Basiji* organizational model came to be portrayed as an Iranian military and security brand by such entities. This organizational model became very powerful within the regime over time. In short, the Holy War made the Islamic Republic.

Concerning 'the export of the revolution,' although the policy failed to manifest Islamic revolutions elsewhere, it left Iran with significant experience on interacting with the Shiites across the region. Contrary to other Shia movements in the region, the Islamic Revolution turned the Shia political movement into 'a governmental form' in Iran, thereby assigning 'a state capacity' to the movement. The export of the revolution policy highlighted this state capacity Iran enjoys and featured the Islamic Republic as the only state patron of Shia political movements elsewhere in the region. This does not suggest that the Islamic Republic is endorsed by all Shia communities and Shia movements in the region. As discussed before, not all clerical centers share the Iranian-style Shia political activism and maintain their quietist positions. Moreover, those who share Iranian political activism might not always share *velayet-e faqih* as a proper form of Shia governmentality. However, as the coming chapters will discuss in detail, some foreign policy analysts interviewed for this study emphasize the Islamic Republic being the only Shia patron with extensive state capacity to help the marginalized Shias of the region despite all odds. The export of the revolution policy has made powerful non-state allies to Iran such as the Lebanese Hezbollah. The IRGC-Qods Forces activities in the region provided the Islamic Republic with experience in interacting with the Shias elsewhere and mobilizing them for political ends.

The keyword is experience. The Islamic Republic has forty years of experience in Islamic state building, Holy War, and the export of the revolution. When asked about Iranian strength over the mobilization of Shias after 2003 compared to other regional powers, one former Iranian diplomat interviewed for this study emphasized the fact that

'Iran has a forty year of experience in such mobilizational activities'[449] The question for the next chapter is what is the legacy of this historical process on Iran's axis of resistance policy in the region today. Does Iran pursue an Islamist foreign policy objective and aim to export *velayet-e faqih* to other Shia movements in the region? Or does religion play a different role under the more consolidated revolutionary regime? The next chapter will be the first step to explore these questions.

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[449] Hossein Malaek, former ambassador of the Islamic Republic of Iran to China, a senior foreign policy and international relations expert and head of the foreign policy unit at Center for Strategic Research in Tehran, Iran. Interview with the author conducted on August 14, 2016 at Center for Strategic Research, Tehran, Iran.

CHAPTER 4

IRAN'S FOREIGN POLICY IN IRAQ AND SYRIA

4.1. Introduction

As discussed in the previous chapter, Iran's foreign policy during the first decade of the revolution is of immense importance in understanding the role of religion in revolutionary Iran. 'The Holy Defense War' and the 'export of the revolution' policies reflected the central tenets of Iran's Islamic revolutionary ideology, where the defense of the fledgling Islamic regime and the establishment of an Islamic *Ummah* under the leadership of the Islamic Republic were the central foreign policy objectives. Iran's foreign policy during the first decade was thus an ideological foreign policy. However, post-war reconstruction needs, the grave experience of international isolation, and economic necessities pushed Iran's foreign policy towards relatively more pragmatist positions during the pragmatist leadership of Rafsanjani and Khatami. The shift towards realist and pragmatist considerations did not in any way lead to a total break-away from the ideological core of the Islamic Republic. The shifts were rather felt by the issue area and the geographical sphere of foreign action and Iran's foreign policy on the Middle East after 2003 would be a one example of this.

The period between 2003 and 2017 reflects multiple foreign policy tendencies in Iran both in terms of policy behavior and discourse. This multiplicity goes hand in hand with the changes in the Iranian leadership. The reformist president Khatami was still in office until 2005, which was then taken over by the hardliner populist leader Mahmoud Ahmadinejad until 2013, when he was replaced by another centrist-pragmatist president

Hassan Rouhani. The most remarkable issue that brought Iran face to face with the USA and European Union was the disclosure of Iran's secret nuclear activities in 2003 and the ensuing international crisis concerning the Nuclear Non-Proliferation regime. Iran's cycles of engagement and disengagement with the international community on the resolution of the nuclear issue were in line with respective leadership changes, which implicated the centrality of multiple domestic political factions and factional tendencies in Iran's foreign policy. Accordingly, the reformist Khatami administration, which was intent on maintaining favorable relations with the West, suspended its nuclear program upon an agreement signed with the EU, which was only nullified a few days after the hardliner president Ahmadinejad came to power. On the other hand, the period between 2013 and 2017 was the pinnacle of reconciliation with the West, as Rouhani, the chief nuclear negotiator of the Khatami administration, came to office as the president of the Islamic Republic and signed the historic nuclear deal with the P5+1.

Iran's 'Western' foreign policy exhibited perpetual shifts between the regime's ideological core and pragmatism. This 'Western' foreign policy revolved predominantly around the nuclear issue. While the nuclear issue was not the only foreign policy issue area for Iran, it was by far the most popular one. In 2003, the US invasion of Iraq foreshadowed profound, successive transformations in the Middle East region for the decades to come. The Islamic Republic was quick to immerse itself in observing the new regional realities and calculating its place within this new context. Both foreign policy scholars and foreign policy makers alike failed to pay the same level of attention to Iran's Middle East policy as they did to the nuclear issue. Compared to the relations with the West, the Middle Eastern policy of Iran was rather monotonous, consistent and determined. The policy had rather strong religious and ideological overtones, where alliances with the Shia communities stood out. In this respect, the Middle East policy resembled Iran's first decade policy of 'export of the revolution.' Moreover, the ideological and religious-looking foreign policy on the Middle East co-existed and was co-practiced with the overly more pragmatist nuclear policy.

This chapter is designed to discuss Iran's foreign policy on the Middle East region after 2003 with an emphasis on the role of religion in foreign policy-making. The chapter first discusses the cascade of transformations in the region since 2003 as well as the risks and the opportunities the regional changes brought for the Islamic Republic. The chapter

will continue with a discussion of Iranian foreign policy strategy in the region. The cases of Iraq and Syria are singled out as the two most striking cases where Iranian foreign policy resembled 'the export of the revolution' policy due to the strong presence of religious, identity-related, and ideological elements. This chapter shows that the Islamic Republic has brought its institutionalized experience from the revolutionary decade in addressing the changes in the region. Three separate but inter-linked foreign policy behaviors of the Islamic Republic in Iraq and Syria will justify this point: 1) the involvement of Iran's unconventional forces spearheaded by the IRGC as the central foreign policy 'actor' in these territories, 2) the extensive Iranian support for the Shia political and armed mobilization; 3) the Iran-led state-building efforts in the security sector, where the IRGC enjoys extensive influence over the creation and reconfiguration of paramilitary institutions such as *Hashd al-Shaabi* in Iraq and *Jaysh al-Shaabi*/National Defense Units in Syria.

4.2. The Transformation of the Middle East Since 2003

The first step to understand the Iranian policy on the region is to understand the interaction context within which the state operates. The Middle East region has been undergoing both internally and externally defined systemic transformations since the last decade. One can list three critical junctures in the recent history of the region, each of which added another layer of shocks on top of each other: 1) the US invasion of Iraq in 2003; 2) the tumultuous year of 2011, which involved the eruption of the Arab Spring, the civil conflict in Syria, and the withdrawal of American troops from Iraq; and finally, 3) the rise of the Islamic State (ISIL) in 2014. Each of these events were transformative for the region with strong implications on the existing power relations, the established political order, and the types of perceived threats.

The US invasion of Iraq in 2003. The US invasion in 2003 had several implications for the region. First, the American arrival in the Iraqi territories perpetuated the penetrated image of the region by an international superpower. The invasion came right after the strong US discourse of the 'axis of evil' and necessity of 'regime change' in respective countries. Iraq was apparently the first destination for a regime change,

creating uneasiness on the part of both Iran and Syria as two referents of 'the axis of evil' discourse. Second, the fall of the Saddam regime and the destruction of the Iraqi army created a power vacuum in the region. The power balances in the region started to change slowly, foreshadowing an emerging competition among Iran, Turkey, Saudi Arabia, and Israel all vying for regional leadership.[450] Third, the fall of the Baath regime in Iraq, the epitome of Arab nationalism in the northern axis, signaled an emergent change of the political order inside this regime. The newly introduced electoral politics in Iraq required a sociopolitical reshuffling inside Iraq, where ethnic, religious and sectarian identities came to the fore. As a matter of fact, sectarian tensions between the Sunni and the Shia surfaced as early as 2006 as a reflection of the shifts in socioeconomic and political power between two groups.[451] This meant that the existing political order in Iraq, the balance of power among ethno-religious groups, and Arab nationalism as a unifying political ideology was already disturbed well before 2011.

The Arab Spring of 2011. The year 2011 was critical in deepening the changes that already started in 2003 in Iraq. First, the political upheavals that swept Egyptian and Tunisian streets were an outcry against the deep-seated authoritarianism in the region. Economic inequalities, poor governance under authoritarian systems, and political suppression led people to the streets for democratization and political reform. The Arab Spring was thus a confrontation between the authoritarian incumbent regimes and the chants for democracy in the North African countries.[452] The sociological structure of the polities determined who would be the parties to this political confrontation. In the Egyptian cases, this was manifested between secularism and political Islam. However, when the uprisings reached countries like Syria, Yemen, and Bahrain, where the socioeconomic and political system is drawn along sectarian lines, the democratic confrontation took sectarian overtones. Abdo distinguishes two definitions of sectarianism in the Middle East in this respect. In its traditional form, sectarianism meant 'a set of institutional arrangements determining familial, local, regional, and even broader

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[450] For an analysis of how international and regional players received the Iraqi invasion, see Rick Fawn and Raymond Hinnebush, eds., *The Iraq War: Causes and Consequences* (Lynne Rienner Press, 2006).

[451] See James DeFronzo, *The Iraq War: Origins and Consequences* (New York: Routledge, 2009), Chapter 10.

[452] See Mark Lynch, *The New Arab Wars, Uprisings, and Anarch in the Middle East* (New York: Public Affairs Books, 2016); John Davis, *The Arab Spring and Arab Thaw: Unfinished Revolutions and the Quest for Democracy* (London and New York: Taylor and Francis, 2013); Mark L. Haas and David Lesch, eds., *The Arab Spring: Change and Resistance in the Middle East* (Boulder, CO: Westview Press, 2013).

kinds of loyalty and affiliation' as manifested in the Iraqi and Syrian Baath regimes.[453] In its traditional form in Iraq and Syria, sectarianism determined the allocation of economic and political resources among different segments of the society of the basis of patrimonial linkages defined by sectarian identities. The sectarian civil wars that erupted in Iraq in 2006 and in the aftermath of the Arab Spring in other countries, on the other hand, were 'primarily the result of the collapse of the authoritarian rule and a struggle for political and economic power, and over which interpretation of Islam will influence societies and new leaderships'[454] The (near) collapse of the authoritarian rule and the demands for democratization meant a shift of the existing economic and political power from one sectarian group to the other, as a result of which uprisings turned into sectarian conflicts in these territories.

The proxy war in Syria in 2011. The civil war did not remain limited to a confrontation between two sectarian groups within the Syrian borders and quickly turned into a proxy war, pulling regional powers and international powers as stakeholders into the conflict. The Syrian conflict thus soon turned into the central arena of a regional power game among Iran, Turkey, and Saudi Arabia.[455] However, the game was not only played on hard power capabilities, but also on soft power, where the type of the new political ideology to replace the old became a matter of contention. In this respect, the Syrian war became an arena where all prospective regional powers sought to spread their respective political ideologies. Each regional player supported armed groups and militias that propagated for their respective political ideologies, which would help expand their sphere of political influence in the region. The regional state powers were soon joined by global jihadist networks and their local branches. In the end, the decay of the existing Arab authoritarian regimes was followed by this ideological proxy war created what Haas termed as an 'ideological multi-polarity' in the region.[456] According to Lerman, four fault

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[453] Genevive Abdo, *The New Sectarianism: Arab Uprisings and the Rebirth of the Shia-Sunni Divide* (New York: Oxford University Press, 2016), p. 7-8.

[454] Ibid., p. 8.

[455] See Emile Hokayem, 'Iran, the Gulf States and the Syrian Civil War,' *Survival: Global Politics and Strategy* 56, no. 6 (2014): p. 59-86; and Gregory Gause, III, 'Beyond Sectarianism: The New Middle East Cold War,' *Brookings Doha Center Analysis Paper*, no 11, July 2014, https://www.brookings.edu/wp-content/uploads/2016/06/English-PDF-1.pdf.

[456] Mark L. Haas, 'Ideological Polarity and Balancing in Great Power Politics,' *Security Studies* 23, no. 4 (2014): p. 715–53. Also see Mark L. Haas, *The Clash of Ideologies and American Security* (Oxford University Press: Oxford, 2012).

lines characterized the ideological map of the Middle East between 2011 and 2016: 1) electoral Islamism along the Muslim Brotherhood, Turkey, and Qatar axis, 2) the Salafi jihadist ideology exemplified by a divided jihadist network of Al-Qaeda, al-Nusra, and later ISIL, 3) the predominantly Shiite axis of Iran, Syria, Iraq, and Lebanese Hezbollah, and finally 4) the so-called 'forces of stability' which encompassed Saudi Arabia, Egypt, Israel, and other Gulf countries – so-called by Lerman due to their unchanging alliance with the USA.[457] What is remarkable in this ideological mapping is the factionalization of Sunni political ideologies, while the Shia political ideology, spearheaded by the Islamic Republic, seemed to be more unified. Gause believed that this 'ideological polarity' *a la* Haas within the Sunni camp is the reason for the absence of a stable sectarian alignment between Saudi Arabia, Turkey, Egypt, Jordan, and the Gulf against the emerging Shia alignment led by Iran.[458] Despite the absence of a unified sectarian block along Sunni lines, sectarianism still made itself felt region-wide as the power game for regional leadership especially between Saudi Arabia and Iran. Sectarianism thus became the new name for geopolitics in the region, where the rivalry between Saudi Arabia and Iran played out for support for Sunni and Shia factions in Lebanon, Iraq, Yemen and Bahrain.[459] In short, the Arab Spring provided the background for the emergence of new political ideologies in the region, which was deepened with the Syrian civil war after 2011. Ideological multi-polarity characterized the region, with religious and sectarian overtones, which impacted the course of geopolitical rivalries in the region.

Withdrawal of American Troops in 2011 and *the rise of ISIL in 2014.* The American withdrawal from the Iraqi territories was the third critical moment in 2011 for regional balances.[460] The withdrawal of the superpowers meant a bigger room for regional powers to step a decisive manner. The security situation deteriorated in Iraq following the withdrawal, leading to a more severe round of sectarian conflict. Both Iraq and Syria

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[457] For a detailed discussion of all ideological fault lines, see Eran Lerman, 'The Game of Camps: Ideological Fault lines in the Wreckage of the Arab State System,' *Mideast Security and Policy Studies, The Begin-Sadat Center for Strategic Studies*, no. 124, 2016.

[458] Gregory Gause, III, 'Ideologies, Alignments and Underbalancing in the New Middle East Cold War,' *PS: Political Science and Politics* 50, no. 3 (July 2017): p. 674.

[459] See Bassel Salloukh, 'The Arab Uprisings and the Geopolitics of the Middle East,' *The International Spectator: Italian Journal of International Politics* 48, no. 2 (2013): p. 33-35.

[460] See Frederic Wehrey, et. al., 'The Iraq Effect: The Middle East After the Iraq War,' *RAND Corporation*, 2010, https://www.rand.org/content/dam/rand/pubs/monographs/2010/RAND_MG892.pdf.

simultaneously experienced what can be called as state failure amidst increasing religious and sectarian conflicts. It is therefore no coincidence that a global jihadist fall-out from Al-Qaeda called ISIL chose Iraqi and Syrian territories as its base of operation in 2014.[461] The capture of Mosul by ISIL in 2014 and its subsequent expansion on the Syrian territories created grave human costs. The rise of ISIL redefined the types of threats in the region. ISIL's aggression was against the Shias, other non-Sunni populations, and non-jihadist Sunnis, which especially alarmed the Islamic Republic of Iran on the double grounds of its national security and that of the fellow Shia populations in the region. The state failure on Iraqi and Syrian territories would legitimize regional powers' intervention in these territories in an extended level, in the name of fighting against jihadism, extremism, and radicalism.

In conclusion, by 2014, the Middle East region had turned into a place where the regional power balances were disturbed, the existing political order was challenged by the emergence of multiple political ideologies, non-state actors and militias had emerged as new actors of regional politics, and threat perceptions had changed. Such extensive transformations would create both opportunities and risks for all the players involved, including Iran.

4.2.1. The Iranian Response I: Risks

What impacts did regional transformations have on Iran? Interviews with several Iranian experts on foreign policy by the author show the strategic outlook of the Iranian experts on the issue. A majority of the interviewees adopted a language that reflected the Iranian risks, opportunities, and perceived threats – all neatly fitting a rationalist foreign policy logic. Nevertheless, as will be shown below, interviewees also did not refrain to use the Islamic Republic's Islamist discourses. Most interviewees agree on the proposition that the Iranian response to transformations in the region were reactive in nature. The transnational change shaped the course of Iran's foreign policy strategy. Iran was quick to recognize the opportunities and risks associated with the new reality of the region. Each threat that posed a risk for the Islamic Republic also carried opportunities.

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[461] 'The Rise and Fall of ISIL Explained,' *Al-Jazeera*, June 20, 2017, https://www.aljazeera.com/indepth/features/2017/06/rise-fall-isil-explained-170607085701484.html.

The capability to transform the risks into opportunities would determine the level of success Iran would enjoy in the region after 2003. The regional transformations created several risks for Iran. According to the interviews, as the crisis throughout the region was first and foremost a security-based crisis, the associated risks for Iran were security-related.

The American Invasion. The American invasion on its western borders was deemed as a threat to both the national security and the regime security of Iran. According to Interviewee 4, an Iranian foreign policy expert, the security-related priority for Iran in the last decade is 'the survival of the political system,' which was already endorsed by Khomeini's famous saying following the cease-fire with Iraq in 1988 'The survival of the systems precedes the Islamic law.'[462] In this respect, 'political stability,' which is critical for the continuation of the state, and 'territorial integrity' are the other components of Iran's priorities in the security sector. In the Islamic Republic's discourse, 'the main threat after the revolution is the USA, because it is a great threat to the system.'[463] The emergence of the USA on the western border, which is ingrained in the revolutionary Iran's state discourse as 'the Great Satan,' the main perpetuator of *estekbar,* i.e. the global arrogance, and imperialism, was alarming for the regime. This was further coupled by Bush's 'axis of evil' and 'regime change' rhetoric, which would mean that Iran might be on the list for invasion and directly threaten Iran's regime security. According to the interviewee, the American presence in the region would also perpetuate the risks associated with Iran's other rivals. In this respect, the USA had supported the Sunni oppositionists to the regime, Saudis, Israel, and Mujahedeen-e Khalq.[464] In the Iranian discourse, these threats are concerned with the USA, which makes the USA 'the Great Satan' for Iran's policy elites.[465]

Sunni Jihadist Terrorism. Sunni jihadist terrorism spearheaded by ISIL created a new threat to Iran's security. In this respect, interviewee Nasser Saghafi-Ameri, a former

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[462] Interviewee 4, expert on Iranian foreign policy specialized on relations with the Middle Eastern countries at Center for Strategic Research (CSR) and professor of international relations at Shahid Beheshti University, Tehran, Iran. Interview 1 with the author, conducted on August 14, 2016 at CSR, Tehran, Iran.

[463] Ibid.

[464] Ibid.

[465] Ibid.

Iranian senior diplomat argues that terrorism was one of the main reasons why Iran engaged in Iraq and Syria at the first place.[466] According to Saghafi-Ameri,

> 'The neighborhood is dangerous […] and the terrorist activities everywhere make it very difficult for any country to manage their security issues. These security concerns lead Iran to take a step towards Iraq and Syria. The priority for Iran today is to get rid of ISIL and liberating the areas under their control. ISIL, terrorism, and regional instability are the most important security concerns for Iran today.'[467]

Interviewees have varying opinions about the roots of Iranian concern with terrorism and ISIL in the Middle East. Interviewee 3, a senior Iranian international relations expert, views the ISIL threat and terrorism in Syria more from a realist lens than ideological. He argues that Syria is an issue of regional rivalry among Iran, Saudi Arabia and Turkey.[468] He reiterates the 'geopolitical rivalry' dimension in the issue of jihadist terrorism by saying that 'ISIL will be a geopolitical rivalry among countries. The ISIL policy is a part of that geopolitical rivalry. There is a more realistic approach behind identity.'[469] On the other hand, Saghafi-Ameri's speech discloses the Iranian concerns over ISIL threat to be rooted in the Shia identity, ideology and Islam as well. For one, 'Shiism is the real reason,' where the anti-Shia rhetoric of ISIL makes Iran an automatic target. Accordingly, 'Iran is at the forefront of fighting against ISIL, [as there are] attempts to penetrate the Iranian territory. Iran created a security zone for 40 km that Iran will not allow to be passed.'[470] For another, the ISIL threat is 'not only about border security, but also about Islam and ideology.'[471] According to him, 'Islam is being seen in Europe and the whole world very negatively. [As a state having] a Muslim identity, Iran is trying to protect its own Islamic ideology. Ideology and identity becomes an issue, [as] the reaction to Islam is very negative.'[472] To conclude, Iran's Shia identity and its Islamist political

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[466] Interview with Saghafi-Ameri.

[467] Ibid.

[468] Interviewee 3, a senior Iranian foreign policy expert specialized on Iran's relations with the West and nuclear diplomacy at Center for Middle East Strategic Studies. Interview with the author, conducted on September 1, 2015 at Center for Middle East Strategic Studies, Tehran, Iran.

[469] Ibid.

[470] Interview with Saghafi-Ameri.

[471] Ibid.

[472] Ibid.

ideology factor in its calculation of ISIL and jihadist terrorism both as a national security and regime security threat.

Security of the Shia communities. The discussion over Iranian concerns about the threats to its national security and regime security would be incomplete without taking into consideration the broader community threats directed against the Shias of the region. Interviewee 5, an Iranian foreign policy expert specialized on Iran-Iraq relations, emphasizes 'the strategic loneliness' felt by the Islamic Republic due to its 'historical, geographical, and religious characteristics.'[473] This strategic loneliness led Iran to define its security 'beyond [its] borders,' meaning in Lebanon, Iraq, and Syria, against ISIL.[474] Accordingly, he states that the Shias 'must have a united stance against external threats' of Wahhabism and ISIL.[475] He adds that 'There is a competition between the Salafists/Wahhabis and Shias all around the world. Because the latter are minority, they need to be a united front. DAESH is a community threat to the Shias.'[476] Accordingly, Interviewee 5 emphasizes the 'human security and community security' of the Shias, where Iranians should defend the Shia populations as well as 'the holy places.'[477] Interviewee 5's account shows that due to the Iran's beyond-borders understanding of security, the security of the all Shias of the region is very important. Securing its borders against ISIL is therefore not sufficient for Iran, as 'they are spreading' throughout the region and that risks 'the security of the partners' like 'Syria and Iraq.'[478] In other words, the security of Iran is also tied to 'the security of the Shias' as well as 'the security of the partners' in the region.[479]

The interviews with Iranian experts show that the nature of the crisis in the Middle East, characterized by a super-power penetration, proxy war, and jihadist militia

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[473] Interviewee 5, expert on Iraqi politics at Center for Strategic Research, Tehran, Iran. Interview with the author conducted on September 10, 2016 at Farhangsara Niavaran, Tehran, Iran.

[474] Ibid.

[475] Ibid.

[476] Ibid.

[477] Ibid.

[478] Ibid.

[479] Ibid.

proliferation determined the Iranian perception of the associated risks. This security-based crisis created security-related risks for Iran. The immediate American presence on the border threatened the national and regime security of Iran according to the Iranian policy elites. Likewise, the rise of the Wahhabi threat and ISIL created risks associated with Iranian regime's security and the community/human security of the Shias. It should be noted that Iran's understanding of beyond-border security interlinks all concerns about national, regime, and community-related security, thereby creating a broader lens for Iranian policy elites in viewing the regional risks after 2003.

4.2.2. The Iranian Response II: Opportunities

Despite the emergence of new risks for Iran after 2003 in the region, the regional transformations also brought significant opportunities for Iran. Some developments in the region directly presented themselves as opportunities for Iran, while for others, Iran made deliberate and concerted efforts to turn them into opportunities.

Fall of the Baathist Saddam regime in Iraq. According to Interviewee 3, 'history shaped the elites' understanding of foreign policy' in Iran and the Iran-Iraq War of 1980-88 was the moment of history with a decades-long legacy to come.[480] As discussed extensively in the previous chapter, the war is ingrained as 'the imposed war' in the Iranian foreign policy discourse, in the sense that the war was 'imposed' not only by Iraq, but by 'everyone in the world,' where 'great powers encouraged Saddam to attack Iran and transferred weapons to Saddam's regime.'[481] According to Interviewee 3, 'Iran battled for its revolution' in the war, meaning that Iran was battling to protect the young regime.[482] In this respect, he adds that Iran's 'war memory is the context,' shaping the Iran's perception of the fall of the Saddam regime in 2003.[483] The fall of the Baathist government meant the disappearance of a decades-long rival on the western frontier, who had inflicted grave economic, human, and military cost on the new Islamic Republic.

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[480] Interview with Interviewee 3.

[481] Ibid.

[482] Ibid.

[483] Ibid.

However, the memory would also draw the specific course of action for Iran to prevent a repetition of such history. According to Interviewee 3's account, 'Iran cannot let anti-Iranian sentiments come to the scene again,' meaning that Iran would make any effort to not 'let the Baathist government back again.'[484] This point is reiterated by Interviewee 4 as well. Given the fact that 'Iraq was the most important threat to Iran in the decades before, […] the type of the regime in Iraq is important for Iran.'[485] He argues that, in the post-2003 period, Iran 'does not want a Saddam-like government, but [rather] a friendly state in Iraq.'[486]

Rise as a regional power. The changes in the regional power balances following the 2003 invasion created leadership opportunities for Iran. The fall of Iraq created a power vacuum in the region to be filled by another regional power, where Iran emerged as a potential rising power in the northern axis. Iranian foreign policy experts identify the regional players' behavior in the political and military arena as a balance of power game. Given its potential to become a regional power, the Islamic Republic has adopted a policy of balancing against other regional and international players. Interviewee 4 argues that the USA gradually created a bilateral system in the Middle East after World War II, which led to an alliance among the USA, Israel, Saudi Arabia, and the Gulf.[487] Since the revolution, Iran has been balancing against this alliance by systematically building a new alliance system in the region.[488] In this game of balance, Iran is the core, whereas Syria and Lebanese Hezbollah are Iran's main allies against the US-led camp.[489] The Iran-led alliance in the region, which incorporated the Hamas and the Palestinian resistance on top of the Lebanese Hezbollah and Syria is called 'the Axis of Resistance' in the Iranian foreign policy discourse. The fall of Baathist Iraq in favor of the Shias inside the country and the political conflict of the Houthis in Yemen signaled two new potential allies for the Iran-led alliance network. This would mean the expansion of the Iran-led alliance, a greater and closer coordination among the allies, and an augmented role for Iran as the

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[484] Ibid.

[485] Inverview 1 with Interviewee 4.

[486] Ibid.

[487] Ibid.

[488] Ibid.

[489] Ibid.

patron of all included. Interviewee 2, an Iranian foreign policy researcher specialized on Iran's relations regional actors in the Middle East, reiterates this point, where he argues that 'The Iranian regime's logic in focusing on Syria and Iraq is balance of power against Turkey, Saudi Arabia, and the West. Iran is expecting to be a super power in the region with the lifting of sanctions. Once the 150 billion dollar-worth sanctions are lifted, Iran will be hard to balance in the region.'[490]

Political Shiism as a Political Ideology. One note of caution on the potential of regional players to become a regional power is that this potential does not only depend on hard power capabilities. As discussed in the previous sections, the challenges posed to the existing political order within MENA states by the Arab Spring, the (near-) state failure in Syria and Iraq, and civil conflicts opened the ground for the rise of new political ideologies. Each regional player that ended up in the game not only relied on its hard power capabilities, but also on its domestic political ideology for greater influence in the region. This created an 'ideological multi-polarity' in the region, which predominantly incorporated different versions of political Islam as propagated by a regional player. In this respect, Interviewee 2 defines three versions of political Islam in the region: 1) An authoritarian type of political Islam practiced in Saudi Arabia and some Gulf countries, 2) Electoral type of political Islam identified with the Muslim Brotherhood of Egypt, and AKP rule in Turkey, and 3) Shia political Islam, ideologically spearheaded by Iran.[491] According to Interviewee 2, the Islamic Republic's 'Shia Islam wants to introduce and establish itself as a type of political Islam in the region. It exists as a model in the region.'[492] This links back to the transnational revolutionary Islamist vision of the revolutionary regime, where the Islamic Republic has always promoted itself as a model of Islamic ideology and regime since the revolution. Hossein Malaek, a former ambassador of the Islamic Republic to China and a senior international relations expert, argued that the revolution was heavily ideologically-oriented, aimed for establishing an Islamic society, promoting Islamic ideology as a source of prosperity for other Islamic countries, supporting their emancipation from foreign influence, and solving the

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[490] Interviewee 2, an Iranian researcher on foreign policy, Turkish-Iranian relations, and regional affairs at Center for Strategic Research, Tehran, Iran. Interview 2 with the author, conducted on July 22, 2016, at Park Laleh, Tehran, Iran.

[491] Interview 2 with Interviewee 2.

[492] Ibid.

Palestinian issue.[493] That was the objective of the Islamic Republic during the first decade of the revolution, which came to a halt in the second decade despite its materialization by the Lebanese Hezbollah. According to Malaek;

> 'The year 2011 was the climax of such a dream. Islamic nations were revolting against their government in favor of the Islamic ideology. The Iranian leadership called this 'the Islamic revival.' But many intellectuals believe that this is Arab revival, and not the Islamic revival. The Turkish government was instrumentalized by the USA to facilitate the Arab processes in Tunisia, Egypt, and Libya. Iranians helped the movement in Libya, they were in favor of the processes. This was no benefit-driven attitude, no rational attitude, this was [rather] an Islamic vision to help the movements and the demonstrations. At the beginning, demonstrations and movements were peaceful. Iranians used all the leverage to put these fragile societies into an organized movement.'[494]

In other words, despite their references to rationalist concepts such as balance of power and regional leadership, both Interviewee 2 and Malaek were pointing out to the fact that the Islamic Republic had not totally renounced the transnational revolutionary logic. Rather, their assessments of regional realities, risks, and opportunities reflected the Islamic Republic's changing attitude and vision as an increasingly consolidated revolutionary regime, which carefully calculates the contextual circumstances before adopting an ideological foreign policy. The Islamic Republic was carefully calibrating the context, and the Middle Eastern context after 2003 looked like a window of opportunity for Iran to press for a more assertive presence in the region. The Iranian model, with forty years of experience in Islamic state building would be another model to be emulated by the region which was looking for an alternative political order.

The Shia Revival. In 2004, King Abdullah of Jordan warned regional leaders against the formation of a Shia-dominated alliance network in the Middle East and the growing Iranian influence in the region. He called this Iran-led Shia-dominated network 'the Shiite Crescent.' He was saying that Iran was trying to influence Iraqi elections by investing heavily in creating a pro-Iranian public opinion by salary payments and welfare provisions to the Iraqi Shiites.[495] The Iranian involvement in Iraqi politics would lead to

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[493] Interview with Malaek.

[494] Ibid.

[495] Robin Wright and Peter Baker, 'Iraq, Jordan See Threat to Election,' *Washington Post*, December 8, 2004,

the creation of a 'crescent' made up of Shiite movements and governments stretching from Lebanon on the West, to Syria, Iraq, and Iran on the East, which could change the balance of power between the Sunnis and the Shiites in the region and generate problems for the USA and its Gulf allies.[496] The term 'Shiite Crescent' soon entered the political and academic discussions, where several works were published discussing the existence and/or implications of the Shiite Crescent for the politics of the Middle East.[497] The Islamic Republic rejected the term for its overt sectarian connotations, claiming that Iran was supporting both Sunni and Shia resistance movements with ideological similarities, the most prominent example being the PLO. Despite the Iranian rejection of a 'Shiite Crescent,' the post-2003 period witnessed a gradual and undeniable level of Shia empowerment across the region. What started in Iraq as the political mobilization of Shiite populations for electoral politics spread to Gulf countries with sizeable Shiite populations when the demands for democratic inclusion were raised following the Arab Spring. The Shia revival would create strong opportunities for Iran in becoming the patron of these Shia populations demanding a greater say in their home countries. The emerging patron-client relationship between Iran, as the only modern Shia state with remarkable state capacity to support these movements, would soon threaten the internal balance and political power in Sunni dominated territories. As a result, as Saghafi-Ameri argued, soon 'The Shiite Crescent reflected geopolitical struggle between the Arabs and Iran, [where] King Abdollah of Jordan coined the term to bring together the Sunni countries against Iran to check Iranian power in the region.'[498] The Saudi Arabia – Iran rivalry took a rapid turn inside the politically and structurally weak Middle Eastern states where both Sunni and Shiite populations co-existed. Both regional players extended political and financial assistance to their fellow sectarian and/or ideological factions across the region: in Palestine (Hamas vs. Fatah), Lebanon (Hezbollah vs. March 14 block), Syria (Assad vs. the Islamists), and in Iraq (Sunnis vs. Shiites).[499] In short, as interviewee Abbas Khalaji,

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http://www.washingtonpost.com/wp-dyn/articles/A43980-2004Dec7.html?noredirect=on

[496] Ibid.

[497] See Barzegar, 'Iran and the Shiite Crescent: Myths and Realities,' passim; Nasr, *The Shia Revival,* passim; Amir M. Haji-Yousefi, 'Whose Agenda is Served by the Idea of a Shia Crescent?' *Alternatives: Turkish Journal of International Relations* 8, no. 1 (2009): p. 114-135; Maximilian Terhalle, 'Are the Shia Rising?' *Middle East Policy* 14, no. 2 (2007): p. 69-83; and Salloukh, 'The Arab Uprisings and the Geopolitics of the Middle East,' passim.

[498] Interview with Saghafi-Ameri.

[499] See Gause, 'Beyond Sectarianism,' https://www.brookings.edu/wp-content/uploads/2016/06/English-PDF-1.pdf.

a former professor of Iranian foreign policy, states, 'The Shia revival is the natural product of the regional context after 2003. After the 2003 invasion and their subsequent pull-back, a power vacuum emerged, which Iran filled in the Shiite-populated regions,'[500] with extensive ramifications across the region in the years to come.

4.2.3. The Iranian Response III: Strategy

What dominant strategy has Iran adopted against the regional developments after 2003? The revolutionary period's legacy over Iran's Middle East policy after 2003 has pressed its force more on the type of the strategy Iran adopted. Accordingly, the Iranian regime repeated its basic strategies during 'the export of the revolution.' As the coming sections will discuss in more detail, the Iranian regime chose to establish sub-state level relationships with the Shias in the region, sent out IRGC as the primary contractor of the Middle East policy in the field, and relied extensively on its peculiar security culture marked by unconventional capabilities and sectarian identity as a mobilizational force. The interviews have thus shown that the Iranian experience of the export of the revolution, the ideological security-system building, and the ensuing development of Iran's peculiar security culture have all been institutionalized over decades and constituted Iran's capabilities and strategies after 2003 in the region.

Establishing Sub-State Level Relations. The most outstanding Iranian foreign policy strategy in the Middle East is establishing relations not as much at the state-level relations as sub-state level. The Middle East is a region marked by weak and/or incomplete state-building processes. As discussed above, the ethnic, religious, and sectarian factionalization within the weak states facilitate cross-border alignment with state patrons. In the case of Shia revival, Interviewee 2 argues that Iran sees this issue 'not as a state-level, but as a group and organization-level issue'[501] Iran is the first standing example or a modern Shia state in the region, whereas the rest of the Shias are either minorities in their home countries or face discrimination under the rule of non-Shia factions. While Iran could 'not engage in strategic relations with the Sunnis at the state-

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[500] Interview with Khalaji.

[501] Interview 2 with Interviewee 2.

level,' it has turned towards group-level and organizational-level relations with the Shias in these countries.[502] In Interviewee 2's words, 'Iran does not invest in states, it invests in organizations. Wherever there are ideological Shia groups, Iran is there.'[503] When we look at Iran's relations with the region since the revolution, we observe that this has always been the basic Iranian strategy. Iran established close relations ideologically-affiliated Shias of Lebanon, the Shias in Iraq, the Palestinian resistance and Hamas, and Houthis in Yemen. The experience of the revolutionary period should again be reiterated here. Interviewee 8 emphasizes the centrality of Iranian experience in this respect, where he says 'Iran has had much chance and experience in how to make groups and militia like Hezbollah, Hamas, active Shia groups in Iraq and Afghanistan. It knows how to get involved in the crisis and how to get out of that.'[504]

IRGC as the Primary Foreign Policy Actor in the Region. Given the fact that the nature of the conflicts in the region are security-based conflicts and the basic Iranian strategy is establishing sub-state relations with domestic groups sharing an identity or ideology-based affinity with Iran, the IRGC, and not the traditional Foreign Ministry, became the contractor of Iran's Middle East policy today. The centrality of the IRGC in Iran's Middle East policy has been emphasized by several interviewees several times during the field research. Interviewee 2 argued that 'The Foreign Ministry of Iran does not much influence on the matters pertaining to Syria, Iraq, and Yemen and the decision-making power in these countries is 70 % in the hands of Qods Force.'[505] However, Interviewee 10, a Turkish expert on Iran's security establishment, emphasizes the limitations on the decision-making power of the IRGC in the region, instead stating that the IRGC is responsible to the Supreme Leader, who is the ultimate decision-maker in Iran's foreign policy.[506] He differentiates between decision-making power and policy implementation in this respect. Accordingly, the IRGC is one of the decision-makers in

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[502] Ibid.

[503] Ibid.

[504] Interview with Interviewee 8.

[505] Interview 1 with Interviewee 2, an Iranian researcher on foreign policy, Turkish-Iranian relations, and regional affairs at Center for Strategic Research, Tehran, Iran. Interview 1 with the author, conducted in September 2015, Park Mellat, Tehran, Iran.

[506] Interviewee 10, Turkish professor of international relations specialized on Iranian security establishment. Meeting with the author on April 6, 2018 in Ankara.

the National Security Council, the Supreme Leader is the ultimate decision-maker, but in terms of action and policy implementation, the IRGC is the biggest actor in the field.[507]

The question at this point is why the IRGC and not the Foreign Ministry is the dominant actor in the Middle East. As discussed before and highlighted by Interviewee 5, Iran's beyond-border security understanding is one reason for the centrality of IRGC in this policy. As Interviewee 10 explains, the Iranian regime treats the security risks in the region as 'an issue of regime security' and thus directly refers the Middle East file to the IRGC, who is responsible for the external and internal security of the Islamic Republic according to the Islamic Republic's Constitution.[508] However, Abbas Khalaji's interview shows that the IRGC also has its own ideological and domestic political reasons to invest in the regional policy. Ideologically speaking, Khalaji says that IRGC and other conservative institutions are responsible to export the revolution and 'the mentality of regime exportation is still there among these groups and this is a very important objective.'[509] 'The Middle East is the destination for the export of the revolution,'[510] he adds, which suggests that the domestic developments in the Arab countries and the Shia revival after 2003 is evaluated as another opportunity to manifest this ideological objective. Besides the revolutionary ideology, Khalaji also argues that 'All revolutionary institutions and organizations like IRGC, Imam Khomeini Relief Committee, the Foundation of the Oppressed, and the *Basij* Forces see that their power will increase by exporting the Shiite Revolution.'[511] External power will help the revolutionary institutions increase their leverage in domestic politics and balance the reformists internally.[512] In other words, external power in Syria, Iraq, and Yemen means greater domestic power inside Iran. It should be concluded that, irrespective of the IRGC motives in the region, IRGC is the most influential actor in Iran's foreign policy and any analysis on the matter should focus on their activities in the region. It should also be emphasized that their role in the Middle East policy is independent of any presidential change and

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[507] Ibid.

[508] Ibid.

[509] Interview with Khalaji.

[510] Ibid.

[511] Ibid.

[512] Ibid.

factional power shifts within the regime, which gives the Iranian foreign policy strategy in the Middle East a more monotonous, consistent, and institutionalized outlook.

Unconventional Capabilities. As discussed in the previous chapter, Iranian security culture relies more on unconventional capabilities than conventional ones. The centrality of IRGC and its affiliated institutions in the security sector - as ideological security institutions with a hybrid organizational structure of an army and internal security force simultaneously - and the IRGC-Qods Force's experience in mobilizing domestic groups in other countries overlap with the above-discussed items of Iranian strategies in the Middle East today. It should therefore be noted that Iran continues to rely on its unconventional capabilities in the Middle East region. It should be emphasized that religious identity and ideology acts as a crucial mobilizational element in this respect. It will be discussed in the coming sections that a common Shia identity, popular mobilization, and ideology and/or identity-based security institutions will be the basic tenets of Iran's use of unconventional capability in Iraq and Syria.

The regional transformations and the Iranian interviewees evaluation of them provide several hints about the role of religion in Iran's Middle East policy after 2003. First, the transnational context is characterized by more religious elements than any other previous period. The rise of various Islamist political ideologies as possible alternatives for a new political order in the region, the complicated nature of democratization in Iraq and Syria as tied to sectarian politics, and the rising sectarian conflicts in the region provided a favorable regional context for the Islamic Republic. Nevertheless, as the interviewees showed, the Islamic Republic has been more concerned with the rational calculation of the risks and opportunities this favorable environment raises for Iran. The interviews suggest that Iran's grand visions of being the patron and a political model for the rising Shia movements is still alive. However, unlike the revolutionary period, the regional realities determine the extent of the Iranian ambition to go after this vision and the content of the associated policies. On the other hand, the revolutionary period's legacy over Iran's Middle East policy after 2003 has pressed its force more on the type of the strategy Iran adopted. In this respect, the IRGC – Qods Forces and the Iranian model of security organizations became the central components of Iranian strategy in Iraq and Syria. Moreover, the pre-existing Shia networks the Iranian regime invested in during the export of the revolution policy, most notably in Iraq proved to be an asset for the Iranian

regide after 2003. A similar trend is observable with Lebanese Hezbollah as well, who became the central stakeholder ensuring Iranian interests in Syria after 2011. The following sections will discuss Iran's relations with Iraq and Syria with a specific focus on this aforementioned-point.

4.3. Iran's Relations with Iraq in the post-2003 Period

The immediate impact of the US intervention in Iraq on Iran was the creation of several political and economic opportunities. A non-Arab, Shia, and Islamic revolutionary state with a history of resisting the established regional order and attempts to export its political system to available countries in the region, the Islamic Republic was usually seen as a threat by regional players including Saddam's Iraq. This contributed to the Islamic Republic's perception of isolationism in the region, which Interviewee 5 calls 'the strategic loneliness' of Iran in the Middle East.[513] As discussed above, the Iranian response to this perceived strategic loneliness was forging sub-state level alliances with social movements sharing ideological, identity-based, and political affinities with Iran. This strategy required a deeper penetration into the domestic politics and societies of the respective states. The weakening of the state apparatus and the shifts of domestic power balances in favor of the Shiites in Iraq facilitated the execution of this very strategy for the Islamic Republic.

The fact that the 60 – 65 % of the Iraqi population are of Shia identity was an important opportunity on the co-sectarian Iran.[514] The federalization of the Iraqi political system and the introduction of electoral politics lead to political mobilization on ethnic and sectarian lines. The fall of the Baath regime thus meant a rapid process of political empowerment on the part of the Iraqi Shias who were politically marginalized before, but constituted the electoral majority now. As Abbas Khalaji emphasizes in his interview, the Shia revival in Iraq 'was rooted in the political system of Iraq,' where they 'had to

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[513] Interview with Interviewee 5.

[514] See US Department of State demographics on Iraq, 'Iraq,' *US Department of State Website*, accessed December 27, 2017, https://www.state.gov/j/drl/rls/irf/2003/24452.htm.

empower themselves' following the end of the Baath regime.[515] The political marginalization of the Iraqi Shias during Saddam's rule was already shared by all the fragmented communities of Shias across the region except for Iran, which had institutionalized the Shia political power in the form of a modern nation-state. The Islamic Republic, thus emerged as the main supporter of these fragmented communities ranging from Lebanon to Bahrain and Saudi Arabia.[516] Regarding the Iranian patronage for the Shias, Malaek states that 'The Shia communities know that there is a center for moral and material support and Iran served this purpose for a long time. This is a fact.'[517] Malaek's point is supported by a public opinion survey conducted among the Iraqis in 2012, where the Iraqi Shiites see Iran a model for themselves, showing that sectarian and religious commonalities play a role in determining the people's perceptions about an external model.[518] In Mostafa Dehghan's terms, 'Most of the Iraqi Shiites see Iran as a big brother,' thereby facilitating closer relations between the Iraqi Shias and Iran after 2003.

The immediate positive impact of the post-2003 period on bilateral relations can be analyzed at cultural and political levels. Culturally, sectarian affiliation posed the greatest opportunities for close connections. This was mostly realized about the Shia *hawzas* of Najaf and Karbala. Trans-national clerical relations gained momentum between Qom, Najaf, and Karbala, where Shia clerics paid bilateral sabbatical visits to respective *hawzas*.[519] Religious tourism between the Holy Shrine cities of Najaf, Karbala, and Mashad in Iran became popularized.[520] As a part of the religious tourism, the Arbaeen pilgrimage gained a center stage.[521] Two million Iranians go to Karbala for Arbaeen ceremonies annually, while many Iraqis come to Mashad to visit Imam Reza's shrine.[522]

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[515] Interview with Khalaji.

[516] Interview with Malaek.

[517] Ibid.

[518] Talha Köse, Mesut Özcan, and Ekrem Karakoç, 'A Comparative Analysis of Soft Power in the MENA Rehion: The Impact of Ethnic, Sectarian, and Religious Identity on Soft Power in Iraq and Egypt,' *Foreign Policy Analysis* 12, no. 3 (2016): p. 354-373.

[519] Interview with Malaek.

[520] Interview with Interviewee 5; and interview with Dehghan.

[521] Arbaeen is an annual Shia pilgrimage to Karbala to commemorate the martyrdom of Imam Hossein forty days after the Ashura. Pilgrims travel to Karbala from other Iraqi cities on foot up to twelve days. Arbaeen is comparable to the Sunni pilgrimage to Mecca in terms of its religious importance and it is claimed to outnumber Mecca in terms of the number of its attendants annually.

[522] Interview with Interviewee 5.

The Iranian regime has invested in the technical and infrastructural components of the Arbaeen tourism. In 2014, the Qods Force commander Qasem Soleimani is reported to order the construction of a road to another shrine city of Samarra.[523] For the 2017 ceremonies, Iranians opened two medical clinics to the service of the pilgrims who walk several days on foot from their home cities to Karbala.[524] Iran also cooperated with the Iraqi state on the security of the pilgrims during the Arbaeen, where Iran's air defense forces provided air security to the pilgrims.[525] In short, early cultural relations concentrated on Shia commonalities, pilgrimage visits, and ceremonies.

Politically, the fact that religious demographics is in favor of Shia Arabs signified the accumulation of political power in the hands of Shia political actors in electoral politics with ramifications over the political reconfiguration of the post-Saddam Iraqi state in favor of the Shia political actors. As Interviewee 5 emphasizes, forging connections to Iraqi Shia political parties was the primary foreign policy strategy Iran employed for greater political influence over this country.[526] Iranian links to Shia political groups in Iraq have attracted attention during the last decade, but the bilateral links date back to the Holy Defense War in 1980s. During this time, several Shia groups with armed wings in Iraq allied with Iran against the Saddam regime both at the ideological and military levels. Relations with the Shia communities in Iraq was established mostly through the IRGC- Qods Force's efforts in Iraq. As the Qods Force was a military entity originally tasked with spreading the Islamic Republic's ideology to neighboring Muslim lands during the 1970s, establishing deep network-style relationships with Shia entities was necessary to achieve mobilizational capacity among Iraqi Shias. The Qods Force's ambition to mobilize the Shias for an Islamic revolution against the Saddam regime was materialized by 'the Islamic Resistance' movement in Iraq during the 1980s, although the armed movement did not achieve to topple down the Saddam regime and establish an Islamic regime.[527] The Islamic Resistance discourse was hence active during the 1980s

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[523] Garrett Nada, 'Part 1: Iran's Role in Iraq,' *Wilson Center*, 26 April, 2018, https://www.wilsoncenter.org/article/part-1-irans-role-iraq.

[524] 'Iran, Iraq Officials after Strenghtening Security for Arbaeen Pilgrims,' *The Iran Project*, November 8, 2017, https://theiranproject.com/blog/2017/11/08/iran-iraq-officials-strengthening-security-arbaeen-pilgrims/.

[525] 'Air Cover for Arba'een Pilgrims,' *Financial Tribune*, November 24, 2015, https://financialtribune.com/articles/people/30911/air-cover-for-arba-een-pilgrims.
[526] Interview with Interviewee 5.

[527] Nicholas A. Heras, 'Iraq's Fifth Column: Iran's Proxy Network,'*MEI Policy Paper*, 2017, p. 4-5,

in Iraq and it was a strong mobilizational discourse among the pro-Iranian Iraqi Shias during the Holy Defense War. The Qods Force's network style armed mobilization model during the 1980s would provide the necessary infrastructure for Iranian engagement in the post-Saddam period.

When the Holy War was over, the cadres of these Shia opposition groups sought refuge in Iran and maintained their network links, institutional structures, and mobilizational capabilities thanks to Iranian support. After the outbreak of 2003 Iraq War, these groups went back to their homelands and they attained a central place in Iraqi electoral politics due to their entrenched networks and mobilizational structures in post-Baath Iraqi political system in 2003. The Iranian investment in the mobilization of Shia communities in Iraq started to pay off during the post-Saddam period. In this respect, the Supreme Council for Islamic Revolution in Iraq (SCIRI) and its military wing called the Badr Brigades became the most powerful allies of Iran in the Iraqi politics. SCIRI was established in the 1980s during the Iran-Iraq War as an opposition force to the Saddam regime.[528] Iran had the closest ties to SCIRI and Badr during this time, as the Islamic Republic supported this group as a proxy along with the Lebanese Hezbollah, both of which were Iran's 'export of the revolution' projects.

Like the Lebanese Hezbollah, SCIRI adopted Iran's *velayet-e faqih* as its political ideology. SCIRI rebranded itself in Iraq's new political environment in 2007 though, where the group dropped 'Islamic Revolution' from its banner and changed its name to Islamic Supreme Council of Iraq (ISCI).[529] The Badr Brigades were largely transformed into a reconstruction and development organization through social work back in 2003.[530] A good number of Badr members were also incorporated into the Iraqi police, army, and security forces after the invasion.[531] The party's transformation reflected the group's new political position in the post-invasion electoral processes in a demographically Shia-

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https://www.mei.edu/sites/default/files/publications/PP2_Heras_IraqCT_0.pdf.

[528] 'Badr Organization of Reconstruction and Development,' *Stanford University Mapping Militant Organization Database*, accessed May 28, 2017, http://web.stanford.edu/group/mappingmilitants/cgi-bin/groups/view/435.

[529] Ibid.

[530] Ibid.

[531] See Eisenstadt, Knights, and Ali, 'Iran's Influence in Iraq: Countering Tehran's Whole of Government Approach,' http://www.washingtoninstitute.org/uploads/Documents/pubs/PolicyFocus111.pdf.

dominated Iraq: SCIRI had decided to be integrated into the Iraqi state as a national political force by distancing itself ideologically from Iran. SCIRI wanted to keep their Islamist tendencies in a nationalist way, where entrenched ties to Iran and subscription to its transnationalist ideology was an obstacle.[532] On the other hand, the armed Badr Organization distanced itself from ISCI, retained its pro-Iran stance, and became the most powerful pro-Iranian armed Shia organization within Iraq.[533]

The ideological and political transformation of Iran's then most trusted Shia ally was telling about the reality and the future of Shia revival in the region: The so-called Shia revival was not an ideologically and politically monotonous phenomenon. To the contrary, the Shia revival was a rather diversified project, with highly diversified opinions on critical issues including the role of the Shia *marjaiyya* in Iraqi politics, the confusion over allegiance to Iraqi nationalism and sectarian identity, and the type of the political future the Shias were envisioning. The political and ideological diversity of the Iraqi Shias created important challenges for Iran at two levels: 1) at the level of Shia *marjaiyya,* where multiple *marjaiyya* positions came face to face politically and theologically, 2) at the level of Shia political parties, where multiple political parties with different political ideologies and visions dominated Shia politics in Iraq.

Iraq has an exceptional position in terms of Shia religious politics. Except for the Islamic Republic, countries with sizeable Shia populations such as Afghanistan, Lebanon, United Arab Emirates, and Pakistan do not have learning *hawzas* and *marjaiyya,* but Iraq has Najaf and Karbala religious *hawzas* and a powerful Shia *marjaiyya*.[534] The Najaf *hawza* and the Shia *marja* was exposed to strict state pressure under the Baathist regime.[535] During this time, the Qom *hawza* of Iran emerged as the center of Islamic Revolution and continued to be a well-known religious learning center internationally. In

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[532] Joseph Felter and Brian Fishman, 'Iranian Strategy in Iraq: Politics and 'Other Means,' *Combating Terrorism Center at West Point*, *Occasional Paper Series*, October 13, 2008, p. 27, https://ctc.usma.edu/app/uploads/2010/06/Iranian-Strategy-in-Iraq.pdf.

[533] 'Badr Organization of Reconstruction and Development,' http://web.stanford.edu/group/mappingmilitants/cgi-bin/groups/view/435.

[534] Interview with Majidyar.

[535] Mahdi Khalaji, 'The Last Marja: Sistani and the End of Religious Authority in Shiism,' *The Washington Institute for Near East Policy, Policy Focus* 59, September 2006, p. 3, https://www.washingtoninstitute.org/uploads/Documents/pubs/PolicyFocus59final.pdf.

the Islamic Republic's political tradition, both reformist and conservative circles come from the city of Qom.[536] The city of Qom is a multinational and international city attracting learning Muslims from all around the world such as Bangladesh, Afghanistan, Iraq, Turkey, China, Saudi Arabia convene for religious education.[537] The Shia revival after 2003 re-shifted the clerical balances to the advantage of the Iraqi *marjaiyya*. Grand Ayatollah Ali Sistani of Najaf, the successor of the famous Iraqi Shia *marja* Abu al-Qasim al-Khoei, emerged as the most powerful *marja* not only of Iraq, but also of the greater Shia world. In post-Saddam Iraq, he acted as the representative of the Iraqi Shia communities, he propagated for electoral politics in Iraq, and became a diplomatic reference point both for the USA and Iran. According to Mahdi Khalaji Ayatollah Sistani's international popularity comes first from his predecessor and mentor Al-Khoei's religious networks, which he could use as a 'symbolic capital,' source of 'prestige,' and 'social influence.'[538] Secondly, his popularity as an esteemed source of emulation gained him economic power. As Khalaji emphasizes, Ayatollah Sistani is the richest *marja* across the Shia, he uses the *hawza*'s revenues and religious taxes to fund seminary students and clerics with higher salaries than any other *marja*, and thus increases his religious network, social influence and prestige as a *marja* among the Shias, and his number of followers.[539]

During the field research to Tehran, several interviewees emphasized the fact that Sistani's rise as a powerful *marja* across the Shia world besides the Qom *hawza* generated multiple rival *marja* positions in the Shia world. For one thing, Ayatollah Sistani is theologically most respected and the most followed Shia *marja*. As Majidyar states, in countries such as 'UAE, Jordan, Saudi Arabia, which has sizable Shias populations of 3 million people, you see that most of them have their *marjaiyy*a in Iraq. They follow Sistani, not Ayatollah Khamenei.'[540] Even in Iran, in his interview, Malaek emphasized that 'The Shia *marjaiyya* in Iraq is more popular than the *marjaiyya* in Iran. Iranians who

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[536] Interviewee 4, expert on Iranian foreign policy at CSR and professor of international relations at Shahid Beheshti University, Tehran, Iran. Interview 2 with the author, conducted on September 13, 2016 at Regional Studies Institute, Shahid Beheshti University, Tehran, Iran.

[537] Ibid.

[538] Khalaji, 'The Last Marja,' p. 9, https://www.washingtoninstitute.org/uploads/Documents/pubs/PolicyFocus59final.pdf

[539] Ibid.

[540] Interview with Majidyar.

follow Sistani are 60 % more' than the Iraqis who follow the *marjaiyya* in Qom.[541] For another, Interviewee 4 argues that the *marjas* in Najaf and Qom differed extensively in terms of the role of Shia clerics in politics.[542] The difference is manifested in the distinction between the Najafi tradition of 'quietism' in political affairs and the Qomi tradition of political 'activism,' or clerical involvement in politics.[543] Imam Khomeini's *velayet-e faqih* stands at the center of this distinction. The Iranian clerical rule since 1979 is based on *velayet-e faqih,* which has institutionalized the clerical role in politics and the legitimacy of their political activism. *Velayet-e faqih* is thus the Iranian brand of Shia political activism and a governmental model of revolutionary political Islam to be exported to Shia popular movements across the region. The Iranian regime could export *velayet-e faqih* as a political ideology to the Lebanese Hezbollah, however it failed to be materialized as an Islamic governmental model in the multi-religious Lebanese socio-political scene. A similar situation is observable in the multi-ethnic, multi-religious, and multi-sectarian Iraqi politics, which complicates the adoption of *velayet-e faqih.* This handicap is recognized by the Iranian experts interviewed on Shia political activism. In this context, Majidyar argues, '[There are] different religious definition of what the Shiite leaders' role in politics is. That is very different in Najaf. […] this *velayet-e faqih* is just a new concept and *velayet-e faqih* has had very limited followers, limited acceptance inside of Iraq, especially in the religious cities like Karbala and Najaf. So, there is always a tension.'[544]

Ayatollah Sistani of Najaf subscribes to the traditional quietist school of Najaf. As Interviewee 6, an Iranian professor of international relations, pointed out, he preferred the political isolation of the Najafi *marja*.[545] However, the weakness of the Iraqi state in the post-Saddam period increased the political influence of Ayatollah Sistani as well as that of the Najafi *hawza*. According to Interviewee 4, the weakness of the Iraqi state has determined the course of *hawza*-state relations in Iraq, where 'In Iraq there is no modern

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[541] Interview with Malaek.

[542] Interview 2 with Interviewee 4.

[543] Ibid.

[544] Interview Majidyar.

[545] Interviewee 6, professor of international relations at Shahid Beheshti University, Tehran, Iran. Interview with the author, conducted on September 13, 2016 at Regional Studies Institute, Shahid Beheshti University, Tehran, Iran.

concept of a state entity that has the legitimate use of force. This type of state does not exist in Iraq. For that reason, the *hawza* in Iraq is very different from Qom. There is no conflict between the Qom *hawza* and the Islamic regime in Iran. But in Iraq, the state is very weak, the *hawza* is powerful.'[546] Under such circumstances, Ayatollah Sistani's political salience can be summarized as his capacity to unite the Iraqi Shias for political power. According to Interviewee 9, a Turkish diplomat in Erbil, '[The Iraqi] *marja* provides the unity to Shias that the Sunnis do not enjoy in Iraq.'[547] One priority for Ayatollah Sistani in Iraqi politics is the political unity of the Shias and the continuation of the Shia state in Iraq.[548] This point is shared by Interviewee 7, a professor of international relations, who states that amid the political multivocality of the Iraqi Shias in electoral politics, 'Ayatollah Sistani wants to be a peaceful balancer in Iraq, not a base for political action.'[549] A second priority for Ayatollah Sistani, which indeed pushed him to greater political engagement, was the security of the Shia populations and the Shia *hawzas* against the emerging ISIL threat. As will be discussed in the coming sections in detail, Ayatollah Sistani issued a *fatwa* for the mobilization of all Iraqis for the defense of the Shias and the Shia holy sites, which lead to the establishment of an umbrella organization encompassing various Shia militias under the Hashd al-Shaabi, the Iraqi Popular Mobilization Forces. In short, the Shia revival in Iraq generated two *marjaiyya* in Iraq and Iran, which rivalled to each other in terms of theological influence and diverged from one another on the clerical engagement in politics. As such, the Shia revival in the Iraqi *hawzas* would not necessarily mean adopting the Iranian Shia political model for Iraq on the part of the Iraqi *marja*. This also would not mean greater political influence by the Islamic Republic on Najafi *hawz*a. Malaek reiterated this point;

> 'The Iranian politics, security, religious leadership will not do anything in Iraq, if Sistani is against that. This is the case in Lebanon too, Iran will not do anything in Lebanon, if Hezbollah's Fadlallah does not want anything. So, Iran is the puppet of Sistani and Fadlallah in certain issues, for example demonstrations. […] So, Iran and Iraq cannot look at Sistani as a political

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[546] Interview 2 with Interviewee 4.

[547] Interviewee 9, Turkish diplomat in Erbil, Iraq. Discussion with the author on May 21, 2017 on Skype.

[548] Interview 2 with Interviewee 4.

[549] Interviewee 7, professor of international relations at Shahid Beheshti University, Tehran, Iran. Interview with the author conducted on September 13, 2016 at Regional Studies Institute, Shahid Beheshti University, Tehran, Iran.

instrument. He is independent of the government. Clergies with less influence can be used, but Iran cannot use grand ayatollahs.'[550]

The multivocality of Shia politics was proved at the level of Shia political parties as well. As early as 2005, Iraq had two more Shia political parties in addition to SCIRI and Badr: the Islamic Dawa Party known for Nouri al-Maliki who served as the prime minister of Iraq, and the Iraqi nationalist block led by Moqtada al-Sadr of the famous clerical Sadr family. The Islamic Dawa Party was established as far back as 1957 by two established Iraqi Shia clerics - Mohammad Baqir al-Sadr and Mahdi al-Hakim.[551] The party was thus rooted in the Shia *ulama,* where al-Hakim and al-Sadr represent the political and economic grievances of the Shia *ulama* and community in Iraq. In the later decades, the Dawa Party faced a severe crackdown by the Baath regime, and as a result, some of its members moved to Damascus to open up Dawa offices in Damascus and some others went to Lebanon and joined the AMAL movement.[552] Despite Mohammad Baqir al-Sadr's original vision of activist Islamist politics which called for an Islamist rule by a community of Shia clerics, the party did not subscribe to Islamic Republic's *velayet-e faqih* and today can best be described as a Shia political party functioning in a multi-ethnic and multi-religious Iraq. A last major Shia political force is the Sadrist movement, led by Muqtada al-Sadr, the son of the revered Shia cleric Ayatollah Mohammad Sadiq al-Sadr. Moqtada al-Sadr adopted an ultra-nationalist and populist political position appealing to the Shiite urban poor in Iraq.[553] His popularity grew also when he adopted a strong anti-American rhetoric and targeted the presence of Coalition Forces through its strong and violent militia - the Mahdi Army.[554] Moqtada al-Sadr's relations with Iran has been especially problematic since 2007 for several reasons. The Mahdi Army's involvement in violent sectarian clashes against the Sunnis and against the Coalition Forces stood at odds with the Iranian ambition to ensure the presence of a peaceful electoral environment where Shia populations could achieve political relevancy via

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[550] Interview with Malaek.

[551] Rodger Shanahan, 'Shia Political Development in Iraq: The Case of the Islamic Dawa Party,' *Third World Quarterly* 25, no. 5 (2004): p. 944-945.

[552] Ibid., p. 948-949.

[553] Eisenstadt, Knights, and Ali, 'Iran's Influence in Iraq,' p. 5, http://www.washingtoninstitute.org/uploads/Documents/pubs/PolicyFocus111.pdf.

[554] Ibid.

elections. The ultra-nationalistic tendencies of Muqtada al-Sadr would bar Iran's influence over Iraq in the post-Saddam period. Finally, the Iranian support for other Shia factions in Iraq including the Dawa Party meant the empowerment of Muqtada al-Sadr's political rivals at home.

Apparently, the Iraqi Shias were not a unified block sharing a unified ideological and political position regarding the post-Saddam Iraq. To the contrary, the Iraqi Shiites were rather diversified in terms of their social classes, geographic distribution within Iraq, ethnic origins, and finally political and ideological orientations. Some of them entertained the idea of a Shia Islamic state in Iraq and looked to the Islamic Republic as a possible source of emulation. Some others were Iraqi Arab nationalists and seemed to be relatively more distanced to transnational political and ideological influences like Iran. For Iran, the plurivocality of Iraqi Shia political factions was a threat against the formation of a unified Shia electoral block against Sunnis in Iraq and hence the Iranian aspiration to have a friendly Shia state as a neighbor. Therefore, the Islamic Republic's priority in the early years of the post-Saddam Iraqi state was to act as a power-broker among all Iraqi Shia factions and maintain a unified electoral block, which was deemed necessary to establish a friendly Shiite-dominated government in a demographically Shiite-dominated Iraq.[555] This strategy succeeded in the 2005 elections, where three major Shia political groups came together under the United Iraqi Alliance (UIA), won the majority of the seats in the interim parliament, and exerted considerable influence over the new constitution making process.[556]

However, the Iranian role as a power-broker soon proved to have limits. The UIA coalition formed under Iranian mediation gradually loosened in the following electoral seasons, new Shia political factions emerged, and rival Shia electoral lists were formed as political alternatives for Shia electorates. Despite such complications reflected on electoral politics, Iran maintained its influence over the Iraqi state. Qasem Soleimani, the IRGC-Qods Force commander better known for his military engagement in Iraq and Syria, was also a major political actor, influenced the appointment of pro-Iranian figures

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[555] Alireza Nader, 'Iran's Role in Iraq: Room for Cooperation,' *RAND Corporation*, 2015, p.5, https://www.rand.org/pubs/perspectives/PE151.html.

[556] Ibid.

from the Shia political parties and groups close to Iran to key governmental and bureaucratic positions.[557] In a similar vein, the Iranian regime also helped promote the chances of specific Shia coalitions in the elections through the provision of political consultants and broadcasting equipment.[558] One final note about these actors is that all of them are coopted by the Iraqi state in one way or another. Some of them such as Dawa and Sadrists run as major political parties with immense popular support, some others such as ISCI have their key figures appointed to key bureaucratic positions, yet others such as the Badr run welfare institutions. The Iranian links to these actors to varying extents, albeit in a complicated manner, show the extensive network-type relationships Iran enjoys within the Iraqi state.

Given the diversified nature of the Shia revival in Iraq both at the level of *marjas* and Shia political parties, the Iranian regime looked cautious about the type of the political system to be established in Iraq. The socio-religious and socio-political diversity of the Iraqi society would not easily allow a *velayet-e faqih* type of clerical rule in Iraq. Arab nationalism among the Iraqis was another factor to act as an obstacle before the Iranian influence.[559] Therefore, the Iranian discourse on the type of political system in Iraq was not the export of the revolution or *velayet-e faqih*, but 'a friendly regime', that would be 'ideologically close to' and in a good cooperative relationship with Iran.[560] Iran kept its connection to the Shia political parties, focused on keeping the integrity and union of the Shias in electoral politics despite their differences, decreased tensions among them where necessary, and provided political advice and technical support.[561] Despite ideological and political disagreements with, Iran continued to be seen as the most important ally by Shia political parties in Iraq. As Interviewee 5 states, 'The Shia political parties believe that they cannot find a country to lean on. Iran is the only real supporter of the Shia in Iraq. Saudi Arabia is the real oppositionist for the Shia, and the USA cannot

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[557] Ibid., p. 6

[558] Hannah Allam, Jonathan S. Landay, and Warren P. Strobel, 'Iranian Outmaneuvers US in Iraq,' *McClatchy DC Bureau*, 2008, accessed May 2016, http://www.mcclatchydc.com/news/nation-world/world/article24482134.html.

[559] Interview with Majidyar.

[560] Interview 2 with Interviewee 2.

[561] Interview with Interviewee 5.

guarantee the power of the Shias in Iraq. They feel it necessary to have better relations with the Iranian regime, as Iran supports them without any condition.'[562]

The year 2011 was an important turning point for Iran both in Iraq and in the region. The withdrawal of US troops from Iraq and the growing political tensions between the Sunnis and the Shias once again ignited the sectarian violence. That same year, the Syrian regime, Iran's only ally in the region, was challenged by popular uprisings and gradually fell into a regional proxy war. The Syrian regime, along with the Lebanese Hezbollah, was the center of an anti-US and anti-Israeli alliance called the 'Axis of Resistance' for Iran. The Islamic Republic was reluctant to lose its only state ally and the center of its regional alliance to the opposition forces inside Syria and the IRGC-Qods Forces had already stepped onto the Syrian territories to keep the Syrian regime intact. The rise of ISIL threat in 2014 across the Iraqi-Syrian territories was a golden opportunity for Iran to press its military presence in the region. The security threat inflicted by ISIL had united the Iranian regime, the Iraqi Shias, Assad, and Lebanese Hezbollah together. The Iranian regime's focus thus shifted from the political sector more to the security sector and engaged in a rapid militia mobilization and security sector institutionalization campaign in both countries. The next section will detail the Iranian – Syrian alliance in this respect.

4.4. Iran's relations with Syria in the post-2011 Period

In early 1980s, the geopolitical situation in the Middle East brought two seemingly incompatible states together under an alliance network that endured to this day. Syria under Assad regime and Iran under the revolutionary Islamic Republic proved to be one of the most enduring allies in the region. As a matter of fact, both were socio-politically and ideologically very different from one other. The Syrian regime was ruled by the Alawite minority regime represented by the Hafez Assad's family - an identity whose legitimacy was an issue of contention both for the Shias and the Sunnis. Iran, on the other hand, had emerged as the first modern Shia state in the region with 1979 Revolution.

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[562] Ibid.

Ideologically, the Syrian regime was Baathist, socialist, and Arab nationalist, while the new Iranian regime was revolutionary and pan-Islamist.[563] Despite such differences, both states worked in close cooperation with one another on regional and domestic issues at a broader level, which has culminated in the Syrian civil war in 2011.

A review of the background conditions for the emergence of this alliance back in 1980s is necessary to understand the current dynamics of bilateral relations. Historical and geopolitical factors shaping the changing the regional balances in late 1970s, the Palestinian-Israeli conflict, and the issue of Lebanon had much to contribute to the emergence of the Syrian-Iranian axis. In 1970s, the Lebanese civil war was the arena of rivalry for regional and international players. The Christian Maronite were supported by both the USA and Israel. The Syrian regime chose to support the Shia populations as well as the PLO, who had deployed themselves on the South of Lebanon, with an attempt to counterbalance the opposing domestic and external forces and to preserve its area of influence. The Lebanese Shias were already discovered by the Iranian-born and Najafi-educated influential Shia cleric Musa al-Sadr in 1970s for political Shiism, who had travelled from Iraq to Lebanon to mobilize the socioeconomically and politically marginalized Shia communities. Within the framework of rising Shia activism, the Shia clerical networks were expanding to the Lebanese Shias and the leftist-Islamist entities opposing the Shah regime in Iran like Mujahedeen-Khalq were trained in the PLO camps. The Syrian regime was moving towards a greater regional isolation on two fronts. First, the Alawite identity of the minority regime in Syria was experiencing a legitimation crisis due to its identity.[564] The Alawite identity crisis is also emphasized by Interviewee 10, where he argued that Assad's secular Baath regime is the source of this crisis for the Alawites in Syria who as a community lack a religious or political order.[565] This legitimation and identity crisis facilitated the rapprochement by Shia clerical figures towards the Alawites. In this context, Musa al-Sadr issued a *fatwa* in 1973 from Lebanon announcing all local Lebanese Shiites as Alawites, thereby giving a green light to the Syrian regime for deeper collaboration and alliance on the domestic situation in

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[563] Goodarzi, *Syria and Iran,* p. 2.

[564] Agha and Khalidi, *Syria and Iran: Rivalry and Cooperation*, p. 3.

[565] Meeting with Interviewee 10.

Lebanon.[566] The Shia-Alawite rapprochement was thus underway, with political ramifications on the relations between the Lebanese Shiites and the Assad regime. Second, Egypt was gradually shifting away from the anti-Israeli camp in the Middle East towards the pro-Western camp, which culminated in the signing of Camp David Accords between Egypt and Israel in 1979.[567] The Syrian regime was concerned by the ambivalence of the Iraqi and Saudi position on Camp David and losing other Arab states to the pro-Western camp on the issue of Palestine. In short, the Syrian regime was moving towards greater isolation among Arabs, having a legitimacy and identity crisis, and was in search of allies by 1979.

The Iranian Revolution in the same year was a game changer in terms of regional balancer, and much so for the Syrian regime. Iran rose from its internal crisis as an Islamic Republic, with a strong revolutionary, Twelver Imamate, pan-Islamist ideology. The new regime had ties to the Palestinian resistance and Lebanese Shiites thanks to the pre-revolutionary clerical and resistant group-level networks. The Islamic Revolution was framed as much an anti-imperialistic movement than as a Shia-religious movement, countering the US penetration in the region and opposing Israel. Given its ideology and network capabilities, Iran thus appeared as an emerging counter-force to US policies in the region and to Israel. This meant the arrival of a new anti-Western and anti-Zionist ally for Syria in the region, which could solve its legitimacy crisis and mitigate its felt isolationism.

Three events in early 1980s sealed the Iran-Syria axis. First, Syria sided with Iran during its war with Iraq in 1980. Both Syria and Iraq were ruled by Arab-nationalist Baath regimes, who were rivalling one another for the title of ideological and political leadership in the region. Each regime was stirring the domestic politics of the other. The Iraqi regime was supporting the Syrian Ikhwan movement by mobilizing the Sunnis from inside Lebanon.[568] For the Syrian regime, Iraq's war with the Islamic Republic was a great distraction on the part of Iraq. Moreover, the Syrian regime would not want to lose its new ally against Israel and the pro-Western Arab camp with the war. Therefore, the Syrian

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[566] Agha and Khalidi, *Syria and Iran: Rivalry and Cooperation*, p. 3.

[567] Ibid., p. 9.

[568] Ibid.

regime supported the Iranian regime during the war, by the transfer of Soviet-provided war materials and political assistance.[569] Second, the Syrian regime benefited from Iranian military assistance during the Israeli invasion of South Lebanon in 1982. The Syrian regime needed the Iranian support for the mobilization of Shia communities against Israel in South Lebanon. Iran, predominantly by the ideological and revolutionary fervor of the fledgling Islamic Republic, saw the Lebanese issue as a moral responsibility. Moreover, Iran was interested in further engagement with the Lebanese Shias, as it saw Lebanon, which had the second largest Shia community outside of Iran after Iraq, as a potential locus for the export its revolution and for building an Iranian base geographically close to Israel.[570] For Iran, the engagement with the Shias would thrust Iran to the forefront in the pro-Palestinian and anti-Zionist politics in the Arab world and possibly export its revolution to Lebanese Shiites. For Syria, the Iranian mobilizational capacity among the Shias were necessary to balance against Israel and the Lebanese regime who was allying with Israel against the existence of PLO on its southern territories.[571]

The 1982 invasion proved to be a defining moment both for the establishment of the Islamic Republic as an anti-systemic actor in the region, and both for Syrian-Iraqi axis, as the Iranian involvement lead to the creation of the Lebanese Hezbollah. Emerging as an anti-US, anti-Zionist, and Shia armed movement with an ideological allegiance to *velayet-e faqih*, Hezbollah would be the leading Iran proxy in the region, get transformed into a welfare organization and political party in Lebanon, and attain an independent army-like status against Israel. Third, when Syria experienced a powerful internal opposition by the mobilization of Sunni constituencies in the city of Hama in 1982, the Iranian regime sided with the Assad regime instead of Ikhwan. This Iranian move in 1982 was counter-intuitive, as the revolutionary Islamist regime, whose political vision included the union of the Islamic *Ummah* regardless of sectarian differences, was expected to support the Ikhwan's political Islamist movement against the secular Baathist

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[569] Bayram Sinkaya, 'Arap Baharı Sürecinde İran'ın Suriye Politikası,' *SETA Analiz*, no 53, April 2012, p. 6, http://file.setav.org/Files/Pdf/20121121171707_seta-arap_bahari_surecinde_iran'in_suriye_politikasi.pdf.

[570] Ibid., p. 6-7, 15.

[571] Ibid., p. 7.

Assad. The 1982 Ikhwan uprisings in Hama was the last step towards the sealing of the official alliance between Syria and Iran.[572]

What tied the knot between the secular Baathist Syrian regime and the revolutionary Islamist Iran was the geopolitical situation developing around the Arab-Israeli conflict and Lebanon in early 1980s. Goodarzi argues that the ideological differences made the alliance endure, as neither state had a reason for claiming 'the mantle of leadership' in their respective political ideologies.[573] On the other hand, Khalaji argues that the 'minority' identity experienced both by Syrian regime as Alawites and by Iran as a Shia Islamist revolutionary regime isolated in the region might have created an identity bonding between Syria and Iran.[574] While geopolitics played an important role in sealing the Iranian-Syrian nexus, the alliance itself deepened the anti-US and anti-Zionist ideological stance exhibited by both countries. Especially the fact that both countries were dubbed as the 'axis of evil' by the USA in 2003 brought them even closer as an anti-US axis.[575] The following Israeli war with Hezbollah in 2006 established Hezbollah as an anti-Zionist, powerful military force specialized in non-conventional and urban warfare in the region. Over time, the Iran-Syria-Hezbollah alliance, with the addition of Palestinian resistance forces, came to be dubbed as an axis counter-balancing the USA, Israel, and the Arab allies committed to preserving the status-quo in the region. In the Iranian foreign policy discourse, the axis of Syria-Hezbollah-Iran and Palestinian resistance groups were called 'the Axis of Resistance.' As Majidyar states, in its original meaning, 'When the Iranians talk about this, they mostly mean the alliance of Iran with state and non-state actors that fight against the USA and Israel. If I use the Iranian term, the global arrogance, which is America, and Zionism which is the Israel.'[576] In short, the Syrian regime, along with the Lebanese Hezbollah, was the member of an emerging block or axis of countries resisting the existing status-quo on the Palestinian-Israeli issue that shaped the pro-Western alliance dynamics among Arabs in the region. This alliance had

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[572] Agha and Khalidi, *Syria and Iran: Rivalry and Cooperation*, p. 13.

[573] Goodarzi, *Syria and Iran,* p. 8-9.

[574] Mahdi Khalaji, 'Iran-Syria Religious Ties,' *Washington Institute*, June 3, 2013, http://www.washingtoninstitute.org/uploads/Documents/opeds/Khalaji_IranPrimer_20130603.pdf.

[575] Sinkaya, 'Arap Baharı Sürecinde İran'ın Suriye Politikası,'p. 7, http://file.setav.org/Files/Pdf/20121121171707_seta-arap_bahari_surecinde_iran'in_suriye_politikasi.pdf.

[576] Interview with Majidyar.

priority status in the minds of Iranian foreign policy elites due to Iran's general sense of isolationism in the region.

The Arab Spring of 2011 and its spread to Syria with a snowball effect was a moment of dilemma for the Islamic Republic. On the one hand, Iran had received the Arab uprisings in Tunisia and Egypt very favorably. Partly illusioned by the popularity or Muslim Brotherhood and other Islamist political parties, the Iranian regime expected the people in the Maghreb to overthrow the authoritarian, pro-Western, Arab regimes in favor of an Islamist regime, thereby finalizing the Islamic movement started with the Iranian Revolution in 1979.[577] In the Iranian view, a similar popular movement was underway in Syria in 2011, where the civilian populations were chanting for reform, free elections, and justice.[578] While part of the protestors were secular civilians, others were rising Islamists, especially the Syrian Ikhwan and Iran was sympathetic to their counterparts in Egypt as Iran expected them to Show an anti-US and anti-Israeli position in the region as well.[579] In a way, the Syrian uprisings thus fitted the Iranian imagination of the Arab Spring. On the other hand, the Syrian case soon proved to be different from the movements in the Maghreb, with possible ramifications for Iran. First, as Malaek states, the foreign mercenaries and global jihadists movements, who could not survive in Kabul and Sudan and were looking for a new capital for basing their operations, arrived in Syria.[580] Iran identified this group of global jihadists with the Salafist movements, who, according to Iran, were financed by Saudi Arabia.[581] The engagement of external forces in Syria signaled to Iran that if there be any change, it would not be led by the local populations.[582] Moreover, the volume of external forces quickly multiplied in Syria when the civil war turned into a proxy war among regional and international players. Secondly,

[577] The Iranian leadership called the Arab uprisings in 2011 'Islamic Awakening' instead of 'Arab Spring,' which will be discussed extensively in the next chapter. See Shahram Chubin, 'Iran and the Arab Spring: Ascendancy Frustrated,' *GRG Gulf Papers*, September 2012, p. 16, https://carnegieendowment.org/files/Iran_and_Arab_Spring_2873.pdf.

[578] Bayram Sinkaya, 'İran-Suriye İlişkileri ve Suriye'de Halk İsyanı,' *Ortadoğu Analiz* 3, no. 33, September 2011, p.45, http://www.orsam.org.tr/files/OA/33/4bayram.pdf.

[579] Chubin, 'Iran and the Arab Spring: Ascendancy Frustrated,' p. 16-17, https://carnegieendowment.org/files/Iran_and_Arab_Spring_2873.pdf.

[580] Interview with Malaek.

[581] Sinkaya, 'İran-Suriye İlişkileri ve Suriye'de Halk İsyan,' p. 45, http://www.orsam.org.tr/files/OA/33/4bayram.pdf.

[582] Interview with Malaek.

the Syrian uprisings was a big threat to the Syria-Iran-Hezbollah axis. As Dehghan states, when proxy forces occupied the Syrian territories, 'the situation in Syria meant a passage to invade Iran as well.'[583] Syria was the central player of the axis, as it was 'the route to reach Lebanon, a safe place for Iran to arrange its meetings with Hezbollah, and transfer weapons.'[584] The survival of the axis trumped the Iranian imagination of the Arab Spring.

According to Interviewee 8, the Iranian leadership began to see the situation in Syria 'as weakening the resistance front.'[585] Given the presence of many players on the Syrian field, Iran thought that the Syrian proxy war was designed and orchestrated by external players including Saudi Arabia, as an attempt to 'weaken the Iranian, Hezbollah, Syrian axis.'[586] Over time, the Iranian regime perceived itself to be the ultimate target of this invasion. He argues that from the Iranian perspective, when the nuclear deal was signed, the lifting of sanctions was on the horizon, Iran was expected to engage in better relations with China and Russia, and become a regional power, suddenly the ISIL threat emerged.[587] To conclude, the situation in Syria gradually grew to be threat to the Iran-Syria-Hezbollah axis and the rising Iranian power in the region in the Iranian eyes, which took precedence over the early imagination of the Arab uprisings.

The Iranian regime's official reaction to Syrian uprisings in the early days of the uprisings reflected the regime's concerns about any foreign intervention into the Syrian affairs. Ramin Mehmanparast, the then foreign ministry's spokesperson, said 'What is happening in Syria is a mischievous act of Westerners, particularly Americans and Zionists. With the help of their media, they are trying to create an artificial protest somewhere or exaggerate a demand of a small group and present it, instead, as the demand and will of the majority.'[588] In a press conference held in Istanbul at the time, then president Mahmoud Ahmadinejad also said 'The government and the people of Syria

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[583] Interview with Dehghan.

[584] Ibid.

[585] Interview with Interviewee 8.

[586] Ibid.

[587] Ibid.

[588] 'Iran calls Syrian protests a Western plot,' *Reuters*, April 12, 2011, http://www.reuters.com/article/2011/04/12/us-syria-iran-idUSTRE73B22V20110412.

have reached a level of maturity to solve their own problem by themselves and there is no need for foreign intervention.'[589] The Iranian regime's official discourse focused on leaving the matter to the local Syrians and the Assad regime. The then Iranian foreign minister Ali Akbar Salehi was inviting Bashar Assad to address the Syrian people's demands through reforms by saying 'If the majority of people in Syria have legitimate demands, it is the duty of the Bashar al-Assad government to respond to those demands as it has done so (thus far) and has fulfilled its promises to improve the situation.'[590] Finally, the Supreme Leader Ayatollah also sharing the official line expressed by the foreign ministry, where he was claiming that the situation in Syria was orchestrated by the USA, Israel, and the Arabs and were serving the American and Israeli interests in the region.[591] Ayatollah Khamenei also assured that Iran would be willing to support any movement that is popular, Islamist, anti-American, and anti-Zionist in nature.[592]

The Iranian Qods-Forces engaged in the Syrian conflict early on, but the Iranian leadership refrained from openly accepting the IRGC presence on the Syrian territory. On the other hand, news was abounding regarding the IRGC presence in Syria. In 2012, 48 Iranian nationals who were pilgrims to Sayyeda Zainab Shrine near Damascus were taken hostage by opposition forces.[593] According to official statements, the abducted Iranian nationals were retired Qods Force members.[594] While the Iranian leadership still refrained from openly acknowledging the IRGC presence, news spread in 2013 regarding the IRGC personnel getting killed while fighting in Syria. A veteran commander of the IRGC called Mohammad Jamali was killed in Syria.[595] It was claimed on several news sites that Jamali

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[589] 'Syrian Problem Needs No Foreign Intervention,' *Ahram Online*, May 10, 2011, http://english.ahram.org.eg/NewsContent/2/8/11792/World/Region/Syrian-problem-needs-no-foreign-intervention-Ahmad.aspx.

[590] 'Iran expects Syria Government to Respond to Public Demands,' *DP News*, July 7, 2011, http://www.dp-news.com/en/detail.aspx?articleid=89316.

[591] Sinkaya, 'Arap Baharı Sürecinde İran'ın Suriye Politikası,' p. 10, http://file.setav.org/Files/Pdf/20121121171707_seta-arap_bahari_surecinde_iran'in_suriye_politikasi.pdf.

[592] Ibid.

[593] '48 Iranians Freed by Syrian Rebels in Exchange for 2000 Prisoners,' *The Telegraph*, January 9, 2013, https://www.telegraph.co.uk/news/worldnews/middleeast/iran/9790323/48-Iranians-freed-by-Syrian-rebels-in-exchange-for-2000-prisoners.html.

[594] Ibid.

[595] 'State Funeral for Iranian Commander Killed in Syria,' *Iran Wire*, November 6, 2013, https://iranwire.com/en/blogs/851/2028.

had volunteered to fight for the defense of the Sayyeda Zainab Shrine against the terrorists near Damascus – one of the most prominent holy Shia sites across the Middle East.[596] At the same time, the IRGC sources were becoming more open about their presence in Syria. Mohammad Ali Jafari, a general of IRGC said 'In comparison with the scale of support the Arab countries have given to opposition groups in Syria and their military presence, we haven't taken any action there,' but that they provided 'intellectual and advisory support and transferred experience.'[597] A bold move came from Mehdi Taeb in 2013, the head of Iranian Supreme Leader Ali Khamenei's Ammar Base think-tank in a speech at a *Basij* meeting in Mashhad, where he stated;

> 'Syria is [Iran's] 35th province, and it is a strategic province for us. If the enemy attacks us and wants to take Syria or Khuzestan, our top priority will be to preserve Syria. By preserving Syria, we will be able to retake Khuzestan – but if we lose Syria, we will not be able to preserve Tehran. […] Syria has an army, but it cannot wage the war within Syria's cities. This is why Iran proposed establishing a Basij force, to conduct the fighting in the cities. [So] the 60,000-strong 'Syrian Basij' was established; it has taken over the fighting in the streets from the army."[598]

The year 2014 ended the Iranian reticence regarding the IRGC activities on the field when the rising ISIL threat legitimized their presence there. The IRGC was now more vocal about its role in the fight against ISIL. The IRGC was framing its involvement both in Iraq and Syria as providing military aid, advice, and strategy in their fight against terrorism. A military aid to the Iranian Supreme Leader Major General Yahya Rahim Safavi said 'We don't conceal that we are present in Syria and Iraq as advisors and give advice to Mr. Bashar al-Assad and Mr. Haider al-Abadi.' in this respect.[599] Regarding the Iranian technical support to both countries, the Commander of the IRGC Aerospace Force Brigadier General Amir Ali Hajizadeh added that Tehran has provided Iraq, Syria, and

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[596] Ibid.

[597] Babak Dehghanpisheh, 'Elite Iranian Unit's Commander Says His Forces Are in Syria,' *The Washington Post*, September 16, 2012, https://www.washingtonpost.com/world/middle_east/elite-iranian-units-commander-says-his-forces-are-in-syria/2012/09/16/431ff096-0028-11e2-b257-e1c2b3548a4a_story.html?utm_term=.6745c16d44ef.

[598] Yossi Mansharof, 'Iranian Official: The Loss of Syria Will Lead to the Loss of Tehran Itself,' *MEMRI*, March 11, 2013, https://www.memri.org/reports/iranian-official-loss-syria-will-lead-loss-tehran-itself-syria-iranian-province-iran-has.

[599] 'Commander: Iran to Supply Iraq, Syria with Further Military Aid,' *Fars News Agency English*, September 22, 2015, http://en.farsnews.com/newstext.aspx?nn=13940631000889.

resistance groups the technological know-how in building missile capabilities.[600] By the summer of 2015, the reports indicated that Iran had 700 IRGC - Qods Force and Ground Forces personnel only in Syria, further supported by 4000 to 5000 advisors and fighters sent by the Lebanese Hezbollah.[601] Iran reportedly an additional 2300 to 2500 IRGC members to Syria in November 2015.[602]

The Iranian military presence was not limited to the provision of military aid and advice though. In a study conducted by Alfoneh and Eisenstadt, the funeral services reports on Iranian IRGC and Lebanese Hezbollah showed that 342 IRGC personnel and 878 Hezbollah fighters were killed in Syria between 2012 and 2016.[603] 'The defense of the holy shrines' discourse has been repeatedly used by Iran to account for IRGC deployment in Syrian and Iraqi territories and those who are killed in the conflicts have been counted as Shia martyrs by Iran's Martyrs' Foundation and public funerals were held with the attendance of political and military figures. A rally was organized in the Iranian city of Mazandaran in May 2016 in support of the volunteers and IRGC forces fighting in Syria and Iraq under the banner 'from Holy Defense to Shrine Defense.'[604] The phrase refers to the Iranian volunteer-based mobilization to defend the new Islamic Republic against Iraq in 1980s and shows how the mobilization is extended for the defense of another holy entity – the holy Shia shrines- outside of Iranian territories.

The involvement of a third actor in the Syrian conflict should also be mentioned in explaining Iran's relations with Syria after 2011: the Lebanese Hezbollah – the third pillar of the Axis of Resistance. As discussed before, the Lebanese Hezbollah's seeds were sown in 1970s with Musa al-Sadr's move to Lebanon to mobilize the Lebanese Shiites. However, the official entity was the outcome of 1982 Israeli-Lebanese War and the revolutionary Iran's efforts to mobilize the more radical elements within the Lebanese Shia movement according to its revolutionary Islamist ideology. Created under the

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[600] Ibid.

[601] Ali Alfoneh and Michael Eisenstadt, 'Iranian Casualties in Syria and the Strategic Logic of Intervention,' *The Washington Institute*, March 11, 2016 http://www.washingtoninstitute.org/policy-analysis/view/iranian-casualties-in-syria-and-the-strategic-logic-of-intervention.

[602] Ibid.

[603] Ibid.

[604] 'From Sacred Defense to Shrine Defense,' *Iran Wire*, May 26, 2016, https://iranwire.com/en/images/3759.

circumstances of war and invasion by Israel, Hezbollah announced an Open Letter in 1985 and branded itself as a 'resistance' force fighting against Israel and US imperialism in the region.[605] The 'resistance' discourse was the manifestation of the Karbala paradigm, but not against as much against the ruler as it was against the invader – Israel.[606] The Iranian influence was reflected on the ideological and operational components of Hezbollah, where the entity defined itself as an internationalist an pan-Islamist entity committed to *velayet-e faqih*.[607] The entity adopted Ayatollah Khomeini's terminology of the 'oppressor' and the 'oppressed,' where the oppressed Shia community in Lebanon.[608] Defensive jihad, i.e. defense of the Islamic *Ummah* against the oppressor, provided the justification for the idea of 'resistance' through asymmetric warfare, martyrdom of the self, and unconventional capabilities against 'a better-funded and better-equipped' aggressor.[609]

With the end of the civil war and the subsequent Taif Agreement in 1989, Hezbollah was gradually transformed into an organizational hybrid. On the one hand, the entity became a legitimate and over time powerful political party representing predominantly the Shia constituencies in Lebanon. On the other hand, the armed wing of Hezbollah did not get dissolved once coopted by Lebanese electoral politics. To the contrary, the armed wing of Hezbollah grew exponentially after the 2006 War with Israel. The entity gained near army-like status after 2006 with extensive Iranian provision of military equipment and missile capabilities.[610] The Hezbollahi military capacity against Israel was seen by many as sidelining the regular Lebanese army in this respect. Hezbollah recognized its dual organizational role both as a legitimate Lebanese political party and as a military force in a new Hezbollah manifesto published in 2009. In this manifesto, Hezbollah defined Lebanon as 'the homeland' and reiterated its position on

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[605] For Hezbollah's 1985 Open Letter, see Dominique Avon et. al, *Hezbollah: A History of the 'Party of God'* (Cambridge: Harvard University Press, 2012), p. 103.

[606] Rola El Husseini, 'Hezbollah and the Axis of Refusal: Hamas, Iran and Syria,' *Third World Quarterly* 31, no. 5 (2010): p. 805.

[607] Benedetta Berti, 'Lebanon,' in *Militancy and Political Violence in Shiism: Trends and Patterns*, ed. Assaf Moghadam (Oxon: Routledge, 2012), p. 117.

[608] Ibid., p. 119.

[609] Ibid., p. 120.

[610] Toby Harnden, 'Iran Admits It Gave Hezbollah Missiles to Strike All Israel,' *The Telegraph*, August 9, 2006, https://www.telegraph.co.uk/news/1525741/Iran-admits-it-gave-Hezbollah-missiles-to-strike-all-Israel.html.

the rightfulness of the Lebanese parliamentary system based on the free representation of all people and communities and on electoral politics.[611] Accordingly, Hezbollah was rebranding itself as a central political actor in Lebanese politic with a tone-down on the original vision of a *velayet-e faqih* type of 'Islamist regime' in Lebanon.[612] However, this did not mean a total refusal of its allegiance to the Islamic Republic and, as a matter of fact, Hezbollah repeated its allegiance to Ayatollah Khomeini and the Iranian regime's official stance in the matters pertaining to the Islamic world.[613] In this respect, Hezbollah's dedication to the Palestinian cause, resistance against the Zionist regime and resistance against the American discourse on the fight against terrorism and the subsequent penetration in the region.[614] In short, the Lebanese Hezbollah had adopted a nationalist position on the politics of Lebanon and an increasingly internationalist position woven around the US and Israeli deeds in the region. By 2009, Hezbollah had established itself as the official carrier of 'resistance brand' in the region along with the Iranian regime.

Given the growing internationalist stance of Hezbollah on the military front, it was not surprising to see Hezbollah elements at the outbreak of the Syrian civil war. As early as 2011, Hezbollah entered Syria under the rhetoric of defending the Lebanese Shias living on the Syrian territory.[615] However, in reality, Hezbollah was already providing training and fighting alongside the Assad forces in 2011 and 2012.[616] On the other hand, the official acknowledgement of Hezbollah's involvement in Lebanon came in 2013, when Nasrallah said 'Syria is the backbone of the resistance, and the support of the resistance. The resistance can- not sit with its hands crossed while its backbone is made vulnerable and its support is being broken, or else we will be stupid.'[617] Nasrallah's

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[611] 'The New Hezbollah Manifesto,' *Lebanon Renaissance*, November 2009, http://www.lebanonrenaissance.org/assets/Uploads/15-The-New-Hezbollah-Manifesto-Nov09.pdf.

[612] Nadim Ladki, 'Hezbollah Cuts Islamist Rhetoric in New Manifesto,' *Reuters*, November 30, 2009, https://www.reuters.com/article/us-lebanon-hezbollah/hezbollah-cuts-islamist-rhetoric-in-new-manifesto-idUSTRE5AT3VK20091130?sp=true.

[613] 'The New Hezbollah Manifesto,' Lebanon Renaissance, http://www.lebanonrenaissance.org/assets/Uploads/15-The-New-Hezbollah-Manifesto-Nov09.pdf.

[614] Ibid.

[615] Marisa Sullivan, 'Hezbollah in Syria,' *Middle East Security Report* 14, April 2014, p. 12, http://www.understandingwar.org/report/hezbollah-syria.

[616] Ibid.

[617] Nadav Pollak, 'The Transformation of Hezbollah by Its Involvement in Syria,' *The Washington Institute for Near*

statement came at the time of a famous Hezbollah in the Syrian town of Qusayr. Resided by a population of mixed religious and sectarian denominations, the town of Qusayr was a logistical corridor for the transfer of opposition militia and weapons between Homs and Lebanon and the flow of Sunni volunteers sympathetic to the opposition forces was from the northeast of Bekaa Valley.[618] Soon the Shias living in Syrian villages accused the opposition forces which they claimed to be Salafist and jihadists for forced displacement.[619] With a 17- day coordinated assault between Hezbollah and the Assad regime, the town of Qusayr was taken from the opposition forces, establishing Hezbollah as a central strategic force tilting the balance in favor of the Assad regime.[620]

Hezbollah's involvement in Syria lies on two calculations. The first one is its commitment to 'the axis of resistance' both for ideological and geopolitical reasons. The second is the centrality of Syria as a corridor of military support flowing from Iran to Lebanon. Therefore, Hezbollah's operations alongside the Assad regime in the following years and Nasrallah's statements reiterated this enduring Hezbollahi commitment to Syria and the resistance axis. In 2015, Nasrallah said 'We are fighting alongside our Syrian brothers, alongside the army and the people and the popular resistance in Damascus and Aleppo and Deir Ezzor and Qusayr and Hasakeh and Idlib. We are present today in many places and we will be present in all the places in Syria that this battle requires.'[621] However, Hezbollah's growing military campaign in Syria created a central dilemma for its further political and ideological evolution. The Lebanese Hezbollah had fought against Israel from inside Lebanon, but it was now fighting against Muslims on the Syrian territory.[622] Before 2013, the Hezbollahi discourse on involvement relied on the protection of fellow Shia populations on the Syrian territory as well as the defense of the

East Policy Research, no. 53, 2014, p. 2,
http://www.washingtoninstitute.org/uploads/Documents/pubs/ResearchNote35-Pollak-2.pdf.

[618] Nicholas Blanford, 'The Battle for Qusayr: How the Syrian Regime and Hezbollah Tipped the Balance,' *Combating Terrorism Center Syria Special Issue* 6, issue 8, 2013, https://ctc.usma.edu/the-battle-for-qusayr-how-the-syrian-regime-and-hizb-allah-tipped-the-balance/.

[619] Ibid.

[620] Ibid.

[621] 'Nasrallah: Hezbollah to Increase Presence in Syria,' *Al Jazeera*, May 25, 2015, https://www.aljazeera.com/news/2015/05/nasrallah-hezbollah-increase-presence-syria-150524233716453.html.

[622] Zafer Kızılkaya, 'Hezbollah's Moral Justification of Its Military Intervention in the Syrian Civil War,' *The Middle East Journal* 71, no. 2 (2017): p. 214.

holy Sayyeda Zainab Shrine.[623] However, with the rise of Salafist-jihadists elements as powerful opposition forces to the Assad regime and more so with ISIL, the intervention discourse shifted towards '*takfirism,*' extremism and radicalism.[624]

While the Iranian regime never acknowledged the term 'Shiite Crescent' introduced by the Jordanian king, 'the axis of resistance' became an official discourse. As Chapter 5 will discuss in more detail, the originally anti-US and anti-Israeli content of the 'axis of resistance' has gradually been transformed with the Syrian civil war and the rise of ISIL in the recent years to contain anti-*takfirism*, anti-Salafism, and anti-jihadi radicalism in the region. Another point was the gradual overlap of the referents of the 'axis of resistance' and the 'Shiite Crescent,' which predominantly resulted from the involvement of pro-Iranian Shia militia in Iraq in the Syrian conflict. An extensive network of trans-border armed mobility took the center stage in the northern axis, where the Iran sent-*Basij* volunteers, pro-Iranian Iraqi Shia militias, and Hezbollah forces moved along the axis and fought alongside the Assad regime against opposition forces in a highly-coordinated manner. 'The axis of resistance' gradually included the pro-Iranian Iraqi Shias as well and the coordinated military strategy among Iran-Lebanon-Syria and the pro-Iranian Iraqi Shias strengthened the alliance. The next sections will discuss the post-2011 trans-border Shia-mobilization and the institutionalization of security institutions in line with the ideological and organizational 'resistance' model in this respect.

Both the Iraqi and Syrian cases have shown in detail that the pre-existing Iranian ties to Shia networks in Iraq and Lebanon have played an important role in facilitating the Iranian penetration into Iraq and Syria. Iraqi Shia political actors like Badr Brigades, Dawa Party, as well as the Lebanese Hezbollah have continued to be Iran's significant allies during this process. Nevertheless, the rise of the religious element in the Middle East has also brought complications for Iran and the most observable complication was the multivocality of Shia politics. The *marjaiyya* in Iraq became a rival to Qom *hawza* in Iran as well as to the political influence of the Islamic Republic over Iraqi Shias. Iraqi nationalism seemed to trump transnationalism for some Shia political actors within Iraq.

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[623] Ibid., p. 216.

[624] Ibid.

Moreover, the Iranian regime also felt challenged when the Syrian Sunni opposition started uprisings against Assad in Syria. Iran's experienced dilemma was between supporting its decades-long authoritarian ally and a rising Sunni Islamist movement. Politically, being the state patron of all Shias in the region and uniting them under a Islamist political system or *Ummah* would be a remote possibility for Iran. Despite the complications on the political front, the rise of Sunni *jihadism* which threatened the human and political security of the Shias in the region saved the Islamic Republic from these dilemmas on the security front. With the rise of Sunni *jihadism* and especially of ISIL on Iraq and Syria, the Iranian regime and IRGC – Qods forces would be patron of Shia armed mobilization in the region, which is the topic of the following section.

4.5. Models of Shia Mobilization Across Iraq and Syria

The year 2011 witnessed a rapid securitization of Shia communities and Shia holy sites in Iraq and Syria upon the rise of Sunni jihadism and ISIL across these territories. Given the multi-actor nature of the Shia revival including the Iranian regime, Ayatollah Sistani of Najaf, and Muqtada al-Sadr were quickly engaged in a process of Shia mobilization against rising Sunni jihadism and ISIL. The proxy war in Syria added the Syrian regime and the Lebanese Hezbollah on the list as well. The borders between what the Iranian regime called as 'the axis of resistance' and 'the Shiite Crescent' gradually got blurred. Despite the involvement of multiple actors in the field, we see that the Iranian regime spearheaded the mobilization process by engaging its own popular mobilization forces, coordinating among multiple Shia power centers over militia support, and laying the institutional infrastructure. The Iranian strategy can thus be divided into three: 1) the Shia mobilization on the Iranian territory, 2) Iranian support for armed mobilization among the Shias, and 3) the creation of paramilitary institutions.

4.5.1. The Involvement of Iranian *Basijis* and Afghan Volunteers

As discussed above, Iran's IRGC – Qods Forces' involvement in both Iraq and Syria was a well-known phenomenon early on. Qods Forces gradually increased their

visibility on the field when the rise of Sunni *jihadism* provided a unique opportunity for the Iranian security forces to legitimize their involvement. What is less-known is the involvement of Iranian *Basijis* in the Syrian conflict as well as the mobilization of Shias on the Iranian territory for fighting in Syria. The *Basij* forces, whose military duties were toned down within the regime in the aftermath of the Holy War and who continued to function as the domestic overseers of the Islamic Republic's revolutionary values in Iran, suddenly regained their military relevance for the Islamic Republic. Moreover, the Iranian *Basijis* were now mobilizing for not for the defense of the Islamic Republic's territorial borders and unlike the Holy War, they were mobilizing for the defense of a Shia shrine in Damascus: the Sayyeda Zainab. As Chapter 5 will discuss in more detail, the Iranian volunteers were being mobilized under the *Basij* organization in Iran under the discourse of 'defending the holy Shia shrines' across the border. In that sense, cross-border mobilization for the defense of Shia holy sites is a novelty for the Iranian regime.

The estimates of how many Iranians volunteered under *Basij* for the defense of Sayyeda Zainab varies, but the news abounds on the notable size of the volunteers. In this respect, and a retired IRGC reportedly said 'The Revolutionary Guard now has [a] problem in managing hundreds of thousands of volunteers who want to be defenders of the oppressed and holy shrines.' [625] Nevertheless, the Islamic Republic has acted quite careful about the cross-border mobilization of the *Basiji* volunteers. The Supreme Leader Ayatollah Khamenei has reportedly ordered the *Basiji* headquarters in Iran to be extremely careful about the selection of volunteers for cross-border operations. Upon the order of the Supreme Leader to choose the best-trained and the most experienced volunteers, as the same IRGC general reported, 'Quds commanders are trying to select the best trained of these people who understand the new tactical concepts for defending the oppressed who are coming under attack.' [626] The same Karbala narratives which mobilized the *Basijis* during the Holy Defense War have mobilized the *Basiji* volunteers for cross-border military operations. In this respect, they are mobilizing defending Imam Hossein's sister's shrine in Syria, and like Imam Hossein, they are self-sacrificing

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[625] Kristin Dailey, 'Iran Has More Volunteers fort he Syrian War Than It Knows What to do With,' *Foreign Policy*, May 12, 2016, https://foreignpolicy.com/2016/05/12/iran-suleimani-basij-irgc-assad-syria/.

[626] Ibid.

themselves for this mission. As such, we see a recurrence of the Karbala theme and Shia identity as a strong mobilization force for Iranian volunteers.

Besides *Basiji* mobilization, another Shia mobilization on the Iranian territory takes place among the Afghan-Iranian Shias. The militia called Liwa Fatimiyyoun is a case in point. Liwa Fatimiyyoun was established by the IRGC by the mobilization of illegal Afghans living in Iran.[627] Majidyar argues that Liwa Fatimiyyoun is the 'largest single militia unit fighting Iran's war in Syria,' and 'even the numbers according to the accounts given by the Iranian officials are much larger than Hezbollah, let alone any single Iraqi Shia group.'[628] Majidyar argues that ideology and identity is one factor driving the Afghan recruits. He argues that some top commanders of this militia have had strong clerical and military ties to the Islamic Republic since the Holy War. In his own words;

'Some of the very top commanders […] are from very well families in Iran, they are very well settled. They lived in Iran for so many decades. Their fathers are studying and teaching in some religious seminaries in Qom, the Holy city of Qom. So, they don't have any other [reason] to just go and join other than ideological reasons. And those people that are close to Iran go back to Iran-Iraq War; some 2000 Afghans were killed at that time. […] And in the 1990s those people fought against Taliban in Afghanistan. So, those people have had these links with the IRGC, with the religious establishment in Qom for almost 3 decades. So, they are the people who are mobilizing the Fatimiyyoun at the first place.'[629]

All in all, Iran's recruitment of Liwa Fatimiyyoun and the *Basiji* mobilization in Iran are a novelty in terms of Iranian popular mobilization. The reason is that this popular mobilization is carried out for trans-border operations and the accompanying religious discourse has a transnational aspect. It should be noted that the inside-Iran mobilization is intended for Syria and defense of the Sayyeda Zainab, whereas the mobilization in Iraq is predominantly carried out by the Iraqi local Shias. The following sections will discuss the Iranian influence over local Shia mobilization in Iraq and Syria.

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[627] Ali Alfoneh, 'Shia Afghan Fighters in Syria,' *Atlantic Council*, April 19, 2017, http://www.atlanticcouncil.org/blogs/syriasource/shia-afghan-fighters-in-syria.

[628] Interview with Majidyar.

[629] Ibid.

4.5.2. Shia Militia Mobilization across Iraq and Syria

The Shia mobilization in Iraq is highly factional as it encompasses several Shia actors with different power positions and visions about the political future of Iraq. In this system, Iran is one actor among others with a capacity to influence Iraqi politics. The Syrian case seems relatively more monotonous, as two Shia patrons of a small minority of Syrian Shias, Iran and the Lebanese Hezbollah, are ideologically and operationally aligned with each other as well as the incumbent Syrian regime. Still, one should look at the overall data on armed Shia groups across Iraq and Syria to get a more detailed insight on the nature of Shia mobilization today.

Table 1 shows that a total of 125 Shia groups that have been active across Iraq and Syria between 2003 and 2015. As Figure 4 shows, 85 % of these groups originated in Iraq, while only 11 % originated in Syria. As Figure 5 indicates, 40 Iraqi-originated groups passed across the border following the outbreak of Syrian civil war, while only 5 groups that originated in Syria became active in Iraq as well. This shows that most Shia mobilization occurred originally in Iraq. This is not surprising given the fact that both demographics and the sectarian political landscape are in favor of the Shiites in Iraq. What is striking though is that around 40 % of the Shia groups in Iraq did not remain limited to the Iraqi territories and they passed across the border to fight in Syria. Part of this cross-border mobilization can be attributed to the Iranian attempt to mobilize Iraqi Shia groups to fight alongside the Assad regime in Syria when the civil war broke out in 2011. Nevertheless, the cross-border mobilization gained an impetus after the rise of ISIL threat in June 2014. Some Iraqi Shia groups in Syria went back to Iraq to defend the Shia dominated territories against ISIL in Iraq. However, additional Iraqi groups were also mobilized to fight against ISIL in Syria. Almost 50 % or 18 of the groups that originated in Iraq and fought also in Syria are a part of the *Hashd al-Shaabi*, i.e. the umbrella organization bringing Shia militias together upon a *fatwa* by the most revered Iraqi cleric Ayatollah Sistani and later integrated into the Iraqi military as a paramilitary unit. This shows that not only the Iraqi militia, but also the institutionalized paramilitary forces of the Iraqi state have fought in Syria, mostly against the ISIL there.

Table 1. Shia Militia in Iraq and Syria[630]

Group Name	Origin	Area of Activity	Political Affiliation	Institutional Affiliation
Abu al-Fadl al-Abbas	Iraq	Iraq, Syria	n/a	n/a
Al-Abbas Fighting Division	Iraq	Iraq	Sistanist	Hashd al-Shaabi
Al-Ghalibun	Syria	Syria	Hezbollah (Syrian)	n/a
Ansar al-Haq	Lebanon and Iraq	Lebanon, Syria	Pro-Iran	n/a
Ansar Allah al-Awfiyya	Iraq	Iraq, Syria	Pro-Iran, Sadrist	Hashd al-Shaabi
Asaib Ahl al-Haqq	Iraq	Iraq, Syria	Pro-Iran	Hashd al-Shaabi
Badr Organization	Iraq	Iraq, Syria	Pro-Iran	Hashd al-Shaabi
Fatiyan al-Aqaida	Iraq	Iraq	Pro-Iran	n/a
Fawj al-Imam al-Fujja	Syria	Syria	Hezbollah (Syrian)	n/a
Faylaq al-Karar	Iraq	Iraq	Hizb al-Minana Party	n/a
Faylaq Waad al-Sadiq	Iraq	Iraq, Syria	Pro-Iran, Hezbollah	Hashd al-Shaabi
Firqat al-Abbas al Qataliya al-Dafa an Quqadisat al-Iraq	Iraq	Iraq	Sistanist	n/a
Fursan Brigade	Iraq	Iraq	Islamic Dawa Party	Hashd al-Shaabi
Harakat al-Abdal	Iraq	Iraq, Syria	Pro-Iran	Hashd al-Shaabi
Harakat al-Shaheed al-Awal	Iraq	Iraq	n/a	n/a
Harakat al-Talia al-Islamiyah	n/a	Syria	Pro-Iran	n/a
Harakat Hezbollah al-Nujaba	Iraq	Iraq, Syria	Pro-Iran	Hashd al-Shaabi
Hezbollah	Lebanon	Syria	Pro-Iran	n/a
Hezbollah al-Ghalibun	Iraq	Iraq	Hezbollah	n/a
Hezbollah al-Sairun	Iraq	Iraq	Sistanist	Hashd al-Shaabi
Hezbollah al-Tha'irun	Iraq	Iraq	Hezbollah	n/a
Hezbollah the Islamic Revolution in Iraq	Iraq	Iraq	Pro-Iran	n/a
Hezbollah the Mujahedeen in Iraq	Iraq	Iraq	ISCI	Hashd al-Shaabi
Hizballah al-Abrar	Iraq	Iraq	Pro-Iran	Hashd al-Shaabi
Jaafari Force / Liwa al-Sayyeda Ruqayya	Syria	Syria	Pro-Iran	NDF
Jaysh al-Mu'ammal	Iraq	Iraq, Syria	Sadrist	n/a
Jaysh al-Mukhtar	Iraq	Iraq	Pro-Iran	n/a
Jaysh al-Wilayat al-Faqih	Iraq	Iraq	Pro-Iran	n/a
Junud al-Mahdi	Syria	Syria	Hezbollah (Syrian)	n/a

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[630] As discussed in the Introduction of this study, the data on Shia armed groups in Iraq and Syria are predominantly taken from a limited number of, yet highly detailed and ambitious, works and datasets collected by individual area researchers, university research institutes, and think-tanks. Most the data used in this research is based on 'Jihad Identifiers Database' collected and made accessible online by the Jihad Intel Group of the Middle East Forum. Another source of data was the Stanford University research project called 'Mapping Militant Organizations.' Yet another study from which the data is retrieved is Phillip Smyth's study on Shia mobilization in Syria. One important note about the data on Shia armed groups is that the conflict both in Iraq and Syria are rather contemporary phenomena with a history of a decade at most. The conflict continues, which makes rapid changes possible including the dissolution of existing groups, the formation of new groups, and the formation and break-ups of alliances. Therefore, constantly updated data is necessary to map the linkages within Shia armed groups networks.

Kataib A'imat al-Baqi'	Iraq	Iraq, Syria	Pro-Iran	n/a
Kataib Ahrar al-Iraq	Iraq	Iraq	Pro-Iran	n/a
Kataib al-Ahad al-Sadiq al-Jadid	Iraq	Iraq	Hezbollah	n/a
Kataib al-Aqila Zainab	Iraq	Iraq, Syria	Pro-Iran	n/a
Kataib al-Difa' al-Muqaddas	Iraq	Iraq	Pro-Iran	n/a
Kataib al-Fatah al-Mubin	Iraq	Iraq	Pro-Iran	n/a
Kataib al-Imam Musa bin Ja'afar	Iraq	Iraq	n/a	n/a
Kataib al-Jaysh al-Fatimi	Iraq	Iraq	Hezbollah	n/a
Kataib al-Muqawama al-Islamiya fi al-Iraq	Iraq	Iraq, Syria	Pro-Iran, Sistanist	n/a
Kataib al-Qiyam al-Husseini	Iraq	Iraq	Pro-Iran	Hashd al-Shaabi
Kataib al-Sabirun	Iraq	Iraq, Syria	Pro-Iran	n/a
Kataib al-Shaheed al-Awal: Quwat al-Buraq	Iraq	Iraq	n/a	Hashd al-Shaabi
Kataib al-Shaheed Zayd al-Tha'ir	Iraq	Iraq	Hezbollah	n/a
Kataib Ansar al-Hijja (2)	Iraq	Iraq	Pro-Iran, Sadrist	Hashd al-Shaabi
Kataib Ansar al-Madhhab	Iraq	Iraq, Syria	Sadrist Qasim al-Ta'i, Sistanist	n/a
Kataib Ansar al-Wilaya	Iraq	Iraq, Syria	n/a	n/a
Kataib Jund Allah al-Ghalibun	Iraq	Iraq	n/a	n/a
Kataib Rayat al-Huda	Iraq	Iraq	Pro-Iran, Hezbollah	n/a
Kataib Thawrat al-Abbas	Iraq	Iraq	Pro-Iran	n/a
Kataib Zaynab al-Kubra	Iraq	Iraq	Pro-Iran	n/a
Kataib Ahrar al-Iraq	Iraq	Iraq	Pro-Iran	Hashd al-Shaabi
Kataib al-Difa al-Muqaddes	Iraq	Iraq, Syria	Pro-Iran	Hashd al-Shaabi
Kataib al-Ghadab	Iraq	Iraq	Islamic Dawa Party	Hashd al-Shaabi
Kataib al-Shahid al-Aval	Iraq	Iraq	n/a	Hashd al-Shaabi
Kataib al-Tayyar al-Risali	Iraq	Iraq, Syria	Pro-Iran	Hashd al-Shaabi
Kataib al-Fateh al-Mubiin	Iraq	Iraq	Pro-Iran	Hashd al-Shaabi
Kataib al-Imam Ali	Iraq	Iraq	Pro-Iran	Hashd al-Shaabi
Kataib Ansar al-Aqeedah	Iraq	Iraq	Sistanist	Hashd al-Shaabi
Kataib Ansar al-Hijja	Iraq	Iraq	Pro-Iran, Islamic Dawa Party	Hashd al-Shaabi
Kataib Hezbollah	Iraq	Iraq, Syria	Pro-Iran	Hashd al-Shaabi
Kataib Imam al-Ghaib	Iraq	Iraq	Pro-Iran	Hashd al-Shaabi
Kataib Imam Hossein	Iraq	Iraq	Pro-Iran	Hashd al-Shaabi
Kataib Jund al-Imam	Iraq	Iraq	Pro-Iran	Hashd al-Shaabi
Kataib Malik al-Ashtar	Iraq	Iraq	Pro-Iran, Sadrist	n/a
Kataib Rijal Allah al-Ghaliboun	Iraq	Iraq	Pro-Iran, Sistanist	n/a
Kataib Rua Allah	Iraq	Iraq	Pro-Iran	Hashd al-Shaabi
Kataib Sayyid al-Shuhada	Iraq	Iraq, Syria	Pro-Iran	Hashd al-Shaabi
Kataib Tayyar al-Rasuli	Iraq	Iraq	Pro-Iran, Sadrist	n/a
Kataib Zahra	Iraq	Iraq, Syria	Pro-Iran	n/a
Khorasan Brigades	Iraq	Iraq, Syria	Pro-Iran	Hashd al-Shaabi
Liwa Abu Fadl al-Abbas (LAFA)	Syria	Syria, Iraq	Pro-Iran, Sadrist	n/a

Liwa Abu Fadl al-Abbas Suqour al-Imam al-Mahdi	Iraq, Syria	Iraq, Syria	Pro-Iran, Sadrist	n/a
Liwa Abu Fadl al-Abbas Tashkil Iraq	Iraq	Iraq	Pro-Iran, Sadrist	Hashd al-Shaabi
Liwa Abu Sadr al-Abbas Khadam al-Sayyida Zaynab	Iraq, Syria	Iraq, Syria	Pro-Iran, Sadrist	n/a
Liwa al-Hamad	Iraq	Iraq, Syria	Pro-Iran, ISCI	n/a
Liwa al-Imam al-Qaim	Iraq	Iraq	Pro-Iran	Hashd al-Shaabi
Liwa al-Karia	Iraq	Iraq	n/a	Hashd al-Shaabi
Liwa al-Muntazar	Iraq	Iraq	Sistanist	Hashd al-Shaabi
Liwa al-Qaim	Iraq	Iraq	n/a	Hashd al-Shaabi
Liwa al-Yum al-Mawud	Iraq	Iraq, Syria	Sadrist	n/a
Liwa al-Baqir	Syria	Syria	Pro-Iran	NDF
Liwa al-Imam al-Hassan al-Mujtaba	Iraq	Iraq, Syria	Pro-Iran	Hashd al-Shaabi
Liwa al-Imam al-Husayn (LIH)	Iraq	Iraq, Syria	Sadrist	n/a
Liwa al-Imam al-Mahdi	Syria	Syria	Pro-Iran, Hezbollah (Syrian)	n/a
Liwa al-Muqawamat Lihamayt al-Muqadisat fi Suriyya w al-Iraq	Iraq	Iraq	Pro-Iran, Sadrist	n/a
Liwa al-Muthandir	Iraq	Iraq	Pro-Iran, ISCI	n/a
Liwa al-Sadiqiin	Iraq	Iraq, Syria	Pro-Iran	Hashd al-Shaabi
Liwa al-Shabaab al-Rasali	Iraq	Iraq	Sadrist	Hashd al-Shaabi
Liwa al-Shahada	Iraq	Iraq	Sistanist	n/a
Liwa Ali al-Akbar	Iraq	Iraq	Sistanist, Imam Hossein Shrine of Karbala	Hashd al-Shaabi
Liwa Ammar Ibn Yasir	Iraq	Iraq, Syria	Pro-Iran, Sadrist	Hashd al-Shaabi
Liwa Ansar al-Marjaiyya	Iraq	Iraq	Sistanist	Hashd al-Shaabi
Liwa Assad Allah al-Ghalib	Syria, Iraq	Syria, Iraq	n/a	n/a
Liwa Assad Allah al-Ghalib (Iraq)	Iraq	Iraq, Syria	Pro-Iran, Sadrist	Hashd al-Shaabi
Liwa Dhulfiqar	Syria	Syria, Iraq	Pro-Iran, Sadrist	n/a
Liwa Fatemiyoun	Afghanistan	Iraq, Syria, Afghanistan	Pro-Iran	n/a
Liwa Fatyan Bani Hashim	Iraq	Iraq	Sistanist	Hashd al-Shaabi
Liwa Kafil Zaynab	Iraq	Iraq, Syria	Pro-Iran	n/a
Liwa Yum al-Qaim	Iraq	Iraq	Pro-Iran	Hashd al-Shaabi
Liwa Zainebiyoun	Syria	Syria	n/a	n/a
Liwa Zhulfiqar	Iraq	Syria	n/a	Hashd al-Shaabi
Manzamat Ansar Allah	Iraq	Iraq, Syria	Pro-Iran, Islamic Dawa Party - Tanzim al-Dakhil	n/a
Martyr Sadr Forces / Qowat al-Shaheed al-Sadr	Iraq	Iraq	Islamic Dawa Party - Tanzim al-Dakhil	Hashd al-Shaabi
Muqawamat Islamiyya Liwa Yewmul Maud	Iraq	Iraq	Pro-Iran	Hashd al-Shaabi
National Ideological Resistance in Syria	Syria	Syria	Pro-Iran	n/a

Qaeda Quwet abu Fadl al-Abbas	Iraq	Iraq	Pro-Iran, Sadrist	n/a
Quwat al-Kadhimain al-Qitaliya	Iraq	Iraq	Kadhimanian Holy Shrine	n/a
Quwat al-Ridha	Syria	Syria	Hezbollah (Syrian)	n/a
Quwat Zaynab al-Kubra	Iraq	Iraq, Syria	Pro-Iran	n/a
Quwet al-Shahid Muhammad Baqir al Sadr	Iraq	Iraq, Syria	Pro-Iran	Hashd al-Shaabi
Rapid Intervention Regiment	Syria	Syria, Iraq	Sadrist	n/a
Rapid Reaction Force (RRF)	Iraq, Syria	Iraq, Syria	Pro-Iran, Sadrist	n/a
Saraya al-Jihad	Iraq	Iraq	Sistanist	Hashd al-Shaabi
Saraya al-Zahra	Iraq	Iraq	Sistanist	Hashd al-Shaabi
Saraya al-Aqideh / Saraya Ansar al-Aqidah	Iraq	Iraq, Syria	Pro-Iran, ISCI	Hashd al-Shaabi
Saraya al-Ashura	Iraq	Iraq	Sistanist, ISCI	Hashd al-Shaabi
Saraya al-Dafa al-Shaabi (KH-SDS)	Iraq	Iraq	Pro-Iran	n/a
Saraya al-Imam	Iraq	Iraq	Pro-Iran	n/a
Saraya al-Jihad	Iraq	Iraq	Pro-Iran, ISCI	Hashd al-Shaabi
Saraya al-Khorasani	Iraq	Iraq, Syria	Pro-Iran	n/a
Saraya al-Salam	Iraq	Iraq, Syria	Sadrist	Hashd al-Shaabi
Saraya Aqa'idiyun	Iraq	Iraq, Syria	n/a	n/a
Saraya Talia al-Khorasani	Syria	Iraq, Syria	Pro-Iran	n/a
Sarayaa Aqadiiyun	Iraq	Iraq	Pro-Iran	n/a
Tashkil al-Hussein al-Tha'ir	Iraq	Iraq	n/a	Hashd al-Shaabi
Tashkilat Asad Baghdad	Iraq	Iraq, Syria	Pro-Iran	n/a

Figure 4: Country Origin of Shia Groups

85%

11%

3%

- Iraq Origin
- Syria Origin
- Iraq and Syria Origin
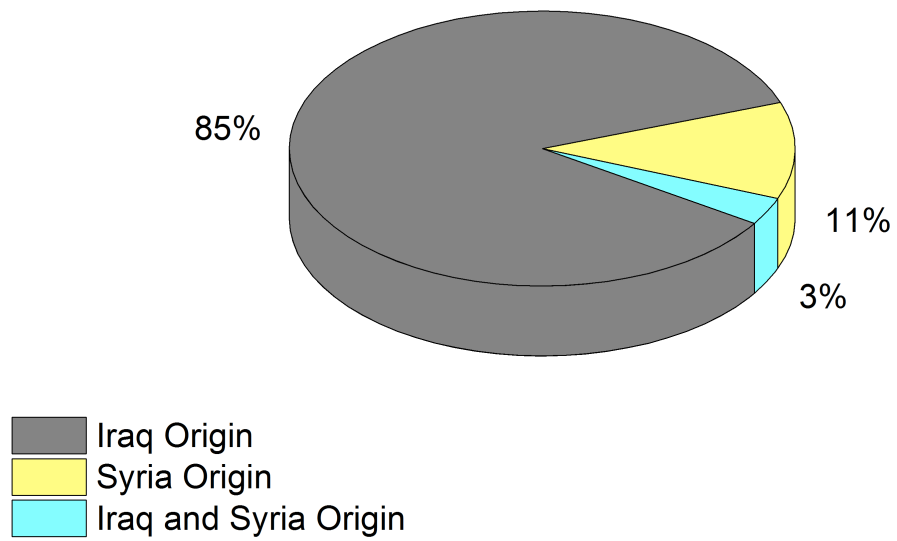
Figure 5: The Area of Activity of Shia Groups
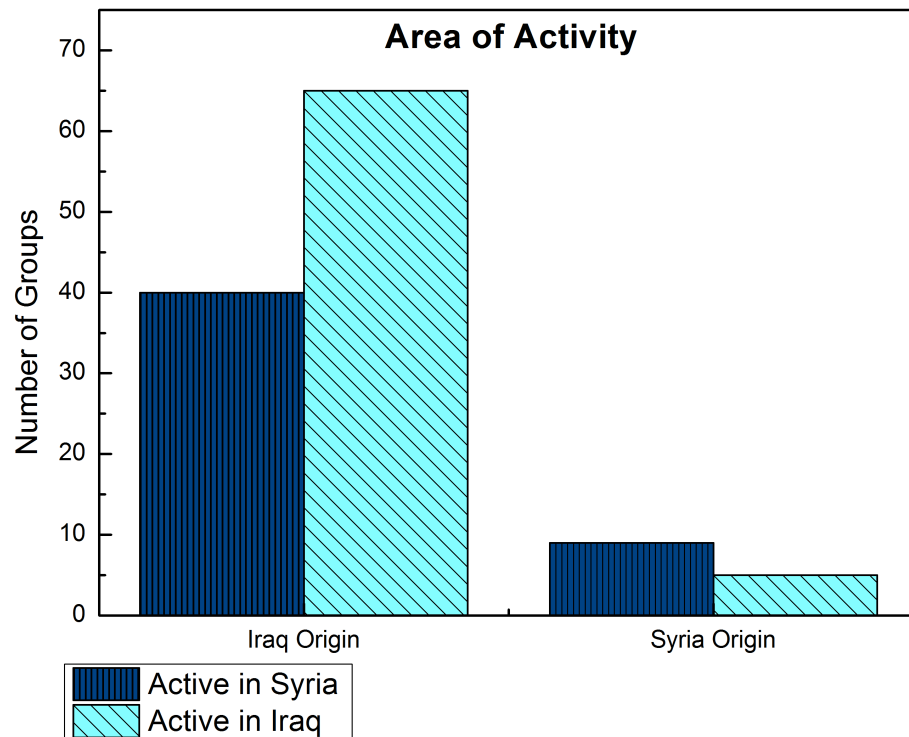
As Table 1 shows, there are three core ideological blocks within the Shia armed mobilization. Some groups in Iraq pay allegiance to Ayatollah Khomeini of Iran and subscribe to *velayet-e faqih* as a political ideology. These groups look to the Islamic Republic as an example for the establishment of a similar political system in their areas of activity. Some of these groups are already defined as 'Iran proxies', as they receive military, political, and ideological training as well as technical support from the IRGC – Qods Forces. Famous Iranian proxies are Badr Brigades, Kataib Hezbollah, Asaib Ahl al-Haq, Harakat al-Nujaba, and Khorasan Brigades, among others. Proxy groups often cooperate with one another during strategic operations, they help establish front organizations to be sent to Syria, and have an upper hand among all Shia groups in terms of men power.

A second group armed Shia militias pays allegiance to the Iraqi nationalist cleric Muqtada al-Sadr. This group of militias are predominantly Iraqi nationalist in outlook and they defend the idea of an independent Iraqi state free of foreign influences including that of Iran. Saraya al-Salam is the official militia of the Sadrist faction today. The ideological differences between Sadr and the Qods Forces as well as the political power struggle inside the post-Saddam Iraqi electoral and bureaucratic politics puts affiliated groups at odds with each other. However, that does not mean that Sadrist groups enter strategic cooperation from time to time with either the Qods Force or pro-Iranian militias. Qods Forces often try to appeal to Sadrist and other Iraqi nationalist factions inside Iraq. Militia formations such as Ansar Allah al-Awfiyya and Liwa Kafil Zaynab are pro-Iranian with attempt to appeal to Sadrists at the same time. Following the dissolution of Muqtada al-Sadr's initial militia formation called the Mahdi Army, Sadrist splinters have come under the command of IRGC-Qods Force and became famous Iran proxies such as Kataib Hezbollah and Asaib Ahl al-Haq. The IRGC-Qods Force has also provided technical and strategic support to some Sadrist groups when the need for operational cooperation arose. Cooperation between two factions happened especially under the circumstances where both parties shared the same goals, such as the defense of the holy shrines. In this respect, the LAFA network of Shia groups fighting in Syria, i.e. groups who are affiliated with Liwa Abu Fadl al-Abbas and fight in support of the Assad Regime and for the defense of the Sayyeda Zainab Shrine near Damascus is composed of fighters that are both Sadrist and pro-Iranian.

A third group of Shia militias are affiliated with Ayatollah Sistani of Iraq. Ayatollah Sistani of Najaf *hawza* is the most revered Shia cleric for the Shia world. He belongs to the theologically quietist Najaf *hawza* and had refrained from political engagement in Iraq. However, the sectarian conflict in Iraq, the rise of ISIL, and Sunni jihadist threats to Shia *hawzas* have pushed him towards a more political activism during the recent years. His most politically active moment was when he released a *fatwa* calling for all Iraqis to arm themselves against ISIL. In response to his *fatwa*, thousands of volunteers came together and formed the pro-Sistani militia under the *Hashd al-Shaabi*.[631] The pro-Sistani militias are Iraqi nationalists and they oppose to the increased Iranian influence over Iraq's political system. Unlike pro-Iranian and Sadrist groups who are affiliated with Shia political parties and factions within Iraqi politics, these groups largely do not prefer political engagement and they plan to dissolve themselves once the ISIL threat is fully eliminated. Saraya al-Ashura, Saraya al-Jihad, Al-Abbas Fighting Division are well-known Sistanist militias to date.

Figure 6: Political Composition of Armed Shia Mobilization

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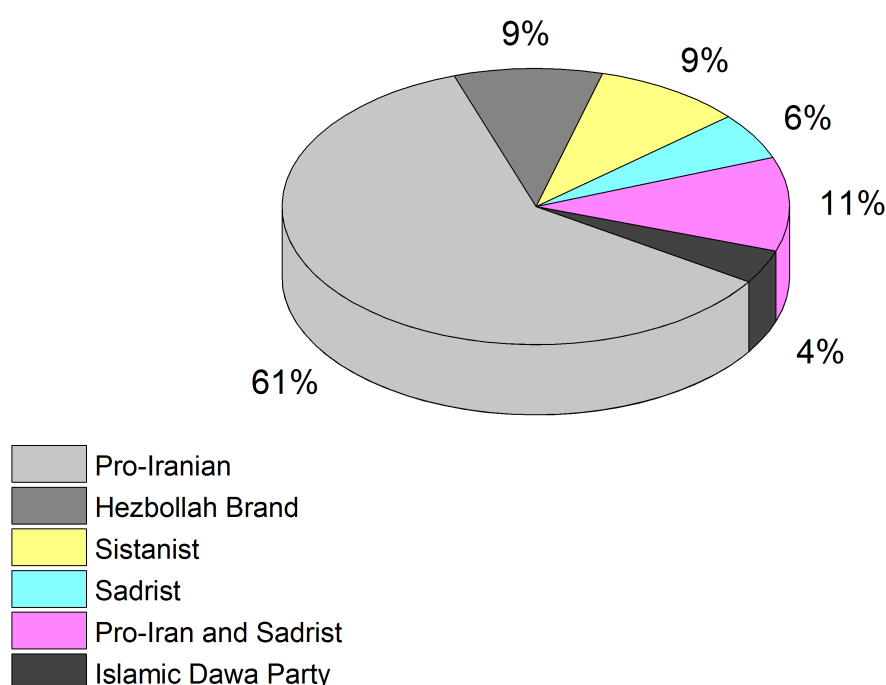
[631] Abdo, *The New Sectarianism,* p. 21.

What does the composition of armed Shia mobilization say about power balances among various Shia factions? As far as the ideological composition of the groups is concerned, a striking result is that 61 % of Shia groups are pro-Iranian and they pay ideological allegiance to Iran's Supreme Leader, while only 6 % are Sadrist and 9 % are Sistanist. This shows that there is a marked Iranian influence over Shia armed mobilization compared to Sadrist and Sistanist factions. As Figure 6 shows, 11 % of the groups are coded as both pro-Iran and Sadrists. A part of these groups is splinter groups that broke away from Muqtada al-Sadr's forces and were later coopted by Iran. Another part of these groups is pro-Iranian with attempt to appeal to the Sadrist factions. Yet another group belongs to LAFA network of Shia militias, i.e. the Iraqi Shia militia network headed by Liwa Abu Fadl al-Abbas Brigades and went to Syria for the defense of the Sayyeda Zainab shrine near Damascus along with Assad's forces. 4 % of militia are affiliated with the Dawa Party, whose Nouri al-Maliki changed the traditional position of the party on having an armed wing with an attempt to increase his political position at home against Muqtada al-Sadr and other factions in Iraq. Given the closer links between Iran and Maliki especially after the latter could preserve his position of premiership despite losing his party's parliamentary monopoly to the Sunni block in 2010 elections, these militias can also be said to augment Iranian dominance within Shia armed mobilization in Iraq. Especially on the Syrian front, an influential pro-Iran ally whose official involvement to the Syrian conflict in 2013 augmented Iranian power is the Lebanese Hezbollah. As the Figure 3 shows, 9 % of the groups pay ideological allegiance to Lebanese Hezbollah. It should be noted that promoting oneself as a Hezbollah brand equals to having allegiance to Iran's Supreme Leader. When the Lebanese Hezbollah, Hezbollah-branded Shia groups, and groups appealing to multiple factions are added, the extent of Iranian influence over armed Shia mobilization far exceeds the actual numbers the table exposes. Compared to Iranian and even Hezbollah's influence on the field, the groups associated with Muqtada al-Sadr and Ayatollah Sistani does not enjoy the same extent of influence. 25 of the 40 Iraqi groups who went to Syria for fighting are pro-Iranian, 5 are Sadrist, and 3 are both pro-Iranian and Sadrist. This also shows the Iranian influence over mobilizing Iraqi Shias for fighting in Syria.

Raw statistics leave us with several conclusions on the nature of Shia mobilization across Iraq and Syria. First, although Shia armed mobilization across Iraq and Syria is characterized by factionalism, the overproportion of pro-Iranian militias show that Iran is

the most influential actor in mobilizing Shias through the activities of IRGC-Qods Force. Second, clerical authority does not automatically translate into political and military influence on its own. Without doubt, Ayatollah Sistani is still the most revered Shia cleric across the Middle East and he has more religious followers compared to Ayatollah Khamenei of Iran or any other cleric in the Middle East. His *fatwa* helped bring together the Shia groups for military defense against ISIL in 2014. However, it was the IRGC military mobilization strategy in the form of training, funds, and strategic advice and its own experience during the Revolution, The Holy Defense War, and export of the revolution period that made a difference. Third, the sectarian conflict situation across Iraq and Syria has strengthened Iran's military influence over the Middle East. The Islamic Republic's military power does not come from conventional capabilities, but from unconventional capabilities. Patronage for Shia militias in two conflict-ridden states put Iran in an advantageous position as a regional and international player. Fourth, besides Iran's strength in unconventional military mobilization, the data informs us on Iran's capacity to socialize these groups in line with its own political orientation and ideological vision. As discussed above, most Shia militias do not plan to dissolve themselves once the sectarian conflict and the ISIL threat is over. A more plausible scenario is that these groups will either be coopted by the security institutions of Iraq and Syria, or they will function as legitimate political parties maintaining their armed wings at the same time, thereby imitating the Hezbollah model. Finally, the pro-Iranian militias have a transnational ideological and operational outlook, which can be expected to strengthen the Axis of Resistance Alliance.

4.5.3. The Creation of Paramilitary Organizations

The support for Shia armed groups is one of Iran's military activities in Iraq and Syria, while the institutionalization of these forces in the form of paramilitary groups and their further integration into the official security institutions is another. The Iraqi *Hashd al-Shaabi*, i.e. 'Popular Mobilization Forces' (PMF) of Iraq and '*Jaysh al-Shaabi*/National Defense Forces' (NDF) of Syria are two military institutions established as paramilitary forces functioning. The Iranian regime has provided direct technical, institutional, and military support for the formation of the PMF in Iraq. The NDF has a precursor, the *Jaysh al-Shaabi*, which were known as local committees made up

predominantly of Syrian Alawites and created by the Assad Regime decades before the civil war. After the eruption of the Syrian civil war, these committees were brought to fight for the Assad regime, in coordination with Iranian and Lebanese Hezbollah's forces.

4.5.3.1. The *Hashd al-Shaabi* / Popular Mobilization Forces (PMF)

When the Islamic State (ISIL) invaded the Iraqi city of Mosul in June 2014, the central Iraqi army, which was institutionally and militarily weakened due to the de-Baathification process of the country, rapidly deserted the city without any committed confrontation. The city's capture took the Iraqis by surprise and the Shia populations doubly so. ISIL was a direct threat to Shia populations, as the group adopted a strong anti-Shia rhetoric and targeted the Shia populated areas of the Iraqi territories. When the ISIL threat approached the Shia shrine areas in cities such as Najaf and Karbala, the esteemed Iraqi Shia cleric Ayatollah Sistani of Najaf issued a *fatwa* on June 13, 2014 calling for arms to all Iraqis including both Sunnis and Shias.[632] Ayatollah Sistani's *fatwa* was an extraordinary move for a politically quietist cleric. Religiously, Ayatollah Sistani's clerical credentials had gained him popularity as 'a *marja* of emulation' among the Shia of the whole region. Politically, he was consistently reluctant to interfere with the political discussions of his country and he subscribed to the traditionally politically quietist Shia theology of Najaf *hawza*. His basic political views on the future of Iraq was the establishment of a constitutional democracy and he was also opposing the importation of *velayet-e faqih* to rule the multi-ethnic and multi-religious Iraqi society.[633] Only one week after the fatwa, on June 20, Sistani's representative Sayyed Ahmad al-Safi issued another statement emphasizing that Sistani's *fatwa* was intended for all Iraqis regardless of their sects and religions.[634] The *marja* was apparently sensitive about the potential sectarianization of this proposed security formation. 60 to 90 thousand volunteers enlisted for arms immediately, a number surpassing far beyond what was expected.[635] Despite al-

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[632] Abdo, *The New Sectarianism*, p. 21.

[633] Joost Hiltermann, 'Iraq: The Clerics and the Militias,' The Crisis Group, October 2015, https://www.crisisgroup.org/middle-east-north-africa/gulf-and-arabian-peninsula/iraq/iraq-clerics-and-militias

[634] Abdo, *The New Sectarianism*, p. 21.

[635] Ibid.

Safi's attempts, a great majority of the volunteers were Shia men though, answering the call by their esteemed Shia *marja* as a religious duty.

Ayatollah Sistani's call for arms was not intended to form a new institution separate from the state. He was rather calling for the men who could take up arms and support Iraq's existing security forces, under a lawful and legitimate Iraqi state authority.[636] This *fatwa* was soon encroached upon by then Prime Minister Nuri al-Maliki. Maliki, as the representative of the Dawa Party was originally against any militia formation in a striking contrast to his other political rivals – Muqtada al-Sadr and ISCI. However, the growing power of Sadr's influence within the Iraqi political system had pushed Maliki towards his own militiafication. As a matter of fact, Maliki was already in connection to Shia 7 militia formations with an attempt to counterbalance Sadr's JAM when Sistani's fatwa was issued, which were Badr, Ashaib Ahl al-Haq, Kataib Hezbollah, Harakat al-Nujaba, Kataib Imam Ali, Kataib Jund al-Imam.[637] He had also become increasingly dependent on Iranian support; as when he lost against the Sunni al-Iraqia in 2010 elections, he still maintained his position as the prime minister with Iran's support.[638] Sistani's *fatwa* was an opportunity for Maliki in 2014 to boost his political power which was lying on a shaky ground due to his unpopular and unsuccessful sectarian policies as well as to maintain his relevance for the Iranians.[639] Finally, a new institution called the *Hashd al-Shaabi* was formed with the initial participation of 42 militias and its number reached 130 thousand volunteers over time.[640] Except for one Christian militia formation, the *Hashd* was predominantly of Shia volunteers. Both the formation of a new institution separate from the existing Iraqi security structures and the predominantly Shia composition of this institution was incompatible with Sistani's original vision.

The formation and the composition of the *Hashd* reflects the factionalization of Shia politics in Iraq. The core militia constituents of the *Hashd* can be divided into three

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[636] See Ranad Mansour, 'The Popular Mobilization Forces and Iraq's Future,' *Carnegie Middle East Center*, April 28, 2017, http://carnegie-mec.org/2017/04/28/popular-mobilization-forces-and-iraq-s-future-pub-68810.

[637] Ibid.

[638] Ibid.

[639] Ece Göksedef, Journalist at TRT World and formerly at Aljazeera Turk. Skype interview with the author, conducted on June 13, 2017.

[640] Ibid.

groups determined by their political ideology, factional supporters, and vision of the *Hashds*' future: The Sistanists, Sadrists, pro-Iranian *Hashds*. The first group of Sistanists are made up of volunteers who took up arms as a religious duty in response to Ayatollah Sistani's fatwa and this group is also known as '*Hashd* Sistani.'[641] The motivation of these groups is the defense of the holy sites in Najaf, Karbala, Samarra. Some notable Sistanist militias are Saraya al-Ataba al Alawiya, Liwa Ali al-Akbar, Saraya al-Ataba, al-Hussainiya, and Saraya al-Ataba al-Abbasiya.[642] ISCI-affiliated groups, which approached the Sistanist view of Iraqi politics over time while distancing themselves further away from Iran after 2007, can also be grouped under the *Hashd* Sistani. Prominent pro-Sistani groups include Saraya al-Jihad, Saraya al-Aqida, and Saraya al-Ashura.[643] The Sistanist groups' vision of the *Hashd al-Shaabi* is the dissolution of the entity after the ISIL is defeated on the Iraqi territories. The Sistanist militias are thus reluctant about future involvement in politics, which bears parallels to Sistani's view.[644] The second group of militias are the Sadrists, the most prominent of them being Saraya al-Salam, the successor of JAM. The Sadrist *Hashd* are believed to have more than a hundred thousand volunteers, who are part of an extensive Sadrist social network structure and they have considerable fighting expertise.[645] The real problem for Sadrist groups is the lack of funding and military equipment due to a lack of Iranian support for Sadrist groups, though. The last group is the pro-Iranian militia and is referred to as the '*Hashd* Soleimani', as they are extensively supported and supervised by IRGC Qods Force and the Iranian commander Qasem Soleimani.[646] These groups are known as institutionally better established, militarily stronger, and more experienced compared to Sadrists and Sistanists thanks to a committed Qods Force support of military materials and training.[647] 6 of the most powerful *Hashd* groups are thus directly Iran-trained: the

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[641] Hiltermann, 'Iraq: The Clerics and the Militias,' https://www.crisisgroup.org/middle-east-north-africa/gulf-and-arabian-peninsula/iraq/iraq-clerics-and-militias.

[642] Mansour, 'The Popular Mobilization Forces and Iraq's Future,' http://carnegie-mec.org/2017/04/28/popular-mobilization-forces-and-iraq-s-future-pub-68810.

[643] Ibid.

[644] Ibid.

[645] Ibid.

[646] Hiltermann, 'Iraq: The Clerics and the Miltias,' https://www.crisisgroup.org/middle-east-north-africa/gulf-and-arabian-peninsula/iraq/iraq-clerics-and-militias.

[647] Mansour, 'The Popular Mobilization Forces and Iraq's Future,' http://carnegie-mec.org/2017/04/28/popular-mobilization-forces-and-iraq-s-future-pub-68810.

Badr Brigades, Iran's decades-long Iraqi Shiite ally since the war with Iraq; Kataib Hezbollah, established by Al Muhandis, an ex-member of Badr Brigades and a commander of the *Hashd al-Shaabi*; Ashaib Ahl al-Haq, established by dissenters from the Sadrist movement and now enjoying very close relations with Iran and Hezbollah; the Harakat al-Nujaba, established by Ashaib Ahl al-Haq as a front organization to send Iraqi fighters to Syria for fighting next to the Assad regime; and Kataib Sayyed al-Shuhada, established by IRGC and Hezbollah first in Syria, from where they moved to Iraq.[648] The pro-Iranian proxies within the *Hashd* have ideological allegiance to Ayatollah Khomeini and Khamenei and subscribe to *velayet-e faqih.* The pro-Iranian groups thus have a more transnationalist vision in contrast to Sadrists and Sistanists, both of whom are Iraqi nationalists. Therefore, several of these pro-Iranian proxies within the *Hashd* fight in Syria to support the 'axis of resistance' or they form front groups for this purpose. Moreover, the *Hashd* Soleimani are closely affiliated with pro-Iran and/or pro-Maliki political parties and they have a considerable influence over the Iraqi electoral politics. In 2014, the Badr organization had gained 22 seats out of 328 within Maliki's 'State of Law' coalition.[649] In a similar vein, Ashaib Ahl al-Haq has also made an application to form its own political party.[650] The relations between Sadrist and pro-Iranian militia within the *Hashd* are generally tense due to Maliki's turn to Iranian proxies for political influence and emerging as a counterbalancing force against Muqtada al-Sadr at home.[651]

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[648] Scott Lucas, 'Iraq Feature: What are the Popular Mobilization Forces,' *EA Worldview*, December 27, 2016, http://eaworldview.com/2016/12/iraq-feature-popular-mobilization-forces/.

[649] Loveday Morris, 'Appointment of Iraq's New Interior Minister Opens Door to Militia and Iranian Influence,' *The Washington Post*, October 18, 2014, https://www.washingtonpost.com/world/appointment-of-iraqs-new-interior-minister-opens-door-to-militia-and-iranian-influence/2014/10/18/f6f2a347-d38c-4743-902a-254a169ca274_story.html?utm_term=.6a02cae4bc3d.

[650] 'Iraqi Militia Registers as Political Party Ahead of Elections,' *The New Arab*, May 26, 2017, https://www.alaraby.co.uk/english/news/2017/5/26/iraqi-militia-registers-as-political-party-ahead-of-elections.

[651] Mansour, 'The Popular Mobilization Forces and Iraq's Future,' http://carnegie-mec.org/2017/04/28/popular-mobilization-forces-and-iraq-s-future-pub-68810.

Figure 7. The Political Composition of the Hashd al-Shaabi
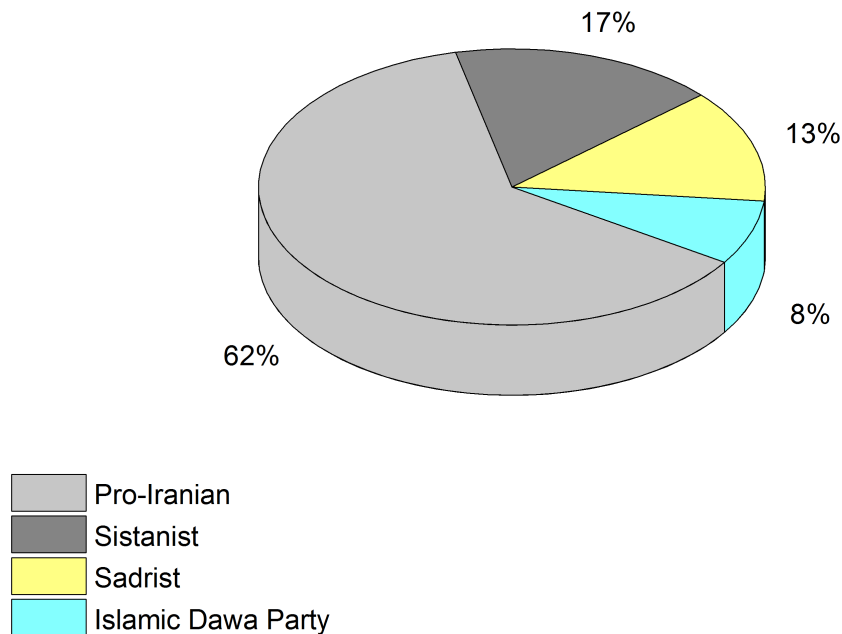
The Iranian influence within the _Hashd al-Shaabi_ is immense, as the most powerful militia groups fighting against ISIL on the field are those trained by IRGC-Qods Force. The Iranian influence over the _Hashd_ is not limited to the institution's composition though. As a matter of fact, the military leadership and the budgetary allocations inform a lot on the Iranian influence over _Hashd_ as well. The Commander in-Chief of the _Hashd_ al-Shaabi is Haider al-Abadi and the institution is governed by a _Hashd_ Commission comprised of some of the important leaders of the Shia militia groups brought under the _Hashd_. In the Commission's 2016 composition, 8 out of 10 Hashd Commission was comprised of commanders and secretary generals of pro-Iranian groups.[652] Important pro-Iranian personalities within the Commission include Hadi Qais al-Khazali, the Secretary General of the Asaib ahl-al-Haq; Akram Abbas al-Kaabi, Secretary General of the movement of Hezbollah al-Nujaba; and Hassan Munis al-Abodi of Kataib of Iraqi Hezbollah among others.[653] The chairman of the _Hashd_ is the National Security Advisor Falih al-Fayyad, a former Dawa Party official who is responsible for the administrative affairs of the _Hashd_.[654] The deputy _Hashd_ Commander Abu Mahdi al-Muhandis and an

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[652] The data on the members of the Hashd Commission can be found under 'Popular Crowd Forces in Iraq (Al-Hashd al-Shaabi) … Origins and Future Survey,' _Rawabat Center_, August 29, 2016, http://rawabetcenter.com/en/?p=1037.

[653] Ibid.

[654] Hassan Abbas, 'The Myth and Reality of Ira's al-Hashd al-Shaabi (Popular Mobilization Forces): A Way

Assistant Commander Hadi al-Amiri, both of whom are famous pro-Iran figures, have a central influence over strategic decision-making. Abu Mahdi al-Muhandis operated alongside the IRGC-Qods Force and the Badr Brigades against the Saddam regime during Iran-Iraq War.[655] He then formed the pro-Iranian Kataib Hezbollah Brigades. Hadi al-Amiri, on the other hand, was a former Minister of Transport serving in years 2010-2014 and a member of the parliament. He is better known for his leadership for the Badr Brigades and close ties to the IRGC-Qods Force. The chairman Falih al-Fayyad is referred to as the 'ra'is', i.e. 'the president' of the *Hashd*, while al-Muhandis and al-Ameri are the 'qa'id', i.e. 'the commander', which highlights the operational predominance of pro-Iranian personalities over the *Hashds*.[656]

The *Hashd al-Shaabi* institution's funding comes directly from the Iraqi state's budget.[657] The funding for pro-Sistani *Hashds* also comes from donations to the religious offices of the holy shrines, as well as from wealthy individuals who contribute to the *Hashd* income via donations to civil society institutions.[658] The budgetary share for *Hashd* as determined by the current Iraqi Prime Minister Haider al-Abadi was 1 million US Dollar in 2015.[659] However, the funding is not allocated equally to all groups operating under the *Hashd* and the issue of budgetary allocation is a source of contention among different *Hashd* factions. Abadi hands in the *Hashd* funding to al-Muhandis as a lump amount, who then decides on the distribution of the money for all militia groups operating under the *Hashd*.[660] Al-Muhandis thus controls the volunteer militia flow and funds flow to the factional *Hashd* militias, where the pro-Iranian groups get an upper

Forward,' *Friedrich Ebert Stiftung*, September 2017, p. 5-6, http://library.fes.de/pdf-files/bueros/amman/13689.pdf.

[655] 'Jamal Jaafar Ibrahimi a.k.a. Abu Mahdi al-Mohandes,' *Counter Extremism Project*, accessed January 2018, https://www.counterextremism.com/extremists/jamal-jaafar-ibrahimi-aka-abu-mahdi-al-mohandes.

[656] 'Security and Politics Mix Inseparably in Hashd Forces,' *Inside Iraqi Politics*, no. 111, July 20, 2015, p. 5, http://www.insideiraqipolitics.com/Files/Inside%20Iraq%20No111.pdf.

[657] Interview with Göksedef.

[658] Marsin Alshamary, 'Tilly Goes to Baghdat: How the War with Daesh Can Create a Shi'a State,' in 'Islam in A Changing Middle East: New Analysis for Shia Politics,' *POMEPS Studies* 28, December 27, p. 46, https://pomeps.org/wp-content/uploads/2017/12/POMEPS_Studies_28_NewAnalysis_Web.pdf.

[659] Ned Parker 'Power Failure in Iraq as Militias Outgun State,' *Reuters*, October 21, 2015, https://www.reuters.com/investigates/special-report/iraq-abadi/.

[660] Mansour, 'The Popular Mobilization Forces and Iraq's Future,' http://carnegie-mec.org/2017/04/28/popular-mobilization-forces-and-iraq-s-future-pub-68810.

hand.[661] The pro-Iranian *Hashd* militias receive more volunteers and military equipment, which increase their status as a more a powerful fighting force within the *Hashd al-Shaabi*. News abound regarding the budgetary contention between pro-Iranian and pro-Sistanist groups as well. Iraq's Ministry of Defense had agreed to approve the salaries of 13,000 recruits out of 14,500; however, al-Muhandis reviewed that amount and agreed to pay the salaries of only 4,800 fighters, thereby showing his unwillingness to fund some pro-Sistani volunteers.[662]

The *Hashd al-Shaabi* has a strong support base within the Iraqi population. The formal Iraqi army is generally seen as a corrupt and inefficient institution by the Iraqis and an army made-up directly of Iraqi people was deemed to be a legitimate supplement to that. This was also reflected in the motto of the *Hashd*, which said 'We are not only fighting against ISIL, but also against corruption.'[663] The sectarian nature of the ISIL threat to the Iraqi Shiites and Ayatollah Sistani's *fatwa* for the defense of the shrines has provided a sacred character to the *Hashd al-Shaabi*. The Shiite leaders have emphasized the homogeneity of the Shiite people in the fight against ISIL and the heroism, sacrifice, and martyrdom of the *Hashd* volunteers –linking them to Shia Karbala- narratives are emphasized.[664] Moreover, social welfare organizations supporting the veterans and the families of *Hashd* martyrs have also been established.

The *Hashd* were incorporated into the Iraqi Security Forces by Prime Minister Haidar al-Abadi on February 22, 2016. The document recognizing the official status of the Hashd as a security force is called the Office Order 91, according to which the *Hashd* 'will be an independent military formation and a part of the Iraqi armed forces, and linked to the general commander of the armed forces.'[665] The *Hashd al-Shaabi* thus gained

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[661] Ibid.

[662] Mansour, 'The Popular Mobilization Forces and Iraq's Future,' http://carnegie-mec.org/2017/04/28/popular-mobilization-forces-and-iraq-s-future-pub-68810.

[663] Interview with Göksedef.

[664] Alshamary, 'Tilly Goes to Baghdat: How the War with Daesh Can Create a Shi'a State,' p. 43-48, https://pomeps.org/wp-content/uploads/2017/12/POMEPS_Studies_28_NewAnalysis_Web.pdf

[665] Bill Roggio and Amir Toumaj, 'Iraq's Prime Minister Establishes Popular Mobilization Forces as a Permanent Independent Military Formation,' *FDD's Long War Journal*, July 28, 2016, http://www.longwarjournal.org/archives/2016/07/iraqs-prime-minister-establishes-popular-mobilization-front-as-a-permanent-independent-military-formation.php.

official status as a permanent and separate security entity integrated into Iraq's security forces. With the Office Order 91, the *Hashd* were thus given the status of paramilitary organization existing side by side and working in coordination with the Iraqi Army. The strong volunteer-based popular mobilization aspect of the *Hashd* as its name 'popular mobilization forces' as well as the religious Shia narratives employed for the mobilization recall the IRGC and *Basij* formations – the institutional extensions of the Iran-Iraq War that shaped the military structure and strategic culture of the Islamic Republic. The strong Iranian influence over the organizational structuring of the Hashd along with Iranian ideological and operational influence on individual Hashd groups strengthens the proposition that the Islamic Republic's Qods Forces have tried to create an institution like the Iranian *Basijis*. As a matter of fact, Iranian sources close to IRGC and *Basijis* speak of the *Hashd al-Shaabi* as an institution modelled on the Iranian *Basijis.* In a message released by Chief of Staff of the Iranian Armed Forces Major General Mohammad Hossein Baqeri in 2016 for the 37th anniversary of the formation of the Iranian *Basijis* said that the Iranian *Basijis* can be an inspiration for the foundation of an Islamic World *Basiji.*[666] The same news article published by Tasnim News Agency, an agency close to IRGC, continued saying that 'Inspired by the Iranian *Basiji,* a similar organization has been established in Iraq, known as the Popular Mobilization Units or *Hashd al-Shaabi.*'[667] In a similar vein, a news site close to the Iranian *Basijis* quoted a spokesperson for the Hashd al-Shaabi saying that the Iraqi *Hashd al-Shaabi* are a continuation of the Iranian *Basijis*, where the Iraqi counterparts relied heavily on the Iranian *Basiji* experience.[668] The same news article continued quoting Nouri al-Maliki saying that the Iraqi government adopted the form and structure of the Iranian *Basijis* when establishing the *Hashd al-Shaabi.*[669]

The *Hashd al-Shaabi* can also be compared to the Lebanese Hezbollah in terms of its current role within the security and electoral sectors of the Lebanese state. As

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[666] 'Formation of Islamic World's Basij Feasible: Iran's Top Officer,' *Tasnim News Agency*, November 23, 2016, https://www.tasnimnews.com/en/news/2016/11/23/1248368/formation-of-islamic-world-s-basij-feasible-iran-s-top-officer.

[667] Ibid.

[668] 'Niyruha-ye Mardomi Iraq Che Kesani Hastand va Cha Mi Khahand? (What is Iran's Popular Forces and What Do They Want?' *Basij Press*, July 11, 2016, accessed April 2017, http://basijpress.ir/fa/news-details/79355/نیروهای-مردمی-عراق-چه-کسانی-هستند-و-چه-می-خواهند؟/.

[669] Ibid.

discussed before, the Lebanese Hezbollah is an Iranian proxy which acts like a paramilitary organization matching the power of the Lebanese army and complementing it with its experience in guerilla and urban warfare. Moreover, the proxy also functions as an Islamist Shia political party within the Lebanese electoral politics and is thus highly integrated into the Lebanese political system. Dehghan, an Iranian journalist interviewed by the author said that the *Hashd al-Shaabi* is Iran's 'another shadow organization' in Iraq resembling the Hezbollah model.[670] Discussions abound whether the *Hashd* will be another IRGC, *Basiji,* Hezbollah within the Iraqi society. The political battles between the pro-Sadr, pro-Sistani, pro-Maliki, and pro-Iran forces will determine the further evolution of this institution. It is currently clear that the *Hashd* as an institution is already integrated into Iraqi Shia politics and security system with its Shia-infused mobilization model, its militia's affiliation with Shia political parties, and its integration into the military bureaucracy of the Iraqi state in 2016.

4.5.3.2.   *Jaysh al-Shaabi* / National Defense Units (NDF)

A similar paramilitary force formation has been underway in Syria following the outbreak of the civil war in 2011. Several concepts have been used to refer to the Syrian version popular mobilization forces such as the *Shaabiha, Jaysh al-Shaabi*, and the National Defense Units (NDF). All three names are used almost interchangeably in the media outlets and correspond to a single phenomenon observed in Syria following the civil war: 'A popular army' made upon a district-level conglomeration of predominantly Alawite volunteers fighting for the Assad regime in coordination with the Syrian Army. Contrary to the attraction the Iraqi *Hashd al-Shaabi* attracted from the policy communities, the NDF remains relatively understudied. Such lack of attention can be attributed to the Syrian Army's relative strength as the central pillar of Assad Regime's security structure. Despite its relative strength, the Syrian security establishment has relied heavily on the use of pro-regime militia and paramilitary units fighting off a diverse set of anti-Assad forces.

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[670] Interview with Dehghan.

The popular mobilization forces in Syria have a longer history compared to the Iraqi *Hashd al-Shaabi*. Assad family's Baath Party formed several paramilitary units after coming to power in 1963 as a counterforce to domestic opposition.[671] A more extensive militia and paramilitary group formation process was underway during the 1980s, where the Baath Party provided arms and training to regime supporters throughout the country against the Muslim Brotherhood uprisings.[672] When the civil conflict erupted in Syria in 2011, the Assad Regime had already had a thirty-years long experience in growing pro-regime militia forces against domestic turmoil and did not hesitate to release their militia forces to the war field. These militia are called the Popular Committees, local volunteers who armed themselves at towns, villages, and district-levels in defense against anti-regime elements.[673] These popular committees are also called the *Jaysh al-Shaabi*, are usually of minority towns, villages, and districts, and made up of the Alawite, Druze, and Christians – the minority populations of Syria.[674] The *Shaabiha*, on the other hand, refers to the criminal smuggling networks and mafia-like organizations emerging in 1970s and 80s and operating with the Assad family.[675] As the Assad family have relied on both formations since 2011 for the defense of their regime, both *Shaabiha* and *Jaysh al-Shaabi* are generally used interchangeably by media outlets. The concept of popular committees was thus already ingrained in the Syrian security logic under the Assad family before the eruption of the civil conflict in 2011 and it was not a consequence of the extreme militiafication of the Syrian war.

When the Syrian Army was worn-out in the face of a myriad of opposition forces in 2013 and was expected to soon lose the game by both regional players and the international community, Syria's two long-standing allies, Iran and the Lebanese Hezbollah stepped in to save the Assad regime. Both the Lebanese Hezbollah and Iran were providing training to pro-Assad units and were fighting alongside Assad since 2012, yet their military activities increased in 2013. Hezbollah and Iran's decision to press for

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[671] Joseph Holliday, 'The Assad Regime From Counterinsurgency to Civil War,' *Middle East Security Report 8,* 2013, p. 11, http://www.understandingwar.org/sites/default/files/TheAssadRegime-web.pdf.

[672] Ibid.

[673] Ibid., p. 16.

[674] Ibid., p. 18.

[675] Hugh Macleod and Annasofie Flamand, 'Inside Syria's Shabiha Death Squads,' *Global Post*, June 15, 2012, https://www.thestar.com/news/world/2012/06/15/inside_syrias_shabiha_death_squads.html.

more military support was rooted in the defense of the 'axis of resistance' alliance. In his May 2013 speech, Hezbollah's leader Hassan Nasrallah called Syria 'the backbone' of the Axis of Resistance that cannot be left to Israel, to the West, and recently to the *takfiri* terrorist forces.[676] Both Iranian IRGC-Qods Force units and the Lebanese Hezbollah supported the Assad regime by direct involvement in the conflict, funding and training the pro-Assad militia, sending Iraqi Shiite militia to fight in Syria, and by creating new militia in Shiite-dominated villages. Ayatollah Khamenei of Iran, Hassan Nasrallah of Hezbollah, Qasem Soleimani of IRGC-Qods Force, and Syrian officers met in Tehran in the spring of 2013 and decided on a closer cooperation and coordination among all the parties fighting for Assad.[677] One consequence of this closer cooperation and coordination decision was grouping the pro-Assad militia and paramilitary forces under a more institutionalized mechanism. As a result, a number of pro-Assad militias and the *Jaysh al-Shaabi*, or local committees committed to defend their towns and villages against anti-regime forces, were restructured and merged under a more institutionalized structure called the National Defense Forces.[678] The NDF was established by a former Iranian *Basiji* deputy commander, Hossein Hamedani.[679] Like *Jaysh al-Shaabi*, a majority of NDF volunteers are Alawites despite the existence of Christian, Druze, and some Sunni groups.[680] Hezbollah has provided significant support for the creation and expansion of NDF, especially training the NDF constituents in Latakia, Homs, Damascus and Aleppo in urban warfare and guerilla tactics.[681]

Whether the NDF was originally modelled on Iranian *Basij* is matter of discussion. As discussed above, the idea of popular mobilization units date back to the rise of Baath Party in Syria and its attempts to protect the regime against domestic opponents. On the other hand, the collaboration by Iranian, Hezbollahi, and Iraqi Shia militia forces on the NDF project has a significant effect on the further evolution of the NDF. The Assad

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[676] Sullivan, 'Hezbollah in Syria,' p. 9, http://www.understandingwar.org/report/hezbollah-syria.

[677] Ibid., p. 14.

[678] Aron Lund, 'Who are the Pro-Assad Militias?' *Carnegie Middle East Center*, March 2, 2015, http://carnegie-mec.org/diwan/59215.

[679] Sullivan, 'Hezbollah in Syria,' p.14, http://www.understandingwar.org/report/hezbollah-syria.

[680] Ibid.

[681] Ibid.

Regime is a highly secularist regime and does not share the Lebanese Hezbollah, Iran, and Iraqi Shia militias' Islamist political ideology. However, all parties are committed to the ideological contours of the 'axis of resistance' and operational necessities to keep the alliance intact. As such, the operational experience of the latter parties in popular mobilization model and the 'axis of resistance' discourse highlight the resemblance between Iranian *Basijis*, *Hashd al-Shaabi*, and NDF as paramilitary state formations. In this respect, Sullivan argues that NDF is intended to resemble the Iranian *Basijis* as a national paramilitary force.[682] Moreover, the IRGC Qods Office in Damascus is the coordination office for the military planning, strategy, and operations which bring together all parties of the 'axis of resistance.'[683] Undoubtedly, the Iranian, Syrian, Hezbollahi and Iraqi Shia militias' military collaboration on the Syrian territory has brought all 'axis of resistance' parties in the northern axis closer. The Iranian regime's discourse about the NDF forces is in parallel to its discourse for *Hashd al-Shaabi*. Commander-in-Chief of the Islamic Republic of Iran's Revolutionary Guard, Hossein Dehghan talks of the IRGC duties and practices as being 'beyond their dear homeland' and a model for the Front of the Islamic Resistance.[684] An article published on Payam-e Enghelab follows the same line of thinking;

> 'The presence of the Quds Force in Iraq and Syria and the support of the Resistance groups has led Iran to define its own security frontiers beyond the boundaries of security. The assistance provided by the Iranian Quds Corps in Syria and Iraq, which played an important role in defeating the region's terrorists, has led to the popularity of this school of thought beyond the borders of the region. Today, I think Iraq and Syria are the commanders of the Republic of as heroes of their own lands. This, the dialogue between popular forces such as Jaysh al-Sha'abi in Syria and Hashd al-Sha'bi in Iraq, which is based on the modeling of our forces and the Iranian army, is an indication of the influence of Iran's authority in neighboring countries.'[685]

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[682] Ibid.

[683] Ibid., p. 13.

[684] 'Vazir Defaa dar Didar Reis Kol Artash Surie: Har Agdam Tecavazkarane be Suriye Moojab Tashdid-e Bohran va Tevasee Jang dar Mantage Khahed Shod (Secretary of Defense meets Chief of Staff of the Syrian army: Any Aggression towards Syria will Exacerbate the Crisis and Lead to War in the Region),' *Sepah News*, May 1, 2016, http://www.sepahnews.com/index.php/sepahnews/item/3622-اقدام-هر-سوریه-ارتش-کل-ستاد-رئیس-دیدار-در-دهقان-سردار-شد-خواهد-منطقه-در-جنگ-توسعه-و-بحران-تشدید-موجب-سوریه-به-تجاوزکارانه.html.

[685] 'Dar Sayeye Egtedar Solh, (in the shadow of Peace Auhority),' *Payam-e Enghelab (Islamic Revolutionary Guard Corps Monthly Magazine)* 9, no.99, June-July, 2017, http://www.sepahnews.com/images/payam94/payam.pdf.

4.6. Conclusion

An overview of Iran's Middle East policy leaves us with several conclusions on the changing nature of security, politics, and order in the Middle East. First, describing Iran's foreign policy as a pendulum that swings between ideology and pragmatism lies on faulty premises. Iran's foreign policy in the Middle East since 2003 shows that both rational and identity-based factors play a role. While the transnational environment is characterized by increased Shia empowerment, the multivocality of Shia politics curbs Iranian leadership on the political front. However, the rise of Sunni jihadism has provided Iran with an opportunity to unite the Shias against a common enemy. This shows that the Iranian political ideology has less influence over the Shias today, compared to the influence of its peculiar popular mobilization model on the security front. Among a plethora of Shia clerical and political actors, the Iranian regime has an upper hand in Shia mobilization through the IRGC – Qods Forces. In this respect, Iranian institutions such as the IRGC and *Basijis* as well as the organizational model have become institutionalized and become a source of 'power' on its own for Iran. Iran's unconventional power challenges our traditional understanding of 'military power' as rooted in states' conventional capabilities. One should thus focus more on unconventional power dynamics to understand the changing security map of the region. Iran's Middle East policy is a valuable test-case in this respect.

Second, religion is a strong mobilizational force in the Middle East today. Nevertheless, religious and/or religious-ideological affiliation is not sufficient on its own to mobilize co-religionists living under a myriad of nation-states. Iran's strong mobilizational capacity over the Shiites across the Middle East comes from its decades-long experience in and commitment to its popular mobilization model accompanied by a careful framing and branding of the Islamic Republic's revolutionary ideology, Karbala narratives, and resistance discourse. Iranian experience with religious politics and religious armed mobilization has been institutionalized over the past forty years of the revolutionary regime's existence. Therefore, religion has become more institutionalized in Iran's security culture and security policy.

Third, for the Islamic Republic's foreign policy, the Axis of Resistance alliance relies as much on institution-building as militia support in war-struck domestic settings. The Iranian policy of the 'export of the revolution' during 1980s has long been understood to be exporting Iran's *velayet-e faqih*-based political ideology to neighboring Muslim countries. Today, Iran carefully refrains from vocalizing *velayet-e faqih* and Shia clerical rule as an alternative political order for the Middle Eastern nations on the path to political transformation, although most of Iran-supported militia pay allegiance to *velayet-e faqih* in discourse. Nevertheless, Iran's activities in the Axis of Resistance show that the exportation of Iranian political system seems to be replaced by another idea today: the exportation of Iran's military system. The experience with Lebanese Hezbollah showed that a group can operate as a paramilitary organization independent of a state's security system on the one hand, and be integrated into the electoral political system of the Lebanese state on the other and can still exert immense influence domestically and transnationally. The creation of paramilitary organizations such as Hashd al-Shaabi in Iraq and NDF in Syria can be considered as part of an Iranian state-building effort in conflict settings. The Iranian officials' emphasis on 'the Iranian *Basiji* model' as emulated by these new institutions strengthens the proposition that the Islamic Republic is exporting its military model to the region through a myriad of activities, if not its political one. The conflict situation within these countries might have generated such an outcome. The perceived security threats emanating from ISIL and other opposition forces have precipitated the military alignment and coordination among Axis of Resistance actors, thereby leading to such institutional build-ups.

Related to the last point, the question remains as to what implications will these new institutions have for the future of Middle East. Are Hashd al-Shaabi and NDF provisional institutions created to address the civil conflict situations in Iraq and Syria and are they expected to get dissolved once the conflict is over? Or are they permanent institutions designed to be an integral part of both the Iraqi and Syrian military and political systems? The IRGC has evolved from a volunteer-based mobilization force at the outset of the Holy Defense War to a highly-institutionalized army in the end. Over decades, the IRGC has further evolved from a mere military to an economic, social, and finally political force inside the regime through its involvement in the post-war reconstruction of the country at all levels. A similar scenario may be a possibility for Iraqi and Syrian politics in the future. As a matter of fact, the overt militia and political party

linkages as is exemplified by Badr and Kataib Hezbollah in Iraq already signals such a possibility for Iraq. Another related question is whether these institutions will have a national or transnational political orientation. Further transnationalization of such institutions both in an ideological and operational sense can be expected to have ramifications for the future of the Axis of Resistance alliance. These issues remain as a question mark for now. The intra-state, inter-state, and state to non-state politics will determine the future of political order in the Middle East.

CHAPTER 5

IRAN'S FOREIGN POLICY DISCOURSES ON THE MIDDLE EAST

5.1. Introduction

The Islamic Republic is quite innovative in devising new discourses. The establishment of a revolutionary Islamic regime does not go unaccompanied with the creation of new political concepts matching the ideals and objectives of the revolution. As discussed before, the amalgamation of Marxist concepts with Islamic ones during the early years of the Revolution such as '*mostezefan,*' '*estekbar,*' and 'holy defense war' exemplifies Iranian ambition in discursively self-determining the Islamic Republic's identity, existence, and experience. Two reasons can account for this discursive inventiveness: 1) the self-declared uniqueness of the Islamic Republic, 2) the Islamization of social sciences in Iran.

Iran branded the 1979 Islamic Revolution of Iran as a third option both to American liberal-modernity and to Soviet communism that had divided the Middle East region in both ideology- and alliance-based terms. The main ideological current that the Islamic Revolution was spearheading was one of Islamism, i.e. the establishment of a unified Islamic civilization across the Middle East, which was propagated as a new solution to the national and transnational problems of the Middle Eastern nations. The idea was that the Middle Eastern states could not address the experienced political and socio-economic problems of constant external intervention into internal affairs such as the exploitation of national resources, externally-arranged coup d'états, and political dependence on superpower patronage by adopting an external political ideology. These

political ideologies, be it Western liberalism and Western-modernity or Marxism, were seen as the root cause of the socio-political problems, backwardness, and dependence in the Middle East. The Islamic Republic believed that if the revolution was a total transformation of the political system and the establishment of a new unique regime and ideology rivals the two main ideological currents of the Cold War years, this had to be accompanied by a new terminology. This is emphasized by the Supreme Leader Ayatollah Khamenei in a speech where he discusses the regime type of the Islamic Republic;

> 'One of the things that is necessary in every popular movement is to create the necessary terminology and systems on the basis of the fundamental principles of the movement. When a new idea - such as the idea of Islamic rule or Islamic Awakening - is proposed, it introduces new concepts into society. Therefore, this movement needs its own terminology. If terms are borrowed from somewhere else, there will be confusion and it will be impossible to fully clarify the idea. We believe in democracy and we also believe in freedom, but we do not believe in liberal democracy. Although the literal meaning of "liberal democracy" is freedom coupled with democracy, the term is commonly associated with certain concepts which we hate. We do not want to use the term for the immaculate, wholesome, righteous and pure concept that we have in mind. Therefore, we need to select a new name for our favorite system: "Islamic democracy" or "Islamic Republic."[686]

The Supreme Leader Ayatollah Khamenei's discussion on the invention of new political terminologies reflects the Iranian ambition of independence. According to this perception, if most of the regional problems are related to dependence to external superpowers and Iran leads the way towards independence via its revolutionary logic, then an equally independent and innovative political terminology had to be adopted. This logic is also reflected on the Islamic Republic's social sciences research and education. Now that Islamism was presented as a third ideological option to American-led liberalism and Soviet-based Marxism, this ideology had to be institutionalized in the scientific and cultural arena through what the Islamic Republic called 'the cultural revolution.'[687] 'The cultural revolution' in Iran refers to a set of education and research policies in Iranian universities to Islamize both the teaching curriculum and the teaching cadres to create an

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[686] Ali Khamenei, 'We believe in Demoracy and Freedom, but We Do Not Believe in Liberal Democracy,' *The Supreme Leader Ayatollah Khamenei Website*, October 15, 2010, http://english.khamenei.ir/news/4843/We-believe-in-democracy-and-freedom-but-we-do-not-believe-in.

[687] Payam Mohseni, 'The Islamic Awakening: Iran's Grand Narrative of the Arab Uprisings,' *Brandeis University Crown Center for Middle East Brief*, 2013, p. 5, https://www.brandeis.edu/crown/publications/meb/MEB71.pdf.

Islamic polity since 1980s.[688] Besides the regime's ambition to raise an Islamist generation of students and researchers, the cultural revolution also aimed at preempting the so-called 'cultural invasion' of the Western thinking, specifically the threat of Westernization and secularization in the Iranian society, which could threaten the survival of the Islamic regime.[689] The Iranian emphasis on devising new terminologies and discourses thus serves two objectives. First, the Islamic Republic frames its position in the wake of national and transnational transformations from its own ideological lens and thus exerts soft power. The Islamic Republic constantly creates, re-creates, and/or retrieves existing discourses to match its political objectives at critical political junctures. Second, the whole process helps institutionalize the Islamic Regime at home through an Islamization of the social science thinking.

Tracking the Islamic Republic's discourses on the transformation of the Middle East since 2003 helps us further disentangle the Islamic Republic's policy formulations towards the region. This chapter will thus be devoted to an analysis of Iran's foreign policy discourses. A survey of the discourses by the Supreme Leader Ayatollah Khamenei, IRGC, *Basij,* as well as other foreign policy elites responding to regional transformations since 2003 are reduced to five core concepts: the Islamic Awakening, the popular mobilization, resistance (axis), takfiri terrorism, and the defense of the holy shrines. The content, referents, and the historical evolution of all concepts will be examined with examples taken from relevant sources. This chapter will thus serve to understand the discursive patterns the Islamic Republic uses in presenting its views on regional developments, devising its current mode of foreign policy activities and strategies, and finally promoting its views and strategies to both domestic and foreign audience. The Islamic Republic's use of discursive tools and its emphasis on ideological framing in foreign policy will be the central components of this chapter. As will be seen, the Islamic Republic heavily relies on its traditional revolutionary Islamist framing. The old revolutionary Islamist discourses are often revoked, albeit with its content and referents adapted to the current historical context. The existing discourses that are transformed are further accompanied by new discourses with religious overtones.

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[688] Ibid.

[689] Ibid., p. 6.

5.2. Islamic Awakening

The Islamic Awakening (*Bidar-e Eslami* in Persian) is one of the most commonly used discourses by Iranian political elites. An Iranian diplomat in Istanbul used the term in a casual conversation on Arab Spring, where he specifically questioned why political analysts use the term 'Arab Spring' for the events of Egypt and Tunisia in 2011. He later added that the Iranian political elites use the term 'Islamic Spring' or 'Islamic Awakening' instead of 'Arab Spring,' as the toppling down of the Egyptian and Tunisian regimes by popular demonstrations and the subsequent empowerment of Islamist political countries in both countries signaled for the Islamic Republic an Islamic Awakening that would sweep the whole region.[690] While the term is used to refer to the Arab Spring today, it has a long history of usage by the Islamic Republic and its content has been reworked and its referents transformed in accordance with the political atmosphere the term is aimed to address.

The term Islamic Awakening originally refers to the rise of a new political ideology and political system in the Middle East as an alternative to Western liberalism and Soviet Marxism. This new ideology is one of Islamism, a socially and politically activist Islamism, expected to address the sociopolitical problems experienced in the region. In the Iranian discourse, the sociopolitical problems that plague the region are the direct result of Western colonialism. The drawing of arbitrary borders dividing the Muslim lands, the successive interventions into the political affairs of Middle Eastern nations by outside powers, the exploitation of natural resources, and the cultural and social problems indicted on the Muslim lands by the globalization of Western liberal and materialist cultural norms and practices, and finally the dependence of Middle Eastern regimes on outside powers and this very system are all considered to create and consolidate the cycle of exploitation and dependence experienced by Middle Eastern nations. The way to break this cycle is to turn inwards, to discover indigenous sources and forces, and to establish an indigenous system not exported from elsewhere. For the Islamic Republic, Islamism is this very indigenous force that would free the Iranian nation from Western colonialism and earn the nation its independence. The Islamic Revolution

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[690] A casual conversation with an Iranian diplomat in Istanbul, June 2015, at the Consulate General of the Islamic Republic of Iran in Istanbul.

of 1979 is considered as the first instance of a popular movement that generated the ideology of politically activist Islam during the 20th century and a revolutionary Islamist government. According to the Islamic Republic, the 1979 Revolution is thus the first instance of Islamic Awakening of a nation-state against colonialism, which has the potential to inspire other nations in the region and lead a collective effort to create a more independent and self-standing Middle East by putting Islam at the center of its ideology and system. In short, the Islamic Awakening is an anti-colonial ideological and political movement that Iran leads as the first revolutionary and anti-colonialist nation in the modern Middle East. The Supreme Leader Ayatollah Khamenei's words on the Islamic Awakening in a pilgrimage message in 1991 is telling on the theme of colonialism:

> The historical background of the Islamic Ummah is something that colonial powers have tried to distort and wipe off the memory of Muslims since the time they entered Asia and Africa. Domination over natural resources of Islamic countries and their manpower and taking the destiny of Muslim nations into their hands have been the goal of colonial powers since the late 18th century. Destroying the pride of Muslims and separating them from their glorious past were the requirements to achieve this goal. In this way, Muslims could be encouraged to abandon their culture and ethical values and to accept western culture and colonial teachings. And this plot proved effective because the domination of corrupt and autocratic governments over Islamic countries had completely prepared the way for the hegemony of colonial powers. And the aggressive norms of western culture and the promotion of all the concepts that were deemed necessary for political and economic domination of colonial powers started flowing like a flood. As a result, within 200 years all Islamic countries became an easy target for western plunderers.'[691]

He further says in a speech made in Ahwaz in 2003 that the element to overcome colonialism is awakening:

> 'Today the awakening and determination of nations is the only thing that can overcome the wild spirit of colonialism. If a nation is vigilant, it knows its rights, it knows its enemy, it knows what the goal of the enemy is and it can stand up against that enemy. Then the power of the arrogant powers and America and all military equipment become ineffective. In such a situation, the arrogant powers cannot do anything. This is the essential thing that the Islamic Revolution relied on since the beginning and the Islamic Republic built its firm foundations on it.'[692]

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[691] 'Leader's Views on the Islamic Awakening,' *The Supreme Leader Ayatollah Khamenei Website*, May 19, 2011, http://english.khamenei.ir/news/1458/Leader-s-View-of-Islamic-Awakening#The_wave_of_Islamic_Awakening.

[692] Ibid.

According to Ayatollah Khamenei, the West regards the Islamic Awakening, along with the Islamic Revolution and the activist Islamist political ideology, as a serious threat. The Islamic Awakening threatens the Western program to steer the Middle Eastern politics and economics according to their own material interests as well as the modern Western liberal ideology which legitimizes this very Western outreach. Ayatollah Khamenei emphasized this point in his speeches, where he says:

'[…] When the Islamic Revolution emerged in Iran and caused that great commotion in the world, a number of outstanding western personalities such as Kissinger, Huntington and Joseph Nye - who are outstanding political personalities in America and Europe - published a series of articles during the early years of the Revolution. These articles and writings warned the western political system and western governments that the Revolution which has been conducted in Iran does not only mean a transfer of power and a change of governments. It means the emergence of a new power in - as they say - the "Middle East" region. […] This new power may not be on a par with western powers in terms of technology and science, but in terms of political influence in areas surrounding this country, it is either better than or as good as western powers and it will challenge them. These outstanding personalities warned western powers about this. This means that, in their opinion, the emergence of this power would put an end to or at least weaken western influence in this sensitive, wealthy and very strategic region which connects three continents to one another and which is the center of oil, wealth and important and necessary minerals. The West has made many efforts to achieve political, economic and - naturally - cultural domination over this region. At that time, these outstanding western personalities guessed that this would happen and of course, they guessed correctly. Today, after the passage of more than three decades, the nightmare which they have been suffering from is gradually coming true. That is to say, a great national and regional power has emerged which has not been defeated by different economic, security, political and psychological pressures. On the contrary, this power has managed to influence regional nations, to establish and promote communal Islamic culture and to help regional nations have a sense of identity.'[693]

For Ayatollah Khamenei, the Islamic Awakening as manifested by the Iranian Revolution was a 'power' on its own, a power that would mobilize the Muslim peoples all around the region, give them a new sense of identity, and tools to fight the influence of Western outreach in the region. Islamism stands at the center of this new power in the

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[693] Ali Khamenei, 'Leader's Speech in Meeting with Participants of the 7th Elite Youth Conference,' *The Supreme Leader Ayatollah Khamenei Website*, October 9, 2013, http://english.khamenei.ir/news/1832/Leader-s-Speech-in-Meeting-with-Participants-of-7th-Elite-Youth.

region. In another speech, Ayatollah Khamenei says that Islamism, and the political system this ideology foresees, is considered to be the real threat by the West:

> 'They interviewed an American politician. The interviewer asked him, "Who is America's enemy?' He replied, "America's enemy is not terrorism, nor is it Muslims. America's enemy is 'Islamism.'' This means that as long as Muslims move forward in an indifferent way and without any Islamic motivation, they do not show any feelings of enmity towards them, but when Islamism, commitment and loyalty to Islam and Islamic governance and the formation of the Islamic civilization step into the arena, then enmities begin. He was right. His enemy is Islamism. This is why you witness that they become very nervous and agitated whenever Islamic Awakening emerges in the world of Islam and they work to destroy and to eradicate it and in certain cases, they succeed.'[694]

Ayatollah Khamenei argues that Islamism is the root cause of the international pressures on Iran since the Islamic Revolution. In his pilgrimage message in 2001, he said that the USA and other Western countries have realized that Muslim nations 'form the core of this awakening and resistance to their plans for global domination' and they use 'economic, political, propaganda, and military tools' to ensure their influence over the region, especially over 'the most vital oil and gas resources – which are essential for their industrial machinery and their material advantage over the rest of humanity.'[695] Moreover, he also added in a ceremony after Imam Khomeini's death in 1989 that these powers also seek to shake the foundations of Islamism and Islamic Awakening 'by imposing wars on [them], broadcasting negative propaganda, imposing sanctions and leveling allegations against [them].'[696] The West is thus considered to employ multiple methods ranging from physical war to psychological war to diminish the power of the Islamic Republic, as the leader of this awakening movement, and to hinder the further empowerment of this new ideological current in the region. The challenging encounter of the Islamic Republic with the West, through the imposed war of 1980-89 and the sanctions to its economy and military program is thus a response to this new power since the revolution.

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[694] Ali Khamenei, 'US Destroyed Some Muslim Countries by Sowing Discord, *The Supreme Leader Ayatollah Khamenei Website*, December 29, 2015, http://english.khamenei.ir/news/2997/U-S-destroyed-some-Muslim-countries-by-sowing-discord.

[695] 'Leader's Views on the Islamic Awakening,' http://english.khamenei.ir/news/1458/Leader-s-View-of-Islamic-Awakening#The_wave_of_Islamic_Awakening.

[696] Ibid.

The Iranian policy option to fight the Western pressures to ensure its colonial outreach on the Middle East is the unification of the Muslims, or the establishment of the Islamic *Ummah*. The Islamic Awakening should not be limited to the Iranian borders; rather, the idea of it should be spread elsewhere. This formed the basis of the Islamic Republic's policy of 'the export of the revolution' between 1979 and 1989. The establishment of the Islamic *Ummah* would necessitate the export of the Islamic Awakening idea and the revolution to other Muslim countries. As a result, the Islamic Republic saw the Islamist movements and groups as the carrier of this Islamic *Ummah* Project and provided support to them both in words and in deeds.

Considering the 1979 Revolution to be the first instance of Islamic Awakening of a nation-state against colonialism that engendered a new power in the region, the Iranian leadership saw the political upheavals of 2011 in Egypt and Tunisia nothing more than the continuation of the anti-colonialist struggle started by Iran in 1979. Like the Iranian Revolution of 1979, the uprisings in Egypt and Tunisia are a response to ages-old domination of the Middle Eastern nations, culture, and political system by the forces of Western colonialism. As was the case with the Iranian Revolution, the real responsibility fell on the shoulders of the authoritarian Arab regimes who allied with the Western powers for their parochial regime security interests and facilitated the Western infiltration that put the Middle Eastern people at a disadvantage in socio-economic, political and cultural terms. In this respect, Ayatollah Khamenei refers to the predominant Western reading of the Arab uprisings of the Middle East that places the analyses only on economic terms as a misreading. While he does not underestimate the significance of economic factors in driving the Egyptian and Tunisian people to the streets, he says that 'the main reason is the feeling of humiliation that has been created among the people of Tunisia and Egypt because of the performance of their rulers.'[697] According to Ayatollah Khamenei, the root of the problem is the dependence of the Egyptian president Mobarek on the Western powers, 'which prevented the economy of Egypt from developing.'[698] Moreover, in Khamenei's discourse, the Western analyses also underestimate the role of Islam as a driving force behind these uprisings. He specifically emphasizes Friday prayers and

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[697] 'Leader Leads Tehran Friday Prayers,' *The Supreme Leader Ayatollah Khamenei Website*, February 5, 2011, http://english.khamenei.ir/news/1407/Leader-Leads-Tehran-Friday-Prayers.

[698] Ibid.

mosques in Egypt as well as the religious slogans chanted during the events.[699] In a similar vein, he also emphasized Ben Ali government's modern-secularist and often anti-religious policies concerning the use of *hijab,* the religious covering for women, in public areas and individual and congregational prayers in public spaces as a cause for the uprisings.[700] The undisputed infiltration of Western modernism at cultural, economic, and sociological levels under authoritarian Arab leaders allied with Western powers is regarded to be the real reason for people's chants for democracy, equality, justice on the Arab street.

The solution to the problems driving the Arabs on the street is putting Islamism at the center of new political discussions, which would lead to transformations. Ayatollah Khamenei says that 'regional developments should pay attention to preserving the pivotal role of Islam' and 'Islamic principles and *Sharia* should be the pivot of things.'[701] This argument is based on the belief that Islam is answer to solutions for many human problems and is a progressive force 'compatible with progress, change, and civilization.'[702] In the Conference on Islamic Awakening organized by Iran in relation to the Arab uprisings in 2012 with the attendance of representatives from 80 countries, Ayatollah Khamenei clarified the specific practical components of Islamic Awakening, where he said 'to speak of Islamic awakening is not to speak of a nebulous and indistinct concept that is amenable to various interpretations.'[703] First of all, if the Arab uprisings are a revolutionary moment, the slogans and principles of the revolution should be set in a solid manner as in all revolutions. As Islamism is the pivotal ideology that will steer the course of the Arab revolutions, then 'the slogans and principles must be refined and brought in line with the foundations and undisputed principles of Islam.'[704]

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[699] Ibid.

[700] Ali Khamenei, 'Leader's Friday Prayer Address,' *The Supreme Leader Ayatollah Khamenei Website*, February 5, 211, http://english.khamenei.ir/news/1417/Leader-s-Friday-Prayer-Address.

[701] Ali Khamenei, 'Leader's Speech to Participants of International Conference on Islamic Awakening,' *The Supreme Leader Ayatollah Khamenei Website*, December 11, 2012, http://english.khamenei.ir/news/1726/Leader-s-Speech-to-Participants-of-International-Conference-on.

[702] Ibid.

[703] Ali Khamenei, 'Leader's Remarks at International Conference on Islamic Awakening, Video and Audio,' *The Supreme Leader Ayatollah Khamenei Website*, September 17, 2011, http://english.khamenei.ir/news/1523/Leader-s-Remarks-at-International-Conference-on-Islamic-Awakening.

[704] Ibid.

Khamenei adds that the principles of Islam are already a source of inspiration for addressing the predominant problems of the Middle Eastern nations today, where he says 'Independence, freedom, justice, refusal to bow to despotism and colonialism, rejection of ethnic, racial, and religious discrimination, and the outright rejection of Zionism, which, today, comprise the pivots of the movements in Islamic countries, are all inspired by Islam and the *Quran*.'[705] Secondly, Islamic Awakening is not an ideological movement without a political end. Rather, the Islamic Awakening is a movement that aims the establishment of an Islamic political system in the end. That system is institutionalized in *velayet-e faqih* in the case of Islamic Republic of Iran and it entertains the idea that the Islamic state is governed by an elected Shia cleric of a high theological rank. *Velayet-e faqih* thus requires the pre-existence of a well-established Islamic clerical system which would generate religio-political rulers. Iran could establish this system due to the existence of Shia clerical *hawza* of Qom as well as the majority of Shia population. However, the Iranian regime was convinced after the leveling down its 'export of the revolution' policy that the specific socio-political context in each country might not be suitable for a very specific political idea like *velayet-e faqih*.

However, this also has not prevented the Islamic Regime's desire to see similar Islamic regimes elsewhere, if not *velayet-e faqih* itself. Therefore, the Islamic Republic never dubbed *velayet-faqih* as an alternative political system to that of Arab authoritarianism during the Arab uprisings, and propagated for electoral Islam or 'Islamic democracy' in its stead. For one thing, at its very core, Iran self-identifies its government system as an 'Islamic democracy' as opposed to the Western 'liberal democracy,' which the Iranian regime associates with a liberal-modern understanding of societal functioning as well as on Western human rights values.[706] Islamic democracy is thus already seen as compatible with the core of the Islamic Republic. For another, a very important demand by the people who participated in the Arab uprisings was 'to have a decisive participation in the management of their countries.'[707] According to Ayatollah Khamenei, 'since they

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[705] Ibid.

[706] Ali Khamenei, 'We Believe in Democracy and Freedom, But We Do Not Believe in Liberal Democracy,' *The Supreme Leader Ayatollah Khamenei Website*, http://english.khamenei.ir/news/4843/We-believe-in-democracy-and-freedom-but-we-do-not-believe-in.

[707] Khamenei, 'Leader's Remarks at International Conference on Islamic Awakening, Video and Audio,' http://english.khamenei.ir/news/1523/Leader-s-Remarks-at-International-Conference-on-Islamic-Awakening.

believe in Islam, their desire is to have a system of Islamic democracy, i.e. the rulers being elected through the vote of the people and the dominant principles and values of the society being based on the Islamic knowledge and *Sharia*.'[708] All in all, the Islamic Awakening referred to a popular revolutionary movement by the Arab nations against their authoritarian Arab leaders and the establishment of an electoral system based on the principles of political Islam at its very basic sense which will be shaped by the specific contextual variables of each nation.

When it comes to the leadership of the region-wide Islamic Awakening movement, the Islamic Republic sees itself as the founder and current leader of the movement. Ayatollah Khamenei says;

> 'A wave of Islamic revival and awakening has swept through the Islamic world, and Muslim nations are expressing a strong desire to return to Islam and practice this lofty religion. This awakening has stemmed from the great Islamic revolution of the Iranian people under the leadership of our late magnanimous Imam. […] The enemies told us not to export our Islamic revolution! We said that revolution could not be exported, since it is not a commodity! However, our Islamic revolution, like the scent of spring flowers that is carried by the breeze, reached every corner of the Islamic world and brought about an Islamic revival in Muslim nations.'[709]

Ayatollah Khamenei argues that the Iranian slogans shouted by the Iranian people on Iranian streets now resonate on the Arab Street throughout the region, which means that they are following the same goals as the Iranian nation and that they 'have joined the Iranian nation as progressive forces, thanks to the determination of their people.'[710] However, Ayatollah Khamenei does not claim that they have led to the Arab uprisings. He rather sees the Iranian Revolution as a model to be emulated by the Arab nations today. As such, he argues that 'it is also illogical to say that the awakening of the Iranian nation and the uproar it has caused over the past three decades has had no effect on the awakening of other nations.'[711] In other words, Iran has the potential to inspire other

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[708] Ibid.

[709] Ali Khamenei, 'Leader's Address to Workers and Teachers,' *The Supreme Leader Ayatollah Khamenei Website*, April 30, 2003, http://english.khamenei.ir/news/130/Leader-s-Address-to-Workers-and-Teachers.

[710] Ali Khamenei, 'Leader's Speech in Meeting with Commanders and Personnel of Islamic Revolutionary Guards Corps,' *The Supreme Leader Ayatollah Khamenei Website*, October 7, 2015, http://english.khamenei.ir/news/1591/Leader-s-Speech-to-Air-Force-Commanders.

[711] Ibid.

nations in the region and to lead a collective effort in creating a more independent and self-standing Middle East by putting Islam at the center of its ideology and system. With its 40 years of experience in Islamic revolutionary state building, Iran is regarded to be a model for other states.[712] In Ayatollah Khamenei's words, if the world of Islam is making 'a historical turn,' 'The Islamic Republic is the manager and director of this great event. Of course, the players are many. The doers, agents and activists in the world of Islam are many, but the manager is the Islamic Republic.'[713]

All in all, in the Islamic Republic's discourse, the Islamic Awakening refers to political Islam as a viable alternative to other political ideologies for solving the socio-economic and political problems experienced by the peoples of the Arab nations living under authoritarian Arab regimes that are allied with the colonialist powers. The Islamic Awakening is building a governing system based on electoral Islamism, i.e. Islamic democracy. According to this discourse, the 1979 Revolution showed that Islamic Awakening is a power that will ultimately change the political order in the region. In this respect, the Islamic Republic is the very 'mother of Islamic awakening and Islamic movement,' which is regarded to have the resources to inform the Middle Eastern nations on ideological and institution-building fronts for accomplished Arab revolutions.[714]

The discourse data shows that the frequency of the term 'Islamic Awakening' gradually decreases in Ayatollah Khamenei's speeches in 2014. The coup d'état in Egypt and the civil war in Libya deflated the Iranian optimism regarding the Islamic movements in the region. The Iranian demoralization about the North African uprisings, the sectarian war in Syria, the rise of Wahhabi groups, and the emerging Sunni jihadism across Syrian and Iraqi territories shifted the Iranian attention to alternative discourses matching the reality on the field. The shift would also reflect Iran's growing military activism in the Middle East, i.e. how it rationalized and legitimized this activism on the field.

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[712] 'Leader: Iran's Resistance, Role Model for Awakened Nations,' *The Supreme Leader Ayatollah Khamenei Website*, October 19, 2011, http://english.khamenei.ir/news/1545/Leader-Iran-s-Resistance-Role-Model-for-Awakened-Nations.

[713] Ali Khamenei, 'Ayatollah Khamenei: Today the World of Islam Is Making a Historical Turn,' *The Supreme Leader Ayatollah Khamenei Website*, July 14, 2016, http://english.khamenei.ir/news/4191/Ayatollah-Khamenei-Today-the-World-of-Islam-Is-Making-a-Historical.

[714] Khamenei, 'Leader's Speech in Meeting with Commanders and Personnel of Islamic Revolutionary Guards Corps,' http://english.khamenei.ir/news/1591/Leader-s-Speech-to-Air-Force-Commanders.

5.3. Popular Mobilization

The idea of popular mobilization is delivered by Ayatollah Khamenei and IRGC officials with several concepts such as 'people's presence,' 'reliance on people,' 'popular support,' 'indigenous forces,' and '*Basij'* in the analyzed texts. The term has both political and military connotations. Politically, if the Islamic Awakening is the aspiration for a new political order in the region, popular mobilization is the basic strategy for accomplished Arab revolutions. In this respect, popular mobilization refers to the very revolutionary characteristic of the uprisings and emphasizes the action aspect of the revolution which is performed by and for the people. The popular mobilization in this sense refers to the centrality of the masses of people in the revolutionary moment against the existing regime. In its military sense, popular mobilization means the volunteer-based armed mobilization strategy modelled on the Iranian Islamic Revolutionary Guard Corps (IRGC) and the *Basij*.

Ayatollah Khamenei used the terms 'people's presence' and 'popular support' to emphasize the centrality of people and masses in the revolutionary action hoped to be accomplished on the Arab streets. He maintained that 'the most important element of the wave of Islamic Awakening is the presence of the people in the arena of action, battle and jihad.'[715] Therefore, people who were there for Islamic Awakening 'were present, not only with their heart, desire and faith, but also with their body and souls.'[716] The idea is that the presence of population masses gives them their revolutionary character and action. He often invokes the traditional 'oppressor' and 'oppressed' categories of Khomeini's revolutionary ideology in this respect. He perceives the existing regime elites and militaries as 'oppressors,' whereas 'People and the elite that are of the people and others who are from the people are the true owners of these revolutions that should be trusted to protect them and draw the path to the future.'[717] The public character of these movements is important, as the existing political leaders who are the bearers of corruption

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[715] Khamenei, 'Leader's Remarks at International Conference on Islamic Awakening, Video and Audio,' http://english.khamenei.ir/news/1523/Leader-s-Remarks-at-International-Conference-on-Islamic-Awakening.

[716] Ibid.

[717] Ibid.

and despotism giving rise to the outbreak of these popular movements are supported by foreign powers who aspire to have their own share in these movements.[718]

Khamenei also refers to the revolutionary movements of 1950s and 1960s in North Africa and Asia, were the 'the heavy load of the revolution was not on the shoulder of diverse segments of population and the youth from all parts of the country, but rather on the shoulder of coup d'état or small and limited armed groups.'[719] Khamenei argues that when these elements interfere in the popular movement, 'the revolution became its own enemy' and the foreign powers managed to re-force themselves on these countries.[720] Accordingly, the people as well as their struggle for the revolutionary movement constitute the true element of the revolution, whereas the existing regimes and the militaries they are struggling against are allied with external forces as per the Iranian revolutionary logic. According to Khamenei, popular support is not only important for successful revolutions, but also for fighting against foreign intervention and imperialism as well. In the conference on Islamic Awakening organized by Iran in 2012, Khamenei assures the world of Islam that 'strengthening popular support' should be a priority for Islamic governments.[721] The Islamic governments should gain the backing of the masses, as the real power comes from the people.[722] Regarding this point, he adds;

> 'Islamic governments should not separate themselves from the people. The people have certain expectations and needs. The real power is in the hands of the people. Whenever the people hold demonstrations, whenever they become firmly united and whenever they unanimously support their leaders and government officials, then America and even powers that are greater than America cannot do anything to harm them. We should maintain the support of the people and you intellectuals, authors, poets and religious scholars can do this. The most significant people are religious scholars who have a heavy responsibility. They should clarify for people what they want and where they are going. They should enlighten them about the problems and the enemy.

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[718] 'Leader: Being Popular, Most Important Element of Regional Revolutions,' *The Supreme Leader Ayatollah Khamenei Website*, September 17, 2011, http://english.khamenei.ir/news/1522/Leader-Being-Popular-Most-Important-Element-of-Regional-Revolutions.

[719] Khamenei, 'Leader's Remarks at International Conference on Islamic Awakening, Video and Audio,' http://english.khamenei.ir/news/1523/Leader-s-Remarks-at-International-Conference-on-Islamic-Awakening.

[720] Ibid.

[721] Khamenei, 'Leader's Speech to Participants of International Conference on Islamic Awakening,' http://english.khamenei.ir/news/1726/Leader-s-Speech-to-Participants-of-International-Conference-on.

[722] Ibid.

They should help the people remain vigilant. In this way, no harm will be inflicted on the Islamic Ummah.'[723]

Once the Iranian hopes for accomplished Islamic Revolutions faded, the civil conflicts in Syria, Iraq, and elsewhere escalated and Iran's military involvement became more accentuated, policy elites used popular mobilization discourse within the framework of security and military policy. Related concepts invoked in this sense are 'indigenous forces,' 'localization of security,' '*Basiji.*' The central theme around which the popular mobilization discourse is invoked in a military sense is two-fold. First, it refers to Iran's own institutional model for security, the volunteer-based armed mobilization model and culture in the revolutionary period and its immediate aftermath, the 1980-88 Iran-Iraq War. Second, especially in the IRGC usage of the term, it refers to the Iranian experience in volunteer-based mobilization being promoted by the IRGC as a 'model' for similar institutional build-ups in other countries.

In the Iranian experience, the revolutionary action was as much about institution-building as popular presence. The revolutionary movement created its own mobilization strategy by ordinary people. As discussed before, the war with Iraq in the immediate aftermath of the revolution put the new regime and ideology at an existential risk and necessitated the establishment of new security and military institutions for the survival of the regime, which were IRGC and *Basij*. It should be noted that both institutions emerged and flourished under circumstances where the existing regular army and security forces were weakened during revolution and hence were insufficient to counter the security threats. A plausible strategy was to arm the ordinary people for a military end. The long-term effect of this process was a peculiar Iranian security culture which rested on unconventional forces, 'people's war,' popular mobilization, and human wave tactics.[724] The Iranian exceptionalism in military strength and influence in the region, despite the weakness of conventional capabilities compared to other regional players, comes from this security culture that rests on unconventional forces and popular mobilization.

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[723] Ibid.

[724] Michael Eisenstadt, 'The Strategic Culture of the Islamic Republic of Iran: Religion, Expediency, and Soft Power in an Era of Disruptive Change,' *Marine Corps University Middle East Studies Monographs*, no. 7, 2015, p. 9, 22, 27, https://www.washingtoninstitute.org/uploads/Documents/pubs/MESM_7_Eisenstadt.pdf.

Another point to emphasize is the religious aspect of this popular mobilization in the Iranian security culture. The power of religion manifests at the level of religious narratives, the narrative of Karbala event, the 'oppression' of the first Shias by the 'oppressor' Umayyad dynasty in the 7th century AD, the martyrdom and sacrifice of Imam Hossein for faith and the defense of the community. Accordingly, the Karbala narrative of the Shia faith added the ingredient of motivation for the mobilization of the Shias.[725] This Karbala narrative of the Shia faith became a central component of Iranian popular mobilization during the Holy Defense War.[726] In other words, the Islamic Republic citizens volunteered for the defense of the new Islamic regime in a similar way the great Shia martyr Imam Hossein fought during the battle of Karbala against the Umayyad dynasty during the 7th century AD. The Karbala narrative became a mobilizational force for the ordinary Shia people who had to defend the Islamic Republic against an external power.

The IRGC staff's speeches continue to consistently accentuate the revolutionary, popular, and religious aspects of this ideological army after forty years of existence today. A news article on Sepah News emphasized that the IRGC is a 'revolutionary' and 'popular institution.'[727] The same source emphasizes the religious aspect of this institution, where the IRGC is 'the product of faith, spirituality, revolutionary action, and the institutionalization of the *jihadi* spirit.'[728] A commander of the IRGC implied that the IRGC has surpassed that of an institution and has become a defense school, a defense mentality and a defense brand on this own, where he stated 'During the sacred defense, the Revolutionary Guards managed to create the Islamic Revolutionary school of defense, a defense school that came from Ashura school, not military strategies taught in military schools of the world. And this school responded to various forms of wars such as irregular wars and urban wars.'[729] Given the security situation in the Middle East today, the IRGC

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[725] See Assaf Moghadam (ed.), Militancy and Political Violence in Shiism: Trends and Patterns (New York: Routledge, 2012).

[726] Ibid.

[727] See General Mohammad Bagheri's statement, Chief of Staff for the Armed Forces of the Islamic Republic of Iran, 'Sepah ba hamrahiye Mogavemat dar Suriye ve Iraq separ amniyat mellat Iran ve Omet Eslami Shode ast,' Sepah News, April 23, 2017, http://www.sepahnews.com/index.php/sepahnews/item/3565.

[728] Ibid.

[729] See General Qasem Soleimani's statement, 'Shaan Sepah balatar az an ast ke zir chatre ahzab siyasi garar gired,' *Sepah News,* April 24, 2017, http://www.sepahnews.com/index.php/ostanha/esfehan/item/3574.

portrays itself as 'the security shield of the Iranian nation and the Islamic *Ummah*,' 'along with the Islamic resistance in Syria and Iraq.'[730] An element of pride is detectable in the IRGC-related texts when talking about the successful institutionalization and influence of 'this revolutionary and pious army.'[731] The Sepah News article says that the IRGC 'has undeniably made their global fame,' over the course of forty years by being 'selflessly present in the areas of high-risk situations and where there is a need for revolution.'[732]

The second popular mobilization institution in the Iranian experience is the Iranian *Basij*. Ayatollah Khamenei places special emphasis on the *Basij* in his speeches as the epitome of popular mobilization model. As discussed before, the *Basij* has a very specific definition in Khamenei's words, where it refers to 'a group of people who show their presence in the middle of the arena and anywhere necessary with lofty divine goals and with an untiring spirit, who show their talents and bring all of their capacities to the arena, and who are not afraid of the dangers of this path.'[733] *Basij* does not only operate within the military or security structure and this form of popular mobilization covers a wide area of activity, or a 'wide scope of presence in military, scientific, and artistic arenas.'[734] Accordingly, a *Basiji* is a person who 'is prepared […] for laying down his life and sacrificing things that are even dearer to his life.'[735] The *Basij* was originally proposed by Imam Khomeini, who envisioned the establishment of 'an army of 20 million people' inside the regime, who would be constantly 'prepared for armed defense' against 'global oppression, international hegemony of superpowers, imposed backwardness and arrogance.'[736] The emphasis on preparedness for defense, being on the arena for action, and sacrifice signalize the Islamic concept of *jihad* as the basis of *Basij* development. In

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[730] See General Mohammad Bagheri's statement, 'Sepah ba hamrahiye Mogavemat dar Suriye ve Iraq separ amniyat mellat Iran ve Omet Eslami Shode ast,' http://www.sepahnews.com/index.php/sepahnews/item/3565.

[731] Ali Khamenei, 'Leader's Speech to Basijis of Kerbanshah,' *The Supreme Leader Ayatollah Khamenei Website*, October 15, 2011, http://english.khamenei.ir/news/1589/Leader-s-Speech-to-Basijis-of-Kermanshah.

[732] See General Mohammad Bagheri's statement, 'Sepah ba hamrahiye Mogavemat dar Suriye ve Iraq separ amniyat mellat Iran ve Omet Eslami Shode ast,' http://www.sepahnews.com/index.php/sepahnews/item/3565.

[733] Ali Khamenei, 'Enemies Trying to Infiltrate Decision Makers,' *The Supreme Leader Ayatollah Khamenei Website*, November 25, 2015, http://english.khamenei.ir/news/2686/Enemies-Trying-to-Infiltrate-Decision-Makers.

[734] Ibid.

[735] Ibid.

[736] Khamenei, 'Leader's Speech to Basijis of Kermanshah,' http://english.khamenei.ir/news/1589/Leader-s-Speech-to-Basijis-of-Kermanshah.

this respect, *jihad* should be understood as defense of the faith and faith community and resistance against any aggressor thereto. On a theoretical level, *Basij* should thus be considered as a collective endeavor and institutionalized form of defensive *jihad* or resistance. In a 2005 speech, Ayatollah Khamenei emphasizes this point;

> 'Basij is the manifestation of national resistance and the presence of the people on the scene. Basij is the manifestation of our nation's awareness, the kind of awareness that is accompanied by vibrancy, spirituality and sincerity. There are certain individuals who are working for the enemies of our nation's dignity by undermining the value of jihad. You know that in certain countries in the region, the Americans are trying to purge textbooks of the ayahs that are related to jihad. They have insisted that this should be done and certain weak and pathetic governments have accepted their demands. They want to eliminate jihad from the Holy Quran and Islamic teachings. This is because jihad in the way of God ensures the dignity of Muslim nations and the Islamic Ummah and it is the most important base for resistance. They tried to promote the idea that martyrdom is simplistic and naive. This is while martyrdom is one of the most valuable outcomes of jihad. Jihad can completely reveal its significance only when it is accompanied by a commitment to martyrdom. Jihad and martyrdom are two important values of the Basij movement. Our honorable Basijis have made good progress so far. It is necessary to continue making progress. There is no doubt that this role model in our dear country will play a role in the world.'[737]

Basij is an institutionalized popular resistance force in the Iranian experience, and hence is centrally related to the theme of resistance. It is the Iranian and Islamic version of popular resistance forces across the world, which mobilized under the circumstances of political issues, conflict, and revolutionary activities. According to Ayatollah Khamenei, what differentiated the Iranian *Basiji* formation from others was the longevity and consolidation of this force in the Iranian experience;

> 'The phenomenon of Basij is an innovative phenomenon. This does not mean that in other countries and places, popular resistance forces have not existed. We know that they have, but resistance forces in different countries in the world – in the west, in the east and the like – emerged during the time of political suppression and pressure, and revolutionary activities. After such revolutionary activities came to an end, either these resistance forces came to power themselves or others came to power with their assistance. After that, their resistance force and their popular organization stopped pursuing their activities. This has been the case in the world. Those who are familiar with popular resistance forces in Africa, Europe and Asia and in different countries

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[737] Ali Khamenei, 'Leader's Speech in Meeting with Basijis,' *The Supreme Leader Ayatollah Khamenei Website*, August 24, 2005, http://english.khamenei.ir/news/2041/Leader-s-Speech-in-Meeting-with-Basijis.

are aware of this. For example, during the time of the domination of the French over Algeria, popular resistance forces were formed and they fought for many years. They fought hard perhaps for eight, ten years and they endured many difficulties. However, after the formation of a revolutionary government, no trace of such forces remained. Some of them came to power and some of them formed a party, but nothing like a resistance force survived. Another example is France during the time when it was occupied by Germany. During that time, resistance forces existed – leftists, rightists and conservatives – and they fought very hard, but after liberation from German occupation and the formation of a government, no trace of such forces was seen and they were gone.'[738]

Both the IRGC and the *Basij* emerged as the institutional pillars of an Iranian security culture based on popular mobilization. It is therefore no coincidence that, as discussed in the previous chapter, both institutions acquire a central place in the Islamic Republic's foreign policy implementation in the Middle East. In the IRGC's discourses of 'indigenous defense' and 'localization of security,' which means basing the security system on popular, local, and indigenous forces, has characterized the Iranian success in deterring the security threats posed by the developments in the region. In this respect, Major General Safavi of IRGC says 'Despite the insecurity and instability of security beyond the borders of the Islamic Republic of Iran, […] the indigenous security features inside the country have prevented insecurity from entering the country.'[739] In a similar vein, the representative of the Supreme Leader to IRGC stated that 'reliance on indigenous defense' as well as 'resistance and jihadist organization' has been the primary strategy of enhancing internal power in the face of the conflicts in the Middle East today.[740] Besides enhancing the Iranian deterrence capacity against regional threats, popular mobilization as indicated by the concepts of 'people's presence,' 'reliance on people,' 'indigenous forces,' and '*Basiji*' has also served as discursive mechanisms for the mobilization of Shias in the region. The Iranian predominance in the mobilization of Shia armed groups and paramilitary organizations, despite the multivocality of Shia revival and political leadership in the Middle East, can be attributed to the forty years of

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[738] Khamenei, 'Enemies Trying to Infiltrate Decision Makers,' http://english.khamenei.ir/news/2686/Enemies-Trying-to-Infiltrate-Decision-Makers.

[739] See General Safavi's statement, the Supreme Leader's Advisor, 'Godrate melli daronza tanha rah hal bronraft az moshkelat egtesadi ce siyasi ve farhangi ast/ adam amniyat monjar be napaydari dar moaalefehaye tosee mi gardad,' *Sepah News*, May 16, 2017, http://www.sepahnews.com/index.php/sepahnews/item/3691.

[740] Hojjat-al-Eslam Saeidi, Supreme Leader's Delegate to the IRGC, 'Doshman Eshtebah mohasebati konad, pasokh mohkami daryaft khahad kard/ Eghtesad mogavemati ve modiriyet jahadi moalefehaye sakht daroni godrate,' *Sepah News*, June 24, 2017, http://www.sepahnews.com/index.php/sepahnews/item/3844.

experience, accumulated resources, and organization capacity of the Islamic Republic in popular mobilization.

As discussed before, the IRGC-related media outlets portray both the IRGC and the *Basij* as a model for mobilization in the region. A message released by Chief of Staff of the Iranian Armed Forces Major General Mohammad Hossein Baqeri in 2016 for the 37th anniversary of the formation of the Iranian *Basij* said that the Iranian *Basij* can be an inspiration for the foundation of an Islamic World *Basij*.[741] The same news article published by Tasnim News Agency, an agency close to IRGC, continued saying that 'Inspired by the Iranian *Basij,* a similar organization has been established in Iraq, known as the Popular Mobilization Units or *Hashd al-Shaabi*.'[742] In a similar vein, a news site close to the Iranian *Basij* quoted a spokesperson for the *Hashd al-Shaabi* saying that the Iraqi *Hashd al-Shaabi* are a continuation of the Iranian *Basijis*, where the Iraqi counterparts relied heavily on the Iranian *Basij* experience.[743] The same news article continued quoting Nouri al-Maliki saying that the Iraqi government adopted the form and structure of the Iranian *Basij* when establishing the *Hashd al-Shaabi*.[744] In a foreign policy analysis published in the Payam-e Enghelab, the official policy journal of IRGC, the self-acclamation by Iranian security forces as a model is evident:

> 'This, the dialogue between popular forces such as *Jaysh al-Sha'abi* in Syria and *Hashd al-Shaabi* in Iraq, which is based on the modeling of the IRGC and the Iranian *Basiji,* is an indication of the influence of Iran's sovereignty in the neighboring countries. Without doubt, what has made IRGC popular in the neighborhood is not only the military power and the deterrence capacity, but also the influence of divine values and the jihadist thinking. The young people who have formed the Islamic resistance in Syria, Lebanon, Iraq and Bahrain these days are the same youth who have modelled on the ideals of Islamic resistance, martyr Sayyed Abbas Mousavi, or the Lebanese Party. Today it is thanks to both the military power and this jihadist thinking

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[741] 'Formation of Islamic World's Basij Feasible: Iran's Top Officer,' *Tasnim News Agency*, November 23, 2016, https://www.tasnimnews.com/en/news/2016/11/23/1248368/formation-of-islamic-world-s-basij-feasible-iran-s-top-officer.

[742] Ibid.

[743] 'Niyruha-ye Mardomi Iraq Che Kesani Hastand va Cha Mi Khahand? (What is Iran's Popular Forces and What Do They Want?' *Basij Press*, July 11, 2016, http://basijpress.ir/fa/news-details/79355/ای‌نیروهای‌مردمی‌عراق‌چه‌کسانی‌هستند‌و‌ چه‌می‌خواهند؟/.

[744] Ibid.

dominant in the IRGC that the strategic depth of the Islamic Republic is beyond its territorial boundaries.'[745]

In conclusion, popular mobilization, both as a discourse and as a strategy, is the basis of Iran's security culture. Iran's state-to-sub-state relations in the Middle East region rests on popular mobilization. Iran relies on the idea of 'people's presence,' '*Basij,*' and 'indigenous forces' as a strategy for revolutionary action, as a legitimation tool for armed mobilization, and as a self-acclaimed organizational model of a security institution for its Middle Eastern audience today. Religious narratives of Karbala, martyrdom, and *jihadi* thinking accompany popular mobilization. The discourse attains further relevance when combined with the discourse of 'resistance' and Iran's alliance-network associated with it, which will be discussed in the next section.

5.4. Resistance

Resistance is the most frequently used discourse by the Iranian political and military elites. In the modern Islamic intellectual thought, the concept refers to the Islamic nations' resistance against Western imperialism and colonialism over the Muslim lands.[746] Walberg traces the emergence of Islamic resistance to Abd al-Wahhab's Salafism in this respect, where the return to the essence of Islam by 'the strict emulation of the prophetic way of life and thought' was a reaction to Western colonization and the penetration of their economic, social, and political models into the Muslim territories in the 18th century.[747] In the 19th century, al-Wahhab's idea of countering colonization developed into political activism, where Jamal al-Din al-Afghani of Iran advocated the idea of pan-Islamism as a political ideology against British colonialism. He sought to unite Muslims around the idea of political Islam by organizing secret meetings, publishing leaflets, and participating in the assassination of the Iranian king at the time.[748] In the 20th century, the

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[745] 'Dar Sayeye Egtedar Solh, (in the shadow of Peace Auhority),' http://www.sepahnews.com/images/payam94/payam.pdf.

[746] See Eric Walberg, *Islamic Resistance to Imperialism* (Atlanta: Clarity Press, 2015).

[747] Ibid., p. 23.

[748] See 'Al-Afghani, Jamal al-Din,' *Oxford Islamic Studies Online*, accessed April 28, 2018, http://www.oxfordislamicstudies.com/article/opr/t125/e54; 'Jamal al-Din al-Afgani,' *Al-Islam Online*, accessed April 28, 2018, https://www.al-islam.org/history-muslim-philosophy-volume-2-book-8/chapter-74-jamal-al-din-al-afghani.

Muslim Brotherhood movement of Egypt, intellectually and organizationally led by Hasan al-Banna and Sayyid Qutb, marked the hallmark of Islamic resistance in the Middle East.[749] When political pressures forced Muslim Brotherhood cadres out of Egypt, the organization and ideology spread across the Middle East, encouraging similar organizational set-ups and alternative Islamist political movements in the region. The Islamic resistance was thus an intellectual and political movement against Western colonialism and imperialism in the Muslim world with a history of almost three centuries, spearheaded by both Sunni and Shia scholars alike.

In the Iranian Islamic intellectual and political thought, the concept of 'resistance' (*moqawamat* in Persian) was widely embraced after the 1979 Islamic Revolution and the anti-imperialist and political Islamist content of the original movement was maintained. Today, 'resistance' is a multi-layered concept in the Iranian political discourse, blending a strong anti-imperialist ideology, revolutionary Islamism, and Shia narratives. Moreover, the content of the concept has gradually transformed in line with systemic changes. Today, if the Islamic Awakening is an aspiration for a new political order in the region and popular mobilization is the central strategy thereof, the idea of resistance adds the element of legitimacy. The discourse has several referents in the Islamic Republic's Middle East policy. First, resistance refers to the Islamic Revolution of 1979, whose ideological background incorporates the idea of resistance to the authoritarian regime at home and foreign intervention abroad. Second, the revolutionary institutions in Iran use the concept in combination with Iran's popular mobilization forces and security units, where it strongly overlaps with the discourse of popular mobilization. Third, the term refers to the anti-US and anti-Israel alliance network in the Middle East called 'the axis of resistance' (*mehvar-e moqawamat* in Persian) or 'resistance front' (*cephe-ye mogawamat* in Persian). Finally, the content of the 'axis of resistance' is reworked to encompass the Iran-led alliance network that further extends to the Shia elements across the region. In this last definition, 'the axis of resistance' approximates 'the Shiite Crescent' in a geographical sense.

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[749] See 'Muslim Brotherhood,' *Encyclopedia Britannica Online*, accessed May 3, 2018, https://www.britannica.com/topic/Muslim-Brotherhood.

The Islamic Republic's mode of existence is one of resistance. With its revolutionary ideology and practice, the Islamic Republic has long claimed the mantle of anti-imperialist and Islamic resistance in the Middle East. The 1979 Revolution is ingrained in Islamic Republic's self-identification as a moment of resistance first against the Shah regime, whose liberal-modernist reforms presumably disrupted the socio-economic and political structure in Iran and augmented socio-political grievances at home. In addition to that, foreign interference in Iran's key economic and governmental sectors by Western powers as well as the infiltration of western political and economic systems in Iran was another justification for resisting externally. The blend of 'internal' and 'external' reasons for resistance is invoked frequently in Ayatollah Khamenei's speeches;

> 'Before the victory of the Islamic Revolution, Iran was part of US empire in this region. The former regime was quite loyal to the United States and implemented all the policies that were dictated to it by Washington. The national wealth of the Iranian people was at US disposal, and the three government branches were controlled by the United States. […] Despite all US support for the former regime, the Islamic movement culminated in victory, thanks to the strong resistance of the Iranian nation and the wise leadership of Imam Khomeini.'[750]

It is clear in Khamenei's speech that the USA is the main referent of resistance against imperialism. Nevertheless, one should approach the Iranian regime's anti-US discourses from a more systemic perspective, where international system and the distribution of socio-economic and political power maintained by the USA is more central to the anti-imperialism discourse of the Iranian leadership than the USA per se. Khomeini's traditional conceptualization of 'oppression' and 'global arrogance' refers to this very US hegemony. The resistance of the Muslim countries and Iran is against the hegemony, i.e. 'the global arrogance,' or *estekbar* in the Iranian political discourse. The Islamic resistance in the Muslim lands is thus portrayed as the most powerful strategy to end this 'global arrogance.' This line of thinking is compatible with the original use of the term by former Islamist resistance movements. Ayatollah Khamenei's remarks in the occasion of pilgrimage in 2001 makes this point clear;

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[750] Ali Khamenei, 'Leader's Speech on Student's Day,' *The Supreme Leader Ayatollah Khamenei Website*, November 4, 2002, http://english.khamenei.ir/news/152/Leader-s-Speech-on-Students-Day.

'The US and other arrogant Western powers have finally concluded that Muslim countries and nations, especially those of the Middle East, form the core of this awakening and resistance to their plans for global domination. If they fail to control or suppress this Islamic Awakening in the next few years through economic, political, propaganda and military tools, all their plans for an absolute global hegemony and control of the most vital oil and gas resources […] will be ruined. If that happens, big western and Zionist capitalists, who are the ones that control all the arrogant governments, will fall from the peak of their imposed power.'[751]

Nevertheless, what differentiates the Iranian resistance from others is the culmination of this movement into a successful revolution, overthrowing a US-dependent regime and establishing a new Islamist political system. Ayatollah Khamenei thus portrays the Iranian Revolution as an inspirational moment and the exemplary model of an emancipatory Islamist political movement for other countries. His remarks in the occasion of National Day of Fighting Global Arrogance in 1990 is a case in point;

'Hope is awakening nations of the world. Undoubtedly, the victory of the Islamic Revolution in Iran, the establishment of a government, which was independent of the West and the East and promoting the policy of resistance against the arrogant powers, have been the most important source of hope for nations of the world during the past ten years. These realities gave hope to the people of the world, especially Muslims. These realities awakened the people of the world.'[752]

If the Islamic revolution was the first pillar of resistance, the Holy Defense War was the second to test the strength and durability of the Iranian resistance movement. Related to this point, Interviewee 1, a researcher at a research center on Islamism in Iran, argues 'The resistance culture, which is one of Khamenei's discourses today, has roots in the Holy Defense War and the US policy of imperialism.'[753] Ayatollah Khamenei reiterates this point often in his speeches, where he says that the war was a defensive war and a moment of resistance.[754] The Iranian regime's understanding of resistance during

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[751] 'Leader's Views on the Islamic Awakening,' http://english.khamenei.ir/news/1458/Leader-s-View-of-Islamic-Awakening#The_wave_of_Islamic_Awakening.

[752] Ali Khamenei, 'Leader's Address to Government Officials,' *The Supreme Leader Ayatollah Khomeini Website*, March 13, 1990, http://english.khamenei.ir/news/1446/Leader-s-Address-to-Government-Officials.

[753] Interviewee 1, Researcher speciliazed on Islamic political thought and the intellectual history of the Islamic Revolution at the Center for Islamic Research, in Tehran, Iran. Interview 2 with the author, conducted on August 14, 2016 at Park Sayee, Tehran, Iran.

[754] Ali Khamenei, 'Leader's Speech in Meeting with Soldiers and Commanders of the Sacred Defense Era,' *The Supreme Leader Ayatollah Khamenei Website*, October 21, 2006, http://english.khamenei.ir/news/2066/Leader-s-

the Holy War was systemic as well. As discussed before, the Islamic Republic viewed the eight-year-long war not only as a defense against the Iraqi regime, but also against the international community and their regional allies who sought to uproot the new Islamic regime and its ideology. In the Iranian mind, the Islamic Republic proved the strength of its resistance against a plethora of players that seek to maintain the existing regional and international system. Regarding this point, Interviewee 1 also states;

> 'Regarding the Holy Defense War, Khomeini once said "Our enemy is not Iraq. All of the Western countries were supporting Iraq.' Saddam was in opposition to the USA and USSR, but these countries along with the UK, Germany, and France all supported Iraq. The war was thus not a regional war, it was a philosophical and political war between the discourse of political Islam that appeared suddenly in the region and the West. It was an ideological warfare and the enemy was not the West, but the West led by the USA. Khamenei dissociates modernity from imperialism of the West as a political regime in his discourse. The enemy was not modernity itself, but the political systems of the West. Therefore, the "resistance' was against American imperialism, and the war was defending Islam. The war was not intended for economic or political benefits. The war was holy, because it was protecting Islamic values. This "holy war' and "resistance' logic is the official discourse in Iran today.'[755]

Because of both the revolutionary experience and the Holy War experience, the Islamic Republic identified itself as the institutional and governmental epitome of resistance. Related to this point, Ayatollah Khamenei refers to the Islamic Republic 'as a government of resistance.'[756] He specifically differentiates between 'a government of resistance' and a 'personality' of resistance or resistance 'orientation,' where the former 'has politics, an economy, international action, and an extensive influence zone inside and outside the country.'[757] The governmental character of the Iranian resistance movement gives the Iranian state an element of extensiveness in its operations and power. Khamenei emphasizes this power element by stating that '*Jihad* and resistance in a nation is one of the sources of national power' and that resistance means 'adopting a position of

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Speech-in-Meeting-with-Soldiers-and-Commanders-of-the.

[755] Interview 2 with Interviewee 1.

[756] Ali Khamenei, 'The Enemy Wants to Take Away Iran's Deterrent Power, Ayatollah Khamenei,' *The Supreme Leader Ayatollah Khamenei Website*, May 10, 2017, http://english.khamenei.ir/news/4807/The-enemy-wants-to-take-away-Iran-s-deterrent-power-Ayatollah.

[757] Ibid.

power' against imperialist and colonialist powers.[758] The implication here is that all resistance movements should end up in a governmental and institutional formulation, i.e. they should establish a resistant Islamic government in their countries of operation. According to the same logic, the Islamic Republic is the first example of an Islamic resistance movement turning into a government of resistance, which can inspire and support other Islamic resistance movements for the same aim. This marks the linkage between 'the export of the revolution' and 'resistance' logics in this respect.

How does religion play out in the resistance discourse? It should be noted that the resistance against perceived imperialism and colonialism is one of Islamic resistance in the Iranian foreign policy discourse. Islam is always a basic element of resistance in Khamenei's speeches for a number of reasons. First, political Islam, and thus Islamic Awakening, is considered and portrayed as a 'power' against the existing US-maintained system in the region. This makes Islam an opposition force to and a target of opposition for 'global arrogance' in the Iranian discourse. This is highlighted in a 1989 Khamenei speech, where he says;

> 'The opposition of the arrogant powers to Islam is not limited to what they did to Iran, the people of Iran, and the Islamic Republic, rather opposition to Islam was seriously pursued on a larger scale through political and propaganda campaigns as well as through cultural methods. The pressure that has been mounted on Muslim activists, freedom fighters, religious scholars and intellectuals in Islamic countries by the regimes which are dependent on America, the pressure that has been mounted on Muslim minorities in non-Islamic countries, the clear cases of a political battle against Islam, producing articles, books and insulting films against Islam and distributing them in Islamic and non-Islamic environments – these are clear cases of the cultural battle against Islam.'[759]

Second, Islam's relevance to the fight against 'global arrogance' comes in its capacity to form a collective identity. Uniting the Muslim nations as a front against 'arrogance,' bringing together the Islamic *Ummah* under the experienced leadership of the Islamic Republic is put forward as a force to fight against Western-inflicted crises in the region. Ayatollah Khamenei states;

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[758] Ibid.

[759] 'Leader's Views on the Islamic Awakening,' http://english.khamenei.ir/news/1458/Leader-s-View-of-Islamic-Awakening#The_wave_of_Islamic_Awakening.

'Economic powers are capable of creating crises. It is economic powers who create crises, wage wars and establish violent and brutal regimes […]. It is necessary to challenge them. What is it that can challenge them? A vibrant collective international identity that relies on religious faith. It is this collective identity that would prevent humanity from feeling tired. Except for vibrant religious faith, everything else would cause exhaustion in the long run. A collective international identity can challenge those powers, reduce their influence and ultimately eliminate them. By Allah's favor, this goal will be achieved under the just rule of the Imam of the Age. […] Today this collective international identity is in the process of formation and the Islamic Republic is the core.'[760]

Third, borrowing again from the discourse of 'Islamic Awakening,' the leadership believed that successful resistance depends on the level of institutionalization of these movements. Khamenei again invokes 'the government of resistance' in this respect, where he argues that only a governmental system built on Islamic resistance can fight against oppression. In his address to the members of the Assembly of Experts in 2016, he says;

'Only the kind of Islam that enjoys a government, a military force, media, politics, economy and many tools and instruments can annihilate *kufr* and oppression or restrict and prevent it from transgressing. Only the kind of Islam that has managed to build a system and establish a government can resist. Otherwise, if individuals – although they might be outstanding Muslims – and Islamic movements, like the ones that exist in the world, do not move towards the goal of establishing a government, they will not cause any danger to arrogance.'[761]

Finally, religious narratives merge with the discourse of popular mobilization and form the mobilizational aspect of 'resistance' discourse. In this respect, Iran's popular mobilization model and security institutions are called resistance forces and the term refers to the basic institutional tool for resistance. A survey of Ayatollah Khamenei's speeches show that Khamenei uses the term predominantly when addressing the IRGC, *Basij*, and Imam Hossein University students, which is tasked with training IRGC staff for the Islamic Republic. In this respect, Ayatollah Khamenei defines *Basij* as 'the

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[760] Khamenei, 'Leader's Speech in Meeting with Basijis,' http://english.khamenei.ir/news/2041/Leader-s-Speech-in-Meeting-with-Basijis**.**

[761] Ali Khamenei, 'Without a Doubt, Islam is a Demolisher of Oppression and Arrogance,' *The Supreme Leader Ayatollah Khamenei Website*, May 26, 2016, http://english.khamenei.ir/news/3871/Without-a-doubt-Islam-is-a-demolisher-of-oppression-and-arrogance.

manifestation of national resistance.'[762] In a similar vein, a statement by IRGC on Sepah News stated that 'IRGC has not only proved influential in regional and global affairs as a defensive military force, but has also revealed itself as a model and thinking of the resistance' for other nations who are looking to their independence.[763] Religious narratives again serve as strong mobilization and institution-building forces. Khamenei's speeches bear strong religious connotations when he talks about resistance forces. He highlights the Shia narratives of Karbala, i.e. Imam Hossein's defense and martyrdom during Karbala Battle, as one of resistance.[764] The ideas of *jihad*, sacrifice, and martyrdom emerge as the basic tenets of resistance in this respect.[765] The popular mobilization model, achieved by the participation of ordinary people and the mobilization of authentic and indigenous forces, serve as the Islamic Republic's resistance forces. The religious and Shia elements are invoked to create a legitimizing discursive narrative for resistance.

How does the idea of 'resistance' play out in actual foreign policy making on a more practical level? After the 1979 Revolution, the idea of 'resistance' played out in the Holy Defense War and 'export of the revolution' during the first decade of the revolution. Today, the anti-imperialist conceptualization of resistance manifests politically and diplomatically in Iran's relations with the wider international community. Iran's nuclear program, an issue which predominantly intrigues the international community's relations with the Islamic Republic, is the epitome of Iranian diplomatic resistance against the West today. In this respect, Iran's years-long insistence on the nuclear program until the signing of the JCPOA can be considered as a policy of resistance against the international nuclear status-quo sealed by the Nuclear Non-Proliferation Regime, which is considered to be highly contentious and discriminatory by the Iranian leadership.[766] Iran considers its

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[762] Khamenei, 'Leader's Speech in Meeting with Basijis,' http://english.khamenei.ir/news/2041/Leader-s-Speech-in-Meeting-with-Basijis.

[763] 'Sepah Pasdaran Separe Defaei Iran ve Mogavemeat dar barabare nezam solte ve sahyonizm ast,' *Sepah News*, April 20, 2017, http://www.sepahnews.com/index.php/etelaieah/item/3557.

[764] Ali Khamenei, 'Leader's Speech at IRGC Navy Base,' *The Supreme Leader Ayatollah Khamenei Website*, March 10, 2003, http://english.khamenei.ir/news/135/Leader-s-Speech-at-IRGC-Navy-Base.

[765] Khamenei, 'Leader's Speech in Meeting with Basijis,' http://english.khamenei.ir/news/2041/Leader-s-Speech-in-Meeting-with-Basijis**.**

[766] For a discussion on Iran's nuclear policy and the resistance discourse, see Homeira Moshirzadeh, 'Discursive Foundations of Iran's Nuclear Policy,' *Security Dialogue* 38, issue 4 (2007): p. 521-543.

nuclear program as a proof of scientific development and technological modernization, accomplished through technological independence from other nations and a self-standing attitude. In the Iranian logic, the international community's response to Iran's resistance was the strict imposition of economic sanctions on Iran. The Supreme Leader reacted to the economic sanctions by what he termed as 'the economy of resistance' in return. 'The economy of resistance' is about optimal management of the economy under strict international pressures. In his speeches, Ayatollah Khamenei described the characteristics of resistance economy as 'putting the people in charge of economy,' 'minimizing the nation's dependence on oil,' 'managing consumption,' 'using domestically produced products,' 'developing plans - such as the targeted subsidy plan,' and 'strengthening national production.'[767] In other words, the resistance economy is an economic model based on self-sufficiency in the face of international sanctions on the Iranian economy.[768] In short, the Iranian insistence on the nuclear program and the resistance economy are the manifestations of diplomatic and political resistance against the West.

Nevertheless, the idea of resistance manifests more on the military front as an alliance strategy. Since the 1979 Revolution, the Islamic Republic has used the term, both with its anti-imperialist and Islamist connotations, to refer to political and armed groups sharing an anti-imperialist, anti-US, and Islamist political vision. In this conceptualization, the Lebanese Hezbollah and Palestinian Resistance groups were the first to become the referents of Islamic resistance. The term resistance is very widely used in Iran's political discourse in referring to Lebanese Hezbollah and Palestinian resistance. Since the revolution, the Islamic Republic has adopted a very clear position on the Israel-Palestine issue, where the regime openly declared its ideological and moral opposition to 'Zionism' and openly supported the build-up and further empowerment of Lebanese Hezbollah against Israel. Upon recommendation by Ebrahim Yazdi, the first prime minister of the Islamic Republic, Ayatollah Khomeini announced the last Friday of Ramadan as the International Qods Day in 1979.[769] In an international conference

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[767] 'The Most Important Concepts Discussed by the Leader in 1391,' *The Supreme Leader Ayatollah Khamenei Website*, April 19, 2013, http://english.khamenei.ir/news/1768/The-Most-Important-Concepts-Discussed-by-the-Leader-in-1391.

[768] 'Resistance Economy Way to Counter US Sanctions: Senior Cleric,' *The Iran Project*, July 28, 2017, https://theiranproject.com/blog/2017/07/28/resistance-economy-way-counter-us-sanctions-senior-cleric/.

[769] For Ayatollah Khomeini's 1979 message on the Qods Day and a relevant analysis, see Hamid Ansari, 'Quds Day,' *Imam Khomeini Website*, accessed April 27, 2017, http://en.imam-khomeini.ir/issues/issue13/Quds-E-Book.pdf.

organized in 2006 for the Holy Qods, Ayatollah Khamenei used the resistance discourse for both Lebanon and Palestine;

> 'Religious faith, to which the Palestinian nation strongly adheres, gradually created some bright spots on the dark and gloomy horizon, thanks to the firm determination of patient and persevering mujahedin, and gave rise to hopes and motivation. At this time, the sun of 'Islamic Revolution' suddenly rose in the east, and the hoisted flag of this divine revolution was embellished with the words 'Allah', 'the Islamic Sharia' and 'Palestine.' […] The jihadi groups devoted to Islam emerged in Palestine and Lebanon and constituted a generation of dedicated and determined combatants. Jihad and martyrdom were revitalized and the genuine power, namely the power of a nation that was intent on resistance and self-sacrifice, attained its due status in the equations of Palestine and the region.'[770]

In Ayatollah Khamenei's speeches, the Palestinian Hamas and Islamic Jihad, the Lebanese Hezbollah and any other group that is fighting against Zionism are defined as resistance groups.[771] He is also quite vocal about Iranian support and political assistance to various Islamic resistance groups that are in harmony with Iran's anti-Zionism and resistance discourses. In a speech delivered in a conference on Palestinian intifada in 2017, Khamenei pays tribute to several groups such as Saraya al-Quds from Islamic Jihad, Kataeb al-Izz ad-Din al-Qassam from Hamas, Kataeb al-Shuhada al-Aqsa from Fath as playing important roles for the Islamic resistance.[772] He also reiterates Iranian support for any group involved in the resistance movement;

> 'Our position on the Resistance is a fundamental position, one which has nothing to do with any particular group. We are with every group that is steadfast on this path and every group that abandons this path has drifted away from us. The depth of our relationship with groups involved in the Islamic Resistance is only dependent on the level of their commitment to the principle of the Resistance.'[773]

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[770] Ali Khamenei, 'Leader's Address to the 3rd Intl. Conference on the Holy Quds and Support for the Palestinian People,' *The Supreme Leader Ayatollah Khamenei Website*, April 14, 2006, http://english.khamenei.ir/news/63/Leader-s-Address-to-the-3rd-Intl-Conference-on-the-Holy-Quds.

[771] Ali Khamenei, 'Leader's Statements in a Meeting with Participants in IWMC,' *The Supreme Leader Ayatollah Khamenei Website*, January 31, 2002, http://english.khamenei.ir/news/162/Leader-s-Statements-in-a-Meeting-with-Participants-in-IWMC.

[772] Ali Khamenei, 'We are with Every Group That is Steadfast on the Path of Resistance,' *The Supreme Leader Ayatollah Khamenei Website*, February 21, 2017, http://english.khamenei.ir/news/4644/We-are-with-every-group-that-is-steadfast-on-the-path-of-Resistance.

[773] Ibid.

The Palestinian resistance and Hezbollahi resistance are considered to be part of the same international movement headed by the Iranian Resistance. Like the Islamic Awakening and popular mobilization, 'the Iranian model' mindset is also apparent in the resistance discourse. In this respect, Ayatollah Khamenei says that the Islamic Republic and its revolutionary moment is 'a model and lesson for other nations' including Palestine and Lebanon, as 'The Palestinians said to us, "We learned from you." The people of Lebanon too repeatedly said to us that they learned from us.'[774] A self-acclaimed model of resistance for the Lebanese and Palestinian resistance movements, the Iranian leadership reiterates its position on 'providing [the Palestinian and Lebanese resistance] with whatever assistance they need until they achieve their final victory.'[775]

Iran's relations with resistance groups fighting against Israel culminated in an alliance system over time, where especially the IRGC and affiliated sources began to use the term 'resistance' in combination with the terms 'axis' and/or 'front' and called this alliance system 'the axis of resistance' and/or 'resistance front.'[776] Former professor of international relations Abbas Khalaji defines the 'resistance front' 'both [as] a religious and strategic issue.'[777] He continues;

> 'Religiously, this front has the responsibility of providing support to Shia groups. We look at this issue from a revolutionary perspective. Before the revolution, Feth, Jihad, Hamas, Hezbollah were being supported. Strategically, the USA, Zionism, and Israel are the biggest enemies. Iran and the resistance front had to open up a strategic front to fight against the USA and Zionism.[778]

Hossein Malaek, a former Iranian diplomat and foreign policy expert, reemphasizes that 'the resistance axis' originally relates to the resolution of the

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[774] Khamenei, 'Leader's Speech in Meeting with Soldiers and Commanders of the Sacred Defense Era,' http://english.khamenei.ir/news/2066/Leader-s-Speech-in-Meeting-with-Soldiers-and-Commanders-of-the.

[775] Ali Khamenei, 'Leader's Speech at Intl. Conference in Support of Intifada,' *The Supreme Leader Ayatollah Khamenei Website*, April 24, 2001, http://english.khamenei.ir/news/166/Leader-s-Speech-at-Intl-Conference-in-Support-of-Intifada.

[776] See General Hajizadeh's statement, the Commander of IRGC Air Forces, 'Pasokhe kobandeh sepah be tahdidate Bolofe siyasi nist,' *Sepah News*, June 24, 2017, http://www.sepahnews.com/index.php/sepahnews/item/3850.

[777] Interview with Khalaji.

[778] Ibid.

Palestinian issue.[779] According to Malaek, the USA was aware of this axis as early as 1990s, when it proposed the two-state solution.[780] He argued that the two-state solution was an acknowledgement that an anti-US and anti-Israeli 'axis of resistance' existed in the region, which was expected to fall with the acceptance of the solution.[781] Malaek also emphasizes the highly ideological nature of the axis, as the axis had an Islamist orientation and encompassed the Islamic movements from Hamas to Iranian Shias.[782]

The anti-US and anti-Israeli 'axis of resistance' gained an increasingly strategic character when with the consolidation of Iran-Syria alliance during the Iran-Iraq War and Lebanon's War with Israel. Over the years, Syria has proved to be a dependable ally for Iran serving as a route to Lebanese Hezbollah and supporting the Lebanese Hezbollah against Israel, despite its secular and Baathist political ideology. Syria has thus become a central component of 'the axis of resistance' alliance, whose relevance proved to be even more critical after 2011. Interviewee Mostafa Dehghan emphasizes the strategic role of Syria in 'the axis of resistance' alliance in this respect. He argues 'Iran has dependence on Syria and the Assad regime in the sense that Syria is the route to reach Lebanon, a safe place for Iran to arrange its meetings with Hezbollah, and transfer weapons. Therefore, Iran has the policy of "resistance axis,' which includes Lebanon, Palestine, Syria, and Iran.'[783] In a similar vein, Interviewee 8 also emphasizes the strategic centrality of Syria for 'the axis of resistance' where he says that the Syrian uprisings and the Syrian civil war were considered by Iran 'as weakening the resistance front,' where both are considered to be arranged by foreign powers to weaken the Iran-Hezbollah-Syria alliance.[784]

The IRGC and affiliated sources used the term 'axis of resistance' frequently to refer to the Iran-led alliance network of Iran, Hezbollah, Syria, and Palestinian resistance groups after 2011 in the region. Like Interviewee 8, these sources also emphasized the

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[779] Interview with Malaek.

[780] Ibid.

[781] Ibid.

[782] Ibid.

[783] Interview with Dehghan.

[784] Interview with Interviewee 8.

centrality of Syria in preserving the alliance. The discourse also boded well with Iran's military engagement in the Syrian conflict and unfailing support for the Assad regime. The Supreme Leader's advisor to IRGC said 'the strategy of the Islamic Republic of Iran in Syria focuses on the axis of resistance and the preservation of Syria as the core of the resistance.'[785] 'The axis of resistance' became a legitimizing discourse for the Iranian regime's strategic calculations in the region after 2011, without underemphasizing the religious and ideological dimensions of the axis though. An IRGC commander stated that 'Iran is a serious actor in the region, the hope and shelter of the Islamic world, and the main sponsor of the countries of the axis of resistance.'[786]

Iran's 'axis of resistance' discourse is quite dynamic, rather than static, where both its ideological and strategic content and referents expand as allowed by political circumstances. Accordingly, IRGC commanders and affiliated sources have included Iraq and Yemen into the Iran-Hezbollah-Syria-Palestine alliance during the past couple of years. The content of the concept expanded in parallel to increased IRGC assistance to the Syrian regime, the Iraqi Shias, and Yemeni Houthis. A Sepah News article, quoting an IRGC commander called Jamal al-Din Abromand, uses the 'axis of resistance' term with its content expanded;

> 'The events that we see today in Iraq, Syria, Lebanon and Yemen indicate that global arrogance is seeking to eradicate the issue of Islam in the region or change it to non-revolutionary Islam. […] Today, Syria is the front line of the resistance front, and we feel it all the way. […] Iranian nation will not forget Syria's assistance to Iran during the imposed war of global arrogance and Saddam and by God's grace, the standing and resistance of the nation, the army and the government of Syria will eventually […] overcome its terrorists and enemies. We believe that the task of the war is determined on the ground, [and] we will use all our capabilities to help win the resistance front, and like the holy defense period, there should be commanders in the middle of the field.'[787]

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[785] Hojjat-al-Eslam Saeidi, Supreme Leader's Delegate to the IRGC, 'Doshman Eshtebah mohasebati konad, pasokh mohkami daryaft khahad kard/ Eghtesad mogavemati ve modiriyet jahadi moalefehaye sakht daroni godrate,' http://www.sepahnews.com/index.php/sepahnews/item/3844.

[786] See General In-Chief Maaroufi's statement, Commander of IRGC in Sistan-Balouchestan, 'Eghtesad mogavemati tanha noskheye shafabakhsh mellat Iran ast,' *Sepah News,* May 13, 2017, http://www.sepahnews.com/index.php/ostanha/sistanbalochestan/item/3675.

[787] See General Aberomand visiting his Syrian counterpart, 'Estekbar jahani dar sadade rishe kan kardane Eslam dar mantaghe ast/ Suriye piruze miyane mogabele ba godrathaye estekbari ast, az hich komaki be jebheye-mogavemat darig nakhahim kard,' *Sepah News*, May 12, 2017, http://www.sepahnews.com/index.php/sepahnews/item/3624.

The Revolutionary Guard Corps call 'the axis of resistance' as an alliance system in the region. The ever-changing regional balances are quickly reflected into the content of the discourse. In this respect, a 2017 analysis that appeared in Payam-e Enghelab portrayed the resistance axis as an alliance of Iraq, Syria, Iran, and Lebanese Hezbollah as opposed to Turkey and Saudi Arabia, who are claimed to coordinate with the USA and Israel in the region.[788] According to IRGC's analysis, Turkey, Saudi Arabia and the USA block is trying to increase its political leverage in Syria and Palestine by supporting the Salafist-Takfiri ideology and curbing the Islamic Awakening in the region.[789] IRGC's identification of allies and enemies strongly reflects the realpolitik, i.e. power balances and alliances in the region, which highlights the strategic character of 'the axis of resistance' at the practical level.

On an ideological level, the IRGC maintains the dominant anti-imperialist aspect of 'the axis of resistance' discourse. Another Sepah News article quotes a university professor, who says that 'the Western-led forces, led by the United States and the Zionist regime' aim to generate geopolitical crises in the Middle East.[790] The university professor is also quoted saying the goal of 'the US-led and Zionist-led Western powers' in creating this geopolitical crisis in the region is to destabilize the resistance-oriented states, cause the possible breakdown of Iraq, Syria, Libya, Yemen, and to prevent the freedom of Palestine.[791] The anti-American and anti-Zionist stance of the resistance axis is clear in IRGC's analyses, where they frame Iran's strategic stance in an anti-American and anti-Zionist discourse. Iran's traditional ideological commitment to anti-imperialism, anti-Americanism, 'oppression,' and 'global arrogance' is thus consistently maintained in the axis of resistance discourse.

Nevertheless, anti-imperialism was not the only ideological element that contributed to the expansion and consolidation of 'the axis of resistance' alliance. The sectarian nature of the conflict in Syria, the rise of ISIL threat, and the threat of sectarian

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[788] 'Dar Sayeye Egtedar Solh, (in the shadow of Peace Auhority),' http://www.sepahnews.com/images/payam94/payam.pdf.

[789] Ibid., p. 29-30.

[790] See General Safavi's statement, Khamanei's Advisor, 'Mehvariyate Amrica ba bekargiri rahbor siyasi be donbale jologiri az nabodiye teroristha dar in magtae zamani ast,' *Sepah News*, June 19, 2017, http://www.sepahnews.com/index.php/component/k2/item/3817.

[791] Ibid.

terrorism against Shia populations have generated two new official discourses that supplemented the axis of resistance: '*takfiri* terrorism' and 'the defense of the holy shrines.' Iran's 'resistance,' which emerged as an anti-imperialist and revolutionary Islamist discourse during the revolution and the Holy War and referred to the anti-Israeli and pro-Palestinian axis of Iran, Hezbollah, Syria, and Palestinian groups, retained an obvious Shia component when the Iraqi Shias and Yemeni Houthis were added. On a discursive level, the Islamic Republic systematically abstained from calling this alliance a Shia alliance. However, at the practical level, the Iranian strategy of mobilizing the Shia elements in these countries and legitimizing the prolonged Iranian presence on Iraq and Syria required devising Shia-religious discourses. The next sections will discuss how the discourses of '*takfiri* terrorism' and 'defense of the holy shrines' supplement Iran's 'axis of resistance' policy on the field.

5.5. *Takfiri* Terrorism

By 2014, the Iranian regime had realized that Iran's hopes for Islamic Awakening were greatly hampered by the coup in Egypt and the transformation of civilian uprisings into large scale sectarian warfare. The sectarianization of civil conflicts and the rise of ISIL necessitated Ayatollah Khamenei's discourse to shift away from the issue of a new political order in the Middle East to security. One new discourse that he predominantly used was '*takfirism*.' He used the term consistently in combination with the term 'terrorism,' where the primary security threat to the Islamic communities in the region was dubbed to be '*takfiri* terrorism' (*terorism-e takfiri* in Persian).

Traditionally, the Arabic word '*takfir*' means 'pronouncing an action or an individual un-Islamic.'[792] According to Islamic jurisprudence, the authority to declare any Muslim or their action as un-Islamic lies with the *ulama*. In the modern era though, *takfir* is increasingly adopted by especially Salafist/Wahhabi jihadist groups such as al-Qaeda and ISIL, who declare certain Muslim groups that refrain from paying allegiance to their

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[792] Hassan Mineimneh, 'Takfirism,' *Critical Threats*, October 1, 2009, https://www.criticalthreats.org/analysis/takfirism.

rule and ideology as apostates.[793] In lieu of *ulama*'s jurisprudence to declare apostasy against a person, the Salafi groups acclaim the right to exercise takfirism and administer capital punishment themselves.[794] Accordingly, the Shiite political leadership including Hezbollah and the Iranian regime use the term *takfiri* in referring to Sunni jihadists and extremists especially in Syria today. The main narrative behind this discourse is that the Sunni extremists are dividing the Islamic *Ummah* by their deeds and the Shiites are against in-group fighting.[795] The Iranian regime and Hezbollah employ the term in referring to the activities of the USA, Saudi Arabia, Israel, and the extremist groups they associate with aforementioned countries, who presumably conspire against the Iranian regime, Hezbollah, and Assad in Syria.[796]

In Ayatollah Khamenei's speeches, ISIL is referred to as a *takfiri* terrorist group created by the intelligence agencies of the USA, UK, and Israel with an attempt to divide the Islamic community.[797] According to him, *takfirism* was a policy to pit fellow Muslims against each other in countries such as Iraq, Syria, and Libya and to change the course of the 'anti-American, anti-tyranny' Islamic Awakening movement, which 'managed to make the movement of Islamic Awakening deviate from its path.'[798] He adds;

> '[The Islamic Awakening] was a movement that had been launched by the masses of the people in different countries of North Africa. These countries were against arrogance and America. The takfiri orientation changed the direction of this anti-arrogance, anti-American and anti-tyranny movement. It turned it into a war between Muslims and into fratricide. The front line of fighting in the region was the borders of occupied Palestine, but the takfiri orientation came and changed this front line to the streets of Baghdad, the Jameh Mosque of Syria and Damascus, the streets of Pakistan and different cities of Syria. These places became the front line of fighting. Take a look at the condition of today's Libya, Syria, Iraq, Pakistan and see against whom the

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[793] Noor Zahid and Nafees Takar, 'VOA Explainer: Who Are Takfiri Extremists,' *VOA News,* June 22, 2016, https://www.voanews.com/a/explainer-takfirism/3387691.html.

[794] Mineimneh, 'Takfirism,' https://www.criticalthreats.org/analysis/takfirism.

[795] Aaron Y. Zelin and Phillip Smyth, 'The Vocabulary of Sectarianism,' *Foreign Policy*, January 29, 2014, https://foreignpolicy.com/2014/01/29/the-vocabulary-of-sectarianism/.

[796] Ibid.

[797] Ali Khamenei, 'Leader's Speech in Meeting with Participants of International Congress on Takfirism,' *The Supreme Leader Ayatollah Khamenei Website*, November 25, 2014, http://english.khamenei.ir/news/1985/Leader-s-Speech-in-Meeting-with-Participants-of-International.

[798] Ibid.

forces and swords of Muslims are being used. These forces should have been used against the Zionist regime. The takfiri orientation changed the direction of this fighting to our homes, our cities and our Islamic countries. They cause explosions inside the Jameh Mosque of Damascus. They kill people by causing explosions in Baghdad while they are holding their ordinary rallies. In Pakistan, they fire a volley of bullets on hundreds of people. As you can witness today, they are creating such disastrous conditions in Libya. All of these are among the unforgettable and historical crimes of the takfiri orientation.'[799]

Khamenei specifically emphasizes the 'terrorism' part of this discourse, where he says 'Today, the enemies of Islam have invested in waging domestic wars within nations so that they can pit people against one another with tribal and denominational excuses. […] They falsely refer to the events in Iraq as the war between Shia and Sunni, but this war is the war of terrorism against the opponents of terrorism.'[800] Ali Akbar Velayati, the advisor to Ayatollah Khamenei in foreign affairs, uses the term in referring to 'the extremist groups and organized terrorist groups such as ISIL in Syria and Iraq' which are used by foreign actors 'in a bid to pursue divisive plots and contain or derail the Islamic Awakening movement.'[801] He thus defines such groups primarily 'as a rival force against the Islamic Awakening movement.'[802] Khamenei and Velayati's use of the term suggests that the Iranian leadership resorted to *takfirism* discourse to rationalize the failure of Islamic Awakening in the region. Accordingly, the Islamic Awakening failed because of intra-Muslim conflict, which is, according to Iranian leadership, caused by Sunni extremism created and supported by the West. In other words, the Islamic Awakening could be achieved by 'Islamic unity' between the Sunnis and the Shiites according to this line of thinking, if it were not for foreign meddling.

The Islamic Revolutionary Guard Corps employs the term in a similar way the Supreme Leadership does. However, in the IRGC usage, references to terrorism as a strategic device to beat the 'axis of resistance' is more emphasized. Hossein Dehghan, the

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[799] Ibid.

[800] 'Leader Meets with Families of Martyrs of the 7th of Tir,' *The Supreme Leader Ayatollah Khamenei Website*, June 28, 2014, http://english.khamenei.ir/news/1925/Leader-Meets-with-Families-of-Martyrs-of-the-7th-of-Tir.

[801] 'Iran's Velayati: Islamic Awakening Movement Moving Forward Despite Challenges,' *Tasnim News*, October 22, 2016, https://www.tasnimnews.com/en/news/2016/10/22/1218103/iran-s-velayati-islamic-awakening-movement-moving-forward-despite-challenges.

[802] Ibid.

Commander in Chief of the IRGC, suggests that 'the Zionist regime,' the USA, and 'the terrorist groups such as ISIL and Jabhat al-Nusra' are 'seeking to change the geopolitics of the region.'[803] He refers to the US actions in Iraq and Syria as aiming to 'restore the terrorists' to weaken the anti-terrorist front of resistance.'[804] In a similar fashion, the IRGC depicts 'the axis of resistance' as resisting against terrorism in the region. Besides American presence in the region and the Zionist regime, '*takfiri* terrorism' emerges as the third threat the 'axis of resistance' is resisting against. In this respect, a senior spokesperson of the IRGC said 'It has been five years since the eruption of ISIL terrorism and the presence of a powerful US military in Iraq. What we are seeing is the victory and success of the resistance front, or the front against the Americans and the terrorists.'[805] The IRGC portrays itself as a central actor in the fight against terrorism in Syria and Iraq in this context. Related to this point, Lieutenant General Ali Abdullah Ayoub of IRGC said that the IRGC assistance to Syrian people and regime helped them resist against *takfiri* terrorists.[806] He added 'the unparalleled courage that [the Revolutionary Guards and Qasem Soleimani] have shown are huge triumphs against the Syrian terrorists and [...] we hope that in the course of this process, we will see the continuation of the successes and the final victory of the resistance front.'[807] The IRGC's emphasis on the issue of terrorism is in line with its understanding of national threats in the present era. As discussed before, the IRGC's understanding of national threats and national security is about trans-border security, where the elimination of security threats on the Syrian and Iraqi territories such as the ISIL and other *takfiri* groups will contribute to Iran's security. This also enhances the IRGC's self-acclaimed 'role' in fighting against *takfirism* across the region. In this respect, an IRGC member stated that the Islamic Republic and the IRGC are not only responsible for the protection of its borders, but also for fighting

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[803] See General Dehghan's statement, Former Defence Minister, 'Har eghdame tajavozkarane be Suriye mojebe tashdide bohran ve touseye jang dar mantage khahad shod,' *Sepah News,* May 2, 2017, http://www.sepahnews.com/index.php/sepahnews/item/3622.

[804] Ibid.

[805] The statement of the IRGC, 'Nahadine shodane Esteghlal ve azadi eslami dar keshvar ve darham shekastane khatkeshi soltegar ve soltepazir dar jahan az dastavardhaye jomhuriye-eslami ast,' *Sepah News*, March 30, 2017, http://www.sepahnews.com/index.php/etelaieah/item/3463.

[806] See General Aberomand's statement, 'Estekbar jahani dar sadade rishe kan kardane Eslam dar mantaghe ast/ Suriye piruze miyane mogabele ba godrathaye estekbari ast, az hich komaki be jebheye-mogavemat darig nakhahim kard,' http://www.sepahnews.com/index.php/sepahnews/item/3624.

[807] Ibid.

against terrorism in the region.[808] This shows IRGC's new self-acclaimed 'role' in fighting against *takfiri* terrorism in 'the axis of resistance' countries.

A comparison of the Islamic Republic's *takfiri* terrorism discourse with actual practice on the field shows that the discourse has had a key legitimizing role for the growing IRGC involvement in the Middle East. The Islamic Republic was relatively silent about IRGC involvement in the Syrian conflict until 2014. However, the capture of Mosul by ISIL in 2014 and their increasing presence on the Syrian front opened a room and created a legitimate cause for involvement on the part of the Iranian regime. The focus on 'terrorism' also reinforced the legitimacy the Islamic Republic was seeking. Relying on *takfirism* discourse, the Islamic Republic told the international audience that it is fighting against *takfiri* terrorism that is targeting the Shia communities and places in Iraq and Syria. While the sectarian war both in Syria and Iraq was between Sunni and Shia elements and the Iranian regime seemed to concentrate on the mobilization of the Shia elements in this war, the *takfirism* discourse would also help Iran to bypass any charges on perpetuating a Sunni-Shia conflict in these countries. As a matter of fact, by relying extensively on '*takfiri* terrorism,' Iran was perpetually saying that it was not fighting against the Sunni populations in favor of the Shias, but against those '*takfiri* terrorists,' who were, according to the Iranian regime, Western-constructs to divide the Islamic *Ummah* and to reduce the power of Muslim countries in the region. In that respect, the Iranian regime never framed the Syrian issue as a Sunni-Shia issue, but as a terrorism issue, where it portrayed its involvement as a commitment to solve terrorism and fight against *takfirism* that generated in-fighting within the Islamic community.

In addition to its legitimizing role, the discourse of *takfiri* terrorism helped Iran to unify the Shias around a pressing security issue. The Iranian regime could mobilize the politically and ideologically diverse Shias in Syria and Iraq around the threat of *takfiri* terrorism. As a matter of fact, the increase in the number of Shia armed groups in Iraq and Syria as well as the establishment of paramilitary groups such as *Hashd al-Shaabi* temporally corresponds with the rise of ISIL. In this respect, an IRGC member stated that the unity and solidarity of Islamic forces against terrorist groups within the axis can be

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[808] See General Pakpour's statement, the Commander of the IRGC Ground Forces, 'Biron randane teroristha az marzhaye Iran tanha hadafe ma nist/ be sorage aghabehaye an ha mi ravim,' *Sepah News,* July 20, 2017, http://www.sepahnews.com/index.php/component/k2/item/3989.

employed as a model to achieve unity among all the Islamic *Ummah*.[809] Without doubt, the rise against ISIL and the fight against *takfirism* discourse had the greatest impact on tightening 'the axis of resistance' alliance. Iran, the Lebanese Hezbollah, the Syrian regime, and the Iraqi Shia elements so closely coordinated with one another militarily in the fight against *takfiri* terrorism that the alliance became more consolidated and institutionalized. The IRGC assumed the role of lead coordinator in this alliance as well as a self-acclaimed leadership in fighting against terrorism. Related to this point, a Payam-e Enghelab analysis compared the Iranian fight against terrorism and the US discourse of fighting against terrorism in the Middle East, saying 'The success of the Qods Force in combating terrorism in recent years in Iraq and Syria, and the reinforcement of popular forces in Syria, Iraq and Yemen, has helped decrease the presence of US troops in the region more than any other.'[810]

The 'axis of resistance' has evolved from being primarily an anti-Israeli and anti-US alliance of Iran, Lebanese Hezbollah, and Palestinian resistance to a more encompassing one, increasingly integrating the Iraqi Shia militias and putting Syria at the center of the alliance. Besides the alliance's traditional stance on American involvement in the region and the Palestinian issue, *takfirism* and terrorism became other issues the alliance seemed to resist against. Given the sectarian nature of the security situation and the actors involved, 'the axis of resistance' acquired a more Shiite outlook in its actions over time. *Takfiri* terrorism discourse was intended to offset this outlook in Iran' foreign policy. Nevertheless, this did not mean a total refusal of the discourse of anti-Americanism and anti-imperialism of 'the axis of resistance' alliance. To the contrary, Ayatollah Khamenei always stressed that *takfiri* terrorism is an extension of US policies in the region. In a speech addressed to ambassadors of Islamic countries, he stated that ISIL is an American-created formation.[811] Pointing out to the technical and monetary sources such groups receive, he stated that 'The hand of arrogance has played the largest

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[809] See General Hashem Giyasi's statement, the Commander of IRGC in Fars Province, 'Tarvije farhange Qurani dar sazmanha ve nahadha sababe ertegaye sathe akhlagi ve manavi karmandan mi shavad,' *Sepah News*, June 18, 2017, http://www.sepahnews.com/index.php/ostanha/fars/item/3801.

[810] 'Dar Sayeye Egtedar Solh, (in the shadow of Peace Auhority),' p. 28, http://www.sepahnews.com/images/payam94/payam.pdf.

[811] Ali Khamenei, 'Leader's Speech to Officials and Ambassadors of Islamic Countries on Mab'ath,' *The Supreme Leader Ayatollah Khamenei Website*, May 16, 2015, http://english.khamenei.ir/news/2069/Leader-s-Speech-to-Officials-and-Ambassadors-of-Islamic-Countries.

part in creating terrorism and in strengthening, helping, and supporting terrorists in the region.'[812] He perpetually puts the responsibility on Western and Israeli intelligence units for cultivating terrorism in the region.[813] In another speech delivered at Ahlul-Bayt World Assembly, the Supreme Leader claimed that not only ISIL, but also al-Nusra Front and other takfiri groups were created by the USA, because 'When *taghuti* governments were overthrown in Tunisia and Egypt with Islamic slogans, all of a sudden the Americans and the Zionists decided to use this formula for destroying resistant governments and countries. Therefore, they turned to Syria.[814] Interviewee 8 also emphasized the Iranian resistance to US allies in the region, most notably the Saudi Arabia, as the target of resistance, where he said 'Hezbollah, Assad, Iran considered the revolutionary movement in Syria as weakening the resistance front, [which is] against Israel. Iran thinks that some other countries like Saudi Arabia support this movement in Syria. So, this movement is not original and is supported by foreign countries to weaken the Iranian, Hezbollah, Syrian [axis].'[815]

In short, 'the axis of resistance' both maintains its anti-Americanist stance and increasingly embraces a Shia empowerment aspect in the last couple of years. Majidyar emphasizes the dual nature of this alliance by saying,

'When Iranians talk about the axis of resistance, it mostly means just this alliance of Iran with [regional] state and non-state actors that fight the USA and Israel. If I use the Iranian term, [it is] 'the global arrogance,' which is America, and Zionism, which is Israel. So they don't talk about Saudi Arabia divide, they don't talk about Sunni-Shia divide, they never made this discussion sectarian or a Shiite war against the Sunnis. All the justification is that this is a war, this is a resistance against USA and its allies. And even in Syria or Iraq where there is the war against the ISIL or some proxy wars against Saudi proxies, or even Turkish proxies, they define these proxies not just as Saudi Arabia's. They describe them as an extension of the US and [its] allies. That's why ISIL is described by the Iranian leaders as a group which furthers the US interests in the region. They accuse the USA of supporting

[812] Ibid.

[813] Ali Khamenei, 'Ayatollah Khamenei: American, Zionist and English Intelligence Services Created Terrorism in the Islamic World,' *The Supreme Leader Ayatollah Khamenei Website*, July 7, 2016, http://english.khamenei.ir/news/3997/Ayatollah-Khamenei-American-Zionist-and-English-Intelligence.

[814] Ali Khamenei, 'Leader's Speech to Members of Ahlul Bayt World Assembly and Islamic Radio and TV Union,' *The Supreme Leader Ayatollah Khamenei Website*, August 17, 2015, http://english.khamenei.ir/news/2109/Leader-s-speech-to-members-of-Ahlul-Bayt-World-Assembly-and-Islamic.

[815] Interview with Interviewee 8.

these groups. So, that is the axis of resistance that they are talking about. And another factor they don't talk much about is the Shiite empowerment. As the Shiites in the Arab countries […] are executed. For example in Iraq, which is a Shiite majority country and had been under a very brutal Saddam regime. So now this is the time, they say, that the Shiite nations or communities have to be linked together. They must be allied with each other […] for their own empowerment.'[816]

5.6. Defense of the Holy Shrines

In May 2016, the people of Iran's Mazandaran province gathered in a rally with posters 'From Sacred Defense to Shrine Defense.'[817] The rally was organized to commemorate the Iranian 'martyrs' who travelled to Syria to defend the Shia shrines near Damascus. The rally was attended by IRGC members, the relevant *Basij* units, and local people who carried the posters of Iranian martyrs who lost their lives there. The banner 'From Sacred Defense to Shrine Defense' is quite telling in understanding the transformation of the discourses over the defense of the Islamic Republic. The Sacred Defense, or the Holy Defense of 1980-88, was fought by popular mobilization along Iran's borders. The ordinary people had thus mobilized for the defense of the Iranian state. On the other hand, 'the shrine defense' (*defa az herem* in Persian) narrative pointed to the defense of a different geography – a geography that transcended Iranian borders. The domestic popular mobilization was aimed for a situation that was beyond the immediate defense of the Iranian state: It was for the Shia shrines outside of Iran, most notably in Iraq and Syria.

As discussed, the early IRGC engagement in the Syrian conflict between the years 2011-2013 was portrayed both to the domestic and international audience as intended for 'the defense of the Shia shrines' in Syria. The further *Basij* involvement and the mobilization of Iranian armed forces such as Liwa Fatimiyyoun also rested on the same discourse of defending the Shia shrines. In a meeting with the families of the '7th Tir

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[816] Interview with Majidyar.

[817] Hamed Amirnejad, 'From Sacred Defense to Shrine Defense Gathering,' *Mehr News,* May 25, 2016, https://en.mehrnews.com/photo/116834/From-Sacred-Defense-to-Shrine-Defense-gathering.

martyrs'[818] in 2016, Ayatollah Khamenei also addressed the families of whom he called 'the defenders of the Ahlul Bayt Shrines' – the shrines of the prophet's family and those of Shia Imams in Iraq, Syria, and Iran.[819] In this meeting, he referred to the defenders of the Shia shrines;

> 'Today, we are involved with the issue of the martyrs who defended the Ahlul Bayt (a.s.) shrines. This is one of the astonishing stories of history. During the time of war, we used to encourage youth to go and fight in the arena of war and they would answer our call. Whenever Imam (r.a.) delivered a speech in this regard, a large group of youth would go and join the front lines. But we do not encourage them today. Nonetheless, notice that the determination of these youth from Iran, Afghanistan and other countries is so strong and their faith is so pure that they […] go to a foreign country and foreign soil to fight and be martyred in the way of God.'[820]

Ayatollah Khamenei refers again to *takfiri* terrorism as the main reason for the defense of the holy shrines. However, in Khamenei's discourse, the defense of the shrines in Syria and Iraq are held equivalent to defending the Iranian state and its borders. As a matter of fact, he identifies the threats of terrorism on the Syrian and Iraqi territories as a direct threat to the Iranian state and hence equates the defense of the shrines to 'the defense of one's own city,' where he states;

> 'They created these terrorists in order to defeat the Islamic Republic. Iraq was an introductory step. Shaam [Syria and Levant] was also an introductory step. They were introductory steps towards exerting their influence on our country. However, our power in the country caused them to be defeated there as well. This was their goal. A person who goes from Iran to Iraq and to Syria in order to stand up against these takfiri orientations in the name of defending the Ahlul Bayt's (a.s.) shrines is, in fact, defending his own city. Of course, they do so for the sake of God, but this is the truth of the matter. This is an act of defending Iran and the Islamic community.'[821]

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[818] The 7th Tir bombing was organized by Mojahedeen Khalq in 1981 before the Iran Islamic Republic Party headquarters killing 72 people, a majority of them government officials. Those killed included key revolutionaries and ideologues of the Islamic Republic including Ayatollah Mohammad Beheshti. The bombing was ingrained into the Islamic Republic's history as one of martyrdom for the new regime, where the people were acknowledged as the greatests martyrs of the Islamic Republic. See 'In Remembrance of Tir 7th Martyrs,' *Mehr News*, June 28, 2014, https://en.mehrnews.com/news/103198/In-remembrance-of-Tir-7th-martyrs.

[819] Ali Khamenei, 'Ayatollah Khamenei, Whenever We Relied on Revolutionary Spirit We Moved Forward,' *The Supreme Leader Ayatollah Khamenei Website*, June 25, 2016, http://english.khamenei.ir/news/3965/Ayatollah-Khamenei-Whenever-We-Relied-on-Revolutionary-Spirit.

[820] Ibid.

[821] Ibid.

In a similar vein, the IRGC sources use the 'defense of the holy shrines' in combination with the discourse of *takfiri* terrorism. In this respect, a statement issued by IRGC described the IRGC role as 'supporting Islamic Resistance, especially in the area of counteracting Takfiri terrorism in Iraq and Syria' in alignment with the people, governments, and armies of these countries.[822] The same statement recognizes the IRGC presence in Iraq and Syria for the purposes of the defense of Shia shrines and even commemorates those who became martyrs during the defense.[823] Martyrdom is a crucial component of this discourse. The IRGC-affiliated media gave wide coverage to 'martyrs' who fought in Syria. According to a news article published on Sepah News, Qasem Soleimani is quoted praising an IRGC member who was killed during a fight alongside the Iraqi Badr Forces.[824] One prominent 'martyr' was Mohsen Hojaji, an IRGC member who was captured and beheaded by ISIL while fighting in Syria. Hojaji's 'martyrdom,' his execution by ISIL, and the repatriation of his body via the help of Lebanese Hezbollah received wide public and political attention.[825] In that respect, 'the defense of the holy shrines' discourse served primarily two purposes. First, it legitimated the Iranian IRGC and *Basij* volunteers' engagement across the Iranian borders for a transcendental purpose of defending the Shia shrines against *takfiri* terrorism to the domestic audience. Second, the discourse helped Iran define the borders of security and threats, where the ideological and identity-related borders of Shiism were highlighted. By putting the defense of Shia shrines at the center of its discourse, the Iranian regime also determined and legitimized its scope of military operations across Iran's border.

It should be noted that the Iranian regime does not have a monopoly over 'the defense of the holy shrines.' As a matter of fact, the discourse is used by all 'axis of

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[822] The Statement of the Armed Forces of the Islamic Republic of Iran, 'Sepah Pasdaran Separe Defaei Iran ve Mogavemeat dar barabare nezam solte ve sahyonizm ast,' *Sepah News*, April 20, 2017, http://www.sepahnews.com/index.php/etelaieah/item/3557.

[823] Ibid.

[824] See General Qasem Soleimani's statement, the Commander of Quds Forces, 'Ma dar Iraq sarbaz bi edeaye nellat Iraq hastim / Hashdo-al-shabi shajareye tayebeye ve abo-mahdi shahid zende ast,' *Sepah News*, July 10, 2017, http://www.sepahnews.com/index.php/sepahnews/item/3937.

[825] See 'Iranian Soldier Beheaded by IS in Syria Mourned as an Icon,' *VOA News*, September 27, 2017, https://www.voanews.com/a/iranian-soldier-beheaded-by-is-in-syria-mourned-as-an-icon/4046239.html; 'Mass Funeral Held for Iconic Martyr Hojaji in central Iran,' *Tasnim News*, September 28, 2017, https://www.tasnimnews.com/en/media/2017/09/28/1532474/mass-funeral-held-for-iconic-martyr-hojaji-in-central-iran; and 'Iran Martyr Foundation Extends Condolences on Hojaji Martyrdom,' *IRNA*, August 12, 2017, http://www.irna.ir/en/News/82628600.

resistance' forces. When the Lebanese Hezbollah started to organize the Syrian Shia fighters into armed groups such as Quwat al-Ridha, Al-Ghaliboun, and Liwa al-Imam al-Baqir, their motto was '*Labayk ya Zaynab!*' (At your service, O Zainab!), which refers to the shrine of Imam Ali's daughter near Damascus and thus the protection of this shrine by the Shia fighters.[826] In Iraq, the Iraqi Shia mobilization had gained an impetus in 2014 upon Ayatollah Sistani's *fatwa* calling all Iraqis for armed mobilization for the defense of the holy shrines. In a similar vein, the Iraqi Shia groups who are fighting in Syria today moved across the border to defend the holy shrine of Sayyeda Zainab.[827] Along with the fight against *'takfiri* terrorism' discourse, the 'defense of the holy shrines' helped unite the politically and ideologically diversified Shias of the region against a common security issue. The mobilization and coordination impacts of this discourse helped tighten the relations within 'the axis of resistance' and thus contributed to the consolidation of this alliance. In short, the defense of the holy shrines and *takfiri* terrorism discourses reinforced one another in support of the resistance discourse and policy in the Middle East.

5.7. Islamism or Realpolitik?

Ayatollah Khamenei and IRGC's discourses of Islamic Awakening, popular mobilization, resistance, *takfiri* terrorism, and defense of the holy shrines are clearly Islamist discourses. Among all discourses, the Islamic Awakening, popular mobilization, and resistance are extensions of the Islamic Republic's revolutionary Islamist ideology, which have been transformed at varying levels to fit the historical contexts within which they operate. On the other hand, *takfiri* terrorism and defense of the holy shrines discourses are relatively new constructs. Corresponding to the sectarian nature of the conflicts, mobilization patterns, and alliances, both discourses have Shia overtones. At

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[826] Phillip Smyth, 'Lebanese Hezbollah's Islamic Resistance in Syria,' *The Washington Institute Policy Analysis*, *Policy Watch* 2962, April 26, 2018, http://www.washingtoninstitute.org/policy-analysis/view/lebanese-hezbollahs-islamic-resistance-in-syria.

[827] Patrick Cockburn, 'The Road from Iraq to Damascus: Iraqis Fight to the Death to Defend Shia Shrines - They Show Less Zeal for Assad's Regime,' *The Independent*, December 4, 2013, https://www.independent.co.uk/news/world/middle-east/the-road-from-iraq-to-damascus-iraqis-fight-to-the-death-to-defend-shia-shrines-they-show-less-zeal-8983559.html.

this point, one question is why the central foreign policy discourses the Islamic Republic adopts towards the Middle East are inherently religious. Do the discourses imply that the Islamic Republic following an Islamist agenda? Or are they covers for other foreign policy objectives? As implied in the discussion of each discourse above, Ayatollah Khamenei and IRGC statements on the Middle East do not go without the accompaniment of traditional realpolitik concepts. The data shows the centrality five traditional IR concepts used in referring to Iran's policy in the Middle East: rationality, national security, model, strategic depth, and power. All concepts carefully blend with the five Islamist discourses discussed above.

One issue Ayatollah Khamenei tackles in his speeches is the issue of idealism and rationality. In a speech, Khamenei defines 'idealism' as a basic component of the Islamic Republic.[828] He argues that the Islamic Republic is not to be understood merely as a political structure. Employing a holistic perspective, he says that the Islamic Republic should be understood both as a political structure and 'a set of goals and ideals.'[829] As such, the security of the Islamic Republic not only lies with securing the political structure, but also 'preserving all the values that the Islamic Republic feels committed to, such as justice, progress, spirituality, knowledge, morality, democracy, the observance of the law and idealism.'[830] The identity of the system, its ideational background, and principles are sources of power for the Islamic Republic according to Khamenei, whose protection is required for the holistic security of the Islamic Republic.

When it comes to 'rationality,' Khamenei's first approach to the concept is methodological. He sees using one's reason, i.e. 'reasoning,' as a method to evaluate the best course of policy action by a careful evaluation of historical experience.[831] The keyword accompanying Khamenei's understanding of rationality is 'experience.' Pertaining to Iran's relations with the West, Ayatollah Khamenei points out to nature of bilateral experiences with the West, including the overthrow of the nationalist Mosaddeq

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[828] Ali Khamenei, 'Ayatollah Khamenei: Advocating Tendency Towards the West is not Reasonable and Contrary to Lessons of Our History,' *The Supreme Leader Ayatollah Khamenei Website*, July 2, 2016, http://english.khamenei.ir/news/4014/Ayatollah-Khamenei-Advocating-Tendency-Towards-the-West-is-Not.

[829] Ibid.

[830] Ibid.

[831] Ibid.

government, the missile support to the Saddam regime during the 'imposed war,' extensive propaganda against the Islamic Republic, among others.[832] 'We should use these events as experience,' he says, 'Reason dictates that we respond to them with wisdom and with acumen.'[833]

Content-wise, Ayatollah Khamenei does not see idealism and rationality as two polar opposites. To the contrary, commitment to one's identity, founding values, and principles are deemed to be true rationality. In this respect, Ayatollah Khamenei argues that 'True rationality lies in revolutionary outlook' for the Islamic Republic.[834] That means that a commitment to the central components of this revolutionary outlook should be understood as true rationality. In this respect, 'Rationality means reliance on people. Rationality means reliance on domestic forces,' he says.[835] In line with this, relying on and promoting 'popular mobilization,' despite the ideological and religious content of the discourse, becomes true rationality. His take on the related concept of 'national interest' is no less similar, where he does not see 'national interest' and the 'revolutionary identity of the people of Iran' as two polar opposites.[836] Addressing at governmental officials in 2017, he clearly underscores this point;

> 'National interests are national interests only when they do not disagree with the national and revolutionary identity of the people of Iran. Interests become national only when they are not in conflict with national identity. Otherwise, when we consider something as a national interest which causes national identity to be trampled upon, we have certainly made a mistake. […] One of the greatest achievements of the Islamic Revolution was that it defined an identity for the people and that it insisted on it. It derived national interests from that identity. The Revolution portrayed, confirmed and pursued national interests on the basis of that identity.'[837]

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[832] Ibid.

[833] Ibid.

[834] Ali Khamenei, 'Officials should not Set Themselves the Goal of Satisfying Arrogant Powers, They should Satisfy the People,' *The Supreme Leader Ayatollah Khamenei Website*, June 4, 2017, http://english.khamenei.ir/news/4901/Officials-Should-Not-Set-Themselves-the-Goal-of-Satisfying-Arrogant.

[835] Ibid.

[836] Ali Khamenei, 'Everything in Conflict with Our Islam, Our Revolution, Our Rich Historical Background is not Part of National Interests,' *The Supreme Leader Ayatollah Khamenei Website*, June 12, 2017, http://english.khamenei.ir/news/4925/Everything-in-Conflict-with-Our-Islam-Our-Revolution-Our-Rich.

[837] Ibid.

In the same speech, 'Our Muslim nature, historical depth, and our revolutionary quality are three main elements that constitute the identity of the people. We should not keep these three elements out of sight,' he says.[838] The Islamic identity and revolutionary ideology constitute the national security of the Islamic Republic among others.

Besides rationality and national interests, the Islamist revolutionary ideology that fashions the state identity of the Islamic Republic also determines the very Iranian 'power.' In Khamenei's understanding, idealism is power. In this respect, the revolution itself, 'the revolutionary spirit,' and revolutionary ideology becomes the source of power and influence in diplomacy which should be strictly preserved;

> 'Elimination of ideology" is one of the ideas that they have put forward recently. It existed for a few years and later on, it was cancelled for a few years, but now they have begun it again. They say, "We should eliminate ideology from diplomacy and domestic policy." But this is the exact opposite of the truth. This means that we should not involve the principles of the Revolution and Islam in domestic and foreign policy. How should we not involve them? These policies should be formulated on the basis of these principles. The same is true of other areas. Well, what does a revolution do? What a revolution does in the beginning is to lay out ideals. It lays out ideals. Of course, lofty ideals are not changeable. Tools and instruments are changeable. Daily developments are changeable, but those principles that form the main ideals are not changeable. Well, these two premises contradict each other because this power and influence originate from the Revolution. If it were not for the Revolution, the revolutionary spirit and revolutionary actions, this influence would not exist. When they say, "Now that you are influential and powerful, you should abandon the Revolution so that we can live together"- this means that we should abandon the Revolution. And when we do so, we will become weak and they will be able to swallow us.'[839]

In addition to revolutionary ideology, another strong element of power in Ayatollah Khamenei's speeches is revolutionary institutions, i.e. Iran's ideological security forces and security culture based on popular mobilization. He specifically highlights the IRGC and *Basij* as strong components of Iranian power;

> 'The elements which make the country powerful – the Armed Forces, the Islamic Revolution Guards Corps, Basij and pious and hezbollahi individuals

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[838] Ibid.

[839] Khamenei, 'IRGC Blocks the Enemy's Infiltration,' http://english.khamenei.ir/news/2155/IRGC-blocks-the-enemy-s-infiltration.

– should be preserved. I will tell you that the people who risk their lives, who stand up against the enemy in different areas, and who endure hardships are pious, revolutionary and hezbollahi elements. It is these individuals who stand firm. Therefore, they should be preserved.'[840]

In the same speech, he openly states the centrality of these 'power elements' in regional issues as well;

'The officials of the country should help these elements in different areas – in universities, and in industrial, scientific and public service areas. If the enemy dislikes the Islamic Revolution Guards Corps, well, this is clear! Do you want America to like your Quds Force? Do you expect the US to like such and such a Sardar who is active in this area? Well, it is clear that he does not like him! It is clear that he sets terms in different areas. Well, he wants us to be deprived of elements of power. This is like saying that your wrestling team can participate in international competitions provided that two, three star wrestlers of yours are not included in the team. What does this mean? It means that you should participate for losing. They say, "We let you enter international competitions. You can come in order to lose." This is what it means. When they say that the condition for such and such a thing to happen is that the Islamic Revolution Guards Corps should not be involved and that Basij should not interfere on such and such an issue –for example on regional issues – this is what it means.'[841]

Not only the security institutions, but also the Iranian security culture that relies on the Islamic and Shia concepts and narratives of *jihad,* sacrifice, martyrdom, and resistance are the real sources of 'power' in Khamenei's foreign policy discourse. Addressing to Imam Khomeini University students in a 2017 speech, he underscores the centrality of these Islamic concepts and narratives in augmenting Iran's power;

'Self-sacrificing military personalities are a source of power as well. As well as military organizations, a self-sacrificing individual, a Sayyad Shirazi, a Shahid Shushtari and a self-sacrificing individual who is a military personality and who is altruistic and honest is the target of their rage and grudge. These personalities were not martyred in the war, rather they were assassinated. In other words, they were identified, chased and assassinated because they showed themselves as an obstacle on the way of the enemy's transgressions and because they were a source of power for the country. So, they show enmity towards such personalities as well. The spirit of jihad and resistance in a nation is one of the sources of national power as well. That is

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[840] Khamenei, 'Everything in Conflict with Our Islam, Our Revolution, Our Rich Historical Background is not Part of National Interests,' http://english.khamenei.ir/news/4925/Everything-in-Conflict-with-Our-Islam-Our-Revolution-Our-Rich.

[841] Ibid.

why they are opposed to the spirit of jihad and resistance. In the colonialist discourse, they accuse the spirit of resistance and jihad of violence. They accuse it of violence and extremism. Unfortunately, we sometimes learn these phrases from them and repeat them inside the country. This is because the spirit of jihad and martyrdom is a source of power for every country.'[842]

Khamenei's discussion of rationality, national security, and power suggest that the religious foreign policy discourses employed towards the Middle East region are not separate from these traditional IR concepts. To the contrary, these religious discourses are in line with and part and parcel of the Islamic Republic's understanding of rationality, national security, and power today. If commitment to the revolutionary ideology and identity is a source of power for Iran, so is supporting the Islamic Awakening movement in the region. If reliance on people and domestic forces has proved to be true rationality in the Iranian experience, so is promoting the idea and organizational model of popular mobilization among Shias against Salafist/Wahhabi jihadism in the region. A clear overlap is traceable between ideological and rational factors in Iran's foreign policy in the Middle East today. The keyword again is 'experience.' Iran's revolutionary experience of 1979, its experience in popular mobilization during the Holy Defense, and its consolidated security culture are observed to be true rationality in the Islamic Republic's foreign policy. In a historical context where the region is swept by civil-sectarian conflict, the domestic political order has decayed, state institutions have almost failed, and regional power balances have shifted, and the Shias have gradually achieved political empowerment, all the Islamic discourses the Islamic Republic is adopting towards the Middle East, all of which are about the Iranian 'experience' in some way or another, are a source of power and influence in the region. This is well-proved with two additional foreign policy concepts encountered in the statements of Iran's political and security establishment extensively: Iranian experience as 'a model' or 'inspiration' for the Middle Eastern nations and Iran's 'strategic depth' in the region.

As discussed in relation to Islamic Awakening, popular mobilization, and resistance discourses, the concept of 'Iranian model' is widely used and emphasized by the Iranian leadership and IRGC members. The Islamic Awakening is portrayed by the Supreme Leader as an alternative political model to be emulated by those rallying on the

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[842] Khamenei, 'The Enemy Wants to Take Away Iran's Deterrent Power, Ayatollah Khamenei,' http://english.khamenei.ir/news/4807/The-enemy-wants-to-take-away-Iran-s-deterrent-power-Ayatollah.

Arab street, while the IRGC generals took pride in the Iranian *Basijis* for being an organizational model for *Hashd al-Shaabi* in Iraq. In an interview with Sepah News on the achievements of the Islamic Revolution of 1979 so far, the Supreme Leader's representative in IRGC, Hojjatoleslam Ali Saeedi, directs the attention to the Iranian governance model, resistance model, and *Basiji* culture model.[843] He argues that the Islamic Revolution introduced an intellectual system of Islam to the world of Islam, which is 'a governance model based on religious democracy against Western liberal democracy.'[844] He proposed the Iranian resistance as a second model in the region, which, according to Saeedi, has 'revolutionized the resistance in Lebanon, Palestine, Iraq and Syria' and changed the regional power equations in favor of Iran and these countries.[845] Saeedi portrays 'the *Basiji* revolution' of Iran as the third model, where the Islamic Revolution could 'instill and institutionalize the *Basij* culture in Lebanon, Iraq, and Syria' and 'exported [the *Basiji* culture] to the region.'[846] Finally, the 'Iranian model' is well-connected to Iran's self-portrayed 'strategic depth' in the region. According the Iranian leadership, the revolutionary ideology, the revolutionary spirit and actions, i.e. 'to remain revolutionaries,' is the source of 'Iranian influence, power, and strategic depth that [they] have in the region and among regional nations.'[847] On a more practical level, the Islamic Republic measures its strategic depth in the region by the so-called 'back-up' groups in some countries.[848] As such, the pro-Iranian Shia armed groups in Iraq and Syria, the organizational model of *Hashd al-Shaabi*, and the *Basiji* culture are considered to be the manifestations of Iran's 'strategic depth' in the region. Religious ideology, Shia identity and Shia narratives constitute the infrastructure of Iran's strategic depth in the Middle East.

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[843] Hojjat-al-Eslam Saeedi, 'Enghelabe Eslami Talieye Ehyaye Tamadone Eslami,' http://www.sepahnews.com/index.php/goftogo/159.

[844] Ibid.

[845] Ibid.

[846] Ibid.

[847] Khamenei, 'IRGC Blocks the Enemy's Infiltration,' http://english.khamenei.ir/news/2155/IRGC-blocks-the-enemy-s-infiltration.

[848] Khamenei, 'Without a Doubt, Islam is a Demolisher of Oppression and Arrogance,' http://english.khamenei.ir/news/3871/Without-a-doubt-Islam-is-a-demolisher-of-oppression-and-arrogance.

5.8. Conclusion

This discourse analysis shows that the Islamic Regime's discourses go hand in hand with Iran's evolution of the Middle East policy. Accordingly, the Iranian shift of focus from the political sector to the security sector is reflected on the choice of the discourses as well. The 'Islamic Awakening' is a case in point, which was extensively used by the Supreme Leader after 2011, but was gradually dropped after 2013, when the hopes for the formation of Islamic governments in the Arab Spring dimmed. Then the discourses shifted towards the security area, with 'popular mobilization,' 'resistance,' and '*takfiri* terrorism,' and 'defense of the holy shrines' at the center.

It should be noted that all discourses discussed above are Islamist. The 'Islamic Awakening,' 'popular mobilization,' and 'resistance' refer to the Islamic Revolution, the Islamist revolutionary ideology, and the Iranian model of mobilization. Moreover, these discourses inherently reflect the same revolutionary logic: 'the export of the revolution.' The Iranian leadership inherently refers to the transformations in the region with the discourses of 'Islamic Awakening,' 'popular mobilization,' and 'resistance' as a revolutionary Islamist moment. Nevertheless, the Iranian leadership does this without dubbing the phrase 'export of the revolution' in any way. Moreover, with the changing circumstances, the military aspects of these terms are featured more and the political aspect is featured less. The content of the terms is reworked to fit Iran's evolving foreign policy logic. Finally, the addition of two discourses, '*takfiri* terrorism' and 'the defense of the holy shrines,' highlight the Shia element in the regime's Middle East policy discourse. This is also in line with the growing Iranian engagement with Shia mobilization in the region. All in all, Iran's 'Axis of Resistance' policy diverges from the 'export of the revolution' policy with its increased focus on the security and military sector and on the Shia communities as opposed to the whole *Ummah*.

What does the discourse analysis tell us about the role of religion in Iran's foreign policy under the 'Axis of Resistance'? Ayatollah Khamenei's speeches also show that he does not use the Islamist discourses as distinct from the more 'realpolitik' discourses. His understanding of 'rationality' is not separate from the revolutionary Islamist ideology of the regime. He thinks that Islamic Republic's ideology is true 'rationality' and the true

source of 'power.' In a similar vein, he thinks that Iran's revolutionary institutions are a source of 'power' and that Iran's relations with the Shiites via IRGC-led Shia mobilization activities reflect Iran's 'strategic depth' in the region. As such, the Iranian regime neatly amalgamates the ideological elements with rational factors. As the previous chapters showed, the Iranian regime's engagement with the Shiites in the region is an institutionalized foreign policy. The name of the policy changes, and so does its extent and nature. Nevertheless, the institutionalized role of religion as a mobilization tool, the use of Shia Karbala narratives, and Iran's reliance on its peculiar security institutions and culture remain the same. These religious elements become a source of power for the Islamic Republic, to be employed under right conditions.

CHAPTER 6

CONCLUSION: EXPORT OF THE REVOLUTION' VS.
'AXIS OF RESISTANCE'

6.1. Overview of the Research Motivation, Questions, and Hypotheses

When this research started in 2014, the Islamic Republic appeared to be following a very pragmatist path towards moderation and integration with the international community. The former nuclear negotiator and pragmatist politician Hassan Rouhani had won a landslide victory over his hardliner predecessor Mahmoud Ahmadinejad in 2013 presidential elections. The Iranians seemingly had brought the moderate and pragmatist leader Rouhani for a specific mission: Rouhani would use his diplomatic experience as the nuclear chief negotiator of the Islamic Republic for the resolution of the prolonged nuclear crisis with the Western community and get the international sanctions lifted, where the long-interrupted oil sales would be resumed and the Iranians would finally leave behind the economic depression, unemployment, and inflation they were experiencing for a long time. As a matter of fact, Rouhani accomplished his mission and signed the historic JCPOA with the P5+1. As a result, the sanctions were gradually eased, President Rouhani negotiated for prospective investment opportunities with foreign banks and companies, and oil sales were resumed as expected. After Ahmadinejad's strong push for Iran's nuclear rights in the international arena, the international community interpreted the Iranian move to temporarily forsake its nuclear right under Rouhani's government as a sign of distancing away from revolutionary ideals, gradual regime moderation, and of demands for integration with the international system. JCPOA and associated

expectations for moderation in Iran's internal and external policy remained as the focus of foreign policy analysts and Iran experts.

Without doubt, there is an element of truth in this analysis. President Rouhani has followed a foreign policy that is a reconciliatory foreign policy in interacting with the international powers at the international level. Nevertheless, a reverse foreign policy pattern accompanied Rouhani's reconciliatory foreign policy in the matters pertaining to the Middle East region and it was not moderate at all. The 2003 US invasion in Iraq had precipitated a series of political transformations in the region, which achieved a momentum in 2011 with the Arab uprisings and the civil wars across the Middle East. The Iranian regime responded to the shifts in the regional power balances and the sectarianization of conflicts with quite an assertive foreign policy strategy. By 2014, the Islamic Revolutionary Guards Qods Forces – which was originally tasked with the export of the revolution during 1980s - mobilized an extensive network of pro-Iranian Shia militias in Iraq, sent Iranian *Basij* volunteers to fight in Syria, cooperated with Lebanese Hezbollah in mobilizing a small of number of Shia villages to fight against domestic opponents in Syria, and moved the pro-Iranian Iraqi proxies to Syria to fight alongside the Assad regime. Iran's Middle East policy relied heavily on the political and military mobilization of Shias across the region. Iranian political and military elites invoked a heavily ideological discourse with strong references to the Islamic Revolution and Shia symbolism accompanying its strong military activism in the region.

The sectarianization of the civil conflict in Syria generated a brief moment in the region where regional powers seemed to ally along sectarian lines on the conflict. Nevertheless, by 2015, the Sunni powers were marked by intra-sectarian divisions due to their differences in political ideology, thus were far from acting like a unified block on the domestic political reconfiguration of Syria. While far from being a politically united front, the Shias of the region exhibited a considerable unity, where the Lebanese Hezbollah, pro-Iranian Shia militias in Iraq, the IRGC - Qods Forces, and the Assad regime have achieved a strong military coordination and mobilization capacity. The IRGC referred to the now predominantly Shia alignment ranging from the Lebanese Hezbollah and the Assad regime in Syria on the West to the Shia-dominated government in Iraq and Iran on the East and in some accounts down to the Houthis in Yemen as 'Axis of Resistance.' The 'Axis of Resistance' originally reflected the Islamic Republic's ideological attitude on the Israeli-Palestinian issue in the 1990s, but the content and the

referents of the concept has tremendously grown in the recent years to cover the ongoing Shia empowerment across the region. Religion seemed to have a substantial centrality in the Middle East policy. A common sectarian identity seemed to characterize the parties to the alliance, Shia narratives of Karbala accompanied the mobilization strategy, and the Shia security formations accompanied the process. Although Iran was following a reconciliatory foreign policy on the Western front, no moderation was in horizon on the Eastern front. When this research started in 2014, Iran's Middle East strategy thus resembled 'the export of the revolution' policy of the first revolutionary decade.

The above-described dilemma motivated the research questions this thesis tried to answer: Why does Iran pursue a foreign policy with distinct religious and ideological contours in the post-2003 Middle East, despite the observed pragmatism and rationalism in relations with the West during the same period? What role does religion play in Iran's 'Axis of Resistance' policy? Given the centrality of 'religion' both in the transnational politics of the Middle East region as well as in Iran's foreign policy, this research relied on an emerging literature in International Relations Theory which aimed to merge the study of 'religion' into established IR paradigms. Three hypotheses were put forward in this respect, each representing the realist, liberalist and constructivist IR traditions:

Hypothesis I: Iran is caught up in a regional power game since 2003, where the regime instrumentalizes religion to become the regional leader.

Hypothesis II: Iran's religious foreign policy in the Middle East reflects the ongoing factional balances tipping towards regime hardliners in domestic politics.

Hypothesis III: Iran's Islamist revolutionary ideology leads to an ideological and religious policy in the Middle East.

In line with these hypothesis, this research has generated two sets of conclusions. The explanatory power of each hypothesis over the Iranian case will be discussed in relation to these two sets of conclusions: 1) the role of religion in Iran's foreign policy since 1979 and 2) Iran's 'Axis of Resistance' policy today.

6.2. The Role of Religion in Iran's Foreign Policy since 1979

One main conclusion that this research has generated relates to the concept of 'religion,' which crudely refers to a transcendental faith system, as used in politics and international relations. When used in international politics, the concept of 'religion' transcends its meaning as a specific faith system and a doctrine that is manifested by a holy book, written codes, narratives, and traditions. That does not mean that the doctrine is irrelevant to politics, it does play a role. However, when talking about religion and politics, one means the practical implications of religious doctrine on non-religious spheres of life including the politics, economics and society through human interpretation of religious faith and doctrine. The concept of religion as used in this sense is closer to the concept of 'public theology' as discussed in Chapter 2 of this thesis. The historical, temporal, and spatial dimensions within which the religious faith and doctrine influence the ideology, institutions, actors, and political interactions matter. Such a conceptualization takes the religious faith out from its static nature and gives it increased dynamism. Such conceptualization of religion also opens a richer space for us to discuss and understand the various political manifestations of religion. This explains the multiple forms of 'political Islam' as mentioned and implied elsewhere in this research. Politically activist Shiism is only one type of political Islam among a plethora of Islamist political movements across the region. Wahhabism is another form of political Islam shaped in the Saudi context, while electoral Islamism in Tunisia and Turkey is yet another. The Iranian style political Shiism institutionalized as *velayet-e faqih* is also different from Sistani's understanding of politically quietist Shiism. Even when one examines the variety of Islamist jihadist groups in Syria, Libya, and Iraq, one will see that they all entertain different ideas about the proper religio-political order as well as the tools and mechanisms for establishing this order. This variety is the result of different interpretations as well as political, social and legal necessities informing such interpretations at a specific time and place.

This thesis has employed such an understanding in examining the role of religion in the Islamic Republic's foreign policy. Chapter 3 paid scholarly attention to the question of how religious faith manifested itself in the ideological, institutional, and political configuration of a regime at a specific time. As for the Islamic Republic, a scholarly work

on Iranian politics should devote sufficient time in understanding the contours of politically activist Shiism, i.e. how long-accumulated intellectual and religious inputs formed the basic tenets of the activist, revolutionary, Shia ideology of the Islamic Republic, its institutions, actors, and power centers. The Islamic Republic of Iran was the culmination of a politically activist Shia movement across the region in a Shia theocracy in a nation-state. There was a vast intellectual history behind the religio-political movement leading to the Islamic Revolution in Iran, spearheaded by Shia clerics in traditional Shia *hawzas* of Iraq and Iran, lay intellectuals, Shia political actors, and activists. This political and intellectual background not only shaped Iran's mode of existence after the revolution, but also its mode of interaction with the greater political movement it came from. Religion thus stood out as a multifaceted concept in Iran's foreign policy towards the Middle East, impacting the various facets of foreign policy making. An analysis of Iran's foreign policy helps us deconstruct this multifaceted concept and understand in what ways religion plays a role in Iran's foreign policy.

Religion as Ideology. The first facet of religion as a multifaceted concept relates to the 'ideology' aspect of religion. Research showed that the intellectual background of the Islamic Revolution has generated a multilayered political identity merging multiple intellectual and political traditions. In this respect, the revolutionary ideology of Iran since 1979 can be defined as a careful and innovative blend of anti-imperialism, anti-liberal and/or Islamic modernism, revolutionary Marxism, and politically activist Shiism. This thesis employed the commonly used 'Revolutionary Islamism' in referring to this creative blend. This research has shown that religious ideology has played into the general foreign policy stance of the Islamic Republic on the questions of the international system, international organizations, and leadership. The ideology has also defined the Islamic Republic's relevant foreign policy terminology on the enemy (*kufr, bughat*), the defense logic (*jihad*) and mobilization strategy (*shuhada*).

Religion as Identity. The Islamic Republic's ideology of 'Revolutionary Islamism,' accompanied by Shiism, became a state identity after 1979. As the analysis showed, revolutionary Islamism and *velayet-e faqih* have become a brand mark for Iran. This identity helped the Iranian regime to rationalize its anti-systemic and revisionist mode of existence during the first decade and perpetuated its self-acknowledgement as a 'inspirational model' both for the Shias, who have historically been political minorities

in most countries across the Middle East, and for similar Sunni political movements. During the first decade, the Islamic Republic emerged as an inspirational model of 'revolution' for the Islamic *Ummah*, where the regime portrayed itself as an exemplary model and patron of 'Shia empowerment' across the region. Both the Shia theocracy and revolutionary Islamism constituted the identity of the regime and also had strong ramifications on foreign policy.

Religion as Shaping the Regional Ontology. As discussed in the introduction and the theoretical chapter of this thesis, one predominant assumption shared by all international relations paradigms is that the international system is based on Westphalian principles. In the Westphalian system, autonomous, territorially distinct, and sovereign states are the primary actors of the international system. The IR discipline has traditionally evolved as a field investigating the political, military, and economic interaction among these autonomous and territorially distinct political units, where religion was restricted to the domestic realm. Previous research has convincingly shown that the international and regional orders are far from such an idealized and neat description. The Middle East region had always been characterized by super power penetration following World War I, where the mandate system and artificial borders have traditionally complicated the question of allegiances across religious, sectarian, ethnic, and national lines. The transformation of the regional order since 2003 and that of domestic political order since 2011 only aggravated this characterization. Today, the Middle East region is identified by weak state institutions, where religious and sectarian allegiances often transcend national borders. The authority of Shia clerics and *hawzas* in Iraq, Iran, Lebanon, and Gulf countries is not restricted to national borders. Despite political and ideological differences, the Iranian regime is predominantly seen as a political patron by Shia political movements across the region. Shia clerics, the Iranian regime, Shia political parties, armed groups, and security institutions interact in network-type relationships that transcend national borders across the region. The Iranian regime designs its foreign policy within such a regional ontology, characterized by the increased role of religious actors.

Religion as Institution. The Islamic Republic is an Islamic state-building project. The religious identity, ideology, and the early internal and external experiences of the Islamic Republic have been gradually institutionalized over the past 40 years, thereby

informing the political, security, economic institutions of the Islamic Republic. In the foreign policy realm, religion has played the greatest role in the Islamization of security institutions. The experiences of the Holy Defense War and 'export of the revolution' have transformed the small revolutionary militia into a peculiar ideological army called the IRGC. The post-revolutionary period witnessed the evolution of the IRGC along with its paramilitary wing *Basij* as a significant economic, social, and political force over the Iranian regime. The IRGC-Qods Forces' involvement in post-2003 Iraqi politics as well as the Syrian and Yemeni conflicts along with the *Basij* reflects the growing power of these ideological security institutions in Iran's foreign policy.

Religion as Capability and Power. It should be noted that both the IRGC and *Basij* are unconventional forces, pursuing unconventional political and military strategies in implementing Iran's external policies. Both constitute the Islamic Republic's unconventional capabilities. During the first decade of the revolution, a primary role of the IRGC was the mobilization of ideologically like-minded Shiites in relevant countries. Shia narratives of Karbala, martyrdom, and sacrifice played a crucial role in boosting the mobilization process. The same mobilization strategy is underway since 2003. The research has shown that the IRGC and the *Basij* have mobilized the Shias in Iraq and Syria and contributed to the establishment of security institutions organizationally modelled on the Iranian security forces. The Supreme Leader Ayatollah Khamenei's speeches, the IRGC commanders' own accounts and the foreign policy experts' accounts interviewed for this research all converge on the idea that the IRGC and *Basij* model is a significant source of power for Iran. Both constitute the hard power capabilities of Iran , albeit in an unconventional manner. Nevertheless, both the primary and secondary data sources show that the Iranian foreign policy makers see this capability as an inalienable and integral asset for Iran's foreign policy.

Religion as Shaping the Foreign Policy Interests and Objectives. Finally, the research has shown that revolutionary Islamist ideology and the Shia identity have determined Iran's self-ascribed transnational duties, interests, and objectives. Iran's central self-ascribed transnational role is being the patron of the Islamic *Ummah* and of Islamic independence movements in the region. The Islamic Republic's transnational interests and objectives thus include protecting the Muslim community against the

regional policies of the 'global arrogance,' being an 'inspirational model' for other Islamist movements, and providing support for these movements.

In short, religion matters in Iran's foreign policy and it does so in multiple ways. Nevertheless, it should be noted early on that not all facets of religion matter in the same manner in Iran's foreign policy across time. What is noteworthy is that most research analyzing Iran's foreign policy behavior on the ideology - rationality pendulum inherently focus on only one area religion impacts: the foreign policy interests and objectives. If Iran is observed to move away from revolutionary Islamic and ideological principles/interests/objectives for the sake of economic and power-related interests/objectives, the regime's foreign policy behavior is coded as 'rational.' On the other hand, if the regime is following the principles and transnational interests associated with its revolutionary Islamist identity and ideology, the foreign policy is coded as 'ideological.' What this research shows us that a mere reliance on the nature of interests/objectives is insufficient to understand the nature of Iran's foreign policy. We should instead examine the relative relevance of each facet of religion discussed above.

A quick look at all six facets of religion discussed above reveals that the role of religion as ideology and state identity are constants. Forty years after the revolution, both the ideology and the identity are still the *raison d'etre* of the Iranian regime. The revolutionary Islamist ideology, with its anti-imperialistic and revolutionary components, the Shia identity, and *velayet-e faqih* have remained to be relevant across time. Despite relative changes in the foreign policy behavior, the key foreign policy discourses and terminology associated with the state ideology and identity are still there as well. As a matter of fact, even after the historic nuclear deal was negotiated and signed and a relative rapprochement with the USA was achieved, the Supreme Leader and Iranian diplomats continued using the terms 'global arrogance' and 'the Great Satan' in referring to the USA. Chapter 5 on foreign policy discourses has shown that the Islamic Revolution is still a brand mark for Iran, where the Iranian regime still self-ascribes the role of being the patron, inspirational leader, and supporter of similar movements in the region. The 'Islamic Awakening' and 'resistance' that dominated the leadership's discourses after 2011 are a direct reflection of this very identity and ideology. In that respect, there is an observable continuity in the role of religion as an identity and ideology in Iranian politics,

with implications on Iran's self-ascribed roles, duties, and discourses in the foreign policy realm.

While the identity and ideology have remained as constants, the role of religion as shaping the regional ontology, as institution, capability and power has not only remained there, but also increased tremendously over time. Ontologically, the transnational religious networks have never been as consolidated during the last forty years as today. The Iranian leadership sees the Lebanese Hezbollah as the only Iranian achievement in exporting the revolution. The Iranian regime could fully use the civil war and state weakness in Lebanon to its advantage and create a politically strong and friendly Shia player inside Lebanon that started to behave like an ideological army performing transnational military operations on its own against ideologically defined enemies such as Israel and '*takfiri* terrorists' today. There is an inverse relationship between the strength of horizontally-organized transnational religious networks and state strength in the Middle East. Since the decline of the Ottoman rule in the Middle East, when nation-state institutions are strong, the dormant religious networks are weak. When there is a near state failure accompanied by foreign intervention and/or civil conflict, the dormant religious networks are the first to mobilize and dominate the political scene. Foreign intervention, civil war, the shifts in the domestic political order have led to a rapid erosion of state institutions and capacity in Iraq and Syria. As a result, a plethora of Sunni Islamist political movements, Shia clerical centers, and transnational Shia armed groups emerged as potential political authorities serving the political, social welfare, and security needs of the populations, thereby making up for the state failure in their home countries. Transnational religious allegiances and patron-client relationships marks the functioning of these networks, where some groups pay allegiance to another Islamist umbrella organization operating across nation-state borders, sub-state actors ally with a state patron other than their own, and complications abound concerning the populations' dual allegiance to ethnic, religious, and sectarian authority and the nation-state authority at the same time. Iran's foreign policy since 2003 corresponds to such an ontology in the region. The Iranian regime has capitalized on this very regional ontology, characterized by increased relevance of sectarian and religious identities and of Shia clerical centers. As Majidyar argued when interviewed, one factor that has helped Iran to mobilize the Shias in Lebanon in 1980s, then in Iraq after 2003, and finally in Syria after 2011 was the erosion of state capacity in these countries, which 'provided the ground for Iran to come

and gain a foothold there.'[849] In other words, the new regional ontology and systemic changes shaped the Iranian assertiveness in the region. This point was emphasized by interviewees referred to in Chapter 4, who share the proposition that the Iranian regime's military activism in the region was a reaction to regional transformations.

Without doubt, the external changes were not the only reason for Iranian military assertiveness and domestic factors were equally important. However, these domestic factors do not relate as much to leadership changes and domestic factional politics as to the increased institutionalization of Iran's security establishment. A reality commonly-recognized by foreign policy experts interviewed for this research is the rise of IRGC as an important player in Iranian politics. This peculiar Islamic army and its paramilitary wing *Basij* have become more experienced, institutionalized, and powerful since their initial formation as volunteer-based popular mobilization forces in 1980s. The Karbala narratives, discourses of *shuhada*, martyrdom, sacrifice associated with the IRGC's mobilization strategy were already the central ingredients of the 'Ashura culture.' However, the *shuhada* discourse has become increasingly institutionalized by the efforts of Martyrs Foundation, IRGC-related media and propaganda outlets, and *Basij* themselves. Both during the mobilization of the Shiites and the reconstruction of Iraqi and Syrian security establishments, the IRGC and *Basij* were promoted as an Iranian security brand mark by the leadership and the IRGC.

In the recent years, there is an internal concern over the increasing economic and political empowerment of the IRGC at home. Nevertheless, the internal politics seem to agree on the military empowerment of the IRGC in external operations. The Iranian political scene has seen three leadership changes since 2003 when Iraq was invaded: the reformist president Khatami, the hardliner president Ahmadinejad, and the moderate pragmatist president Rouhani. Despite the internal leadership change, the IRGC's involvement in Iraqi and Syrian political and military affairs remained as constant. The Supreme Leader and the presidents have seen the IRGC as a source of power in the region serving the Islamic Republic's regional interests and have supported their external presence despite factional concerns over the increasing economic and political power of the IRGC at home. This point rules out the liberalist hypothesis put forward for this

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[849] Interview with Majidyar.

research, which argued that Iran's religious foreign policy in the Middle East reflects the ongoing factional balances tipping towards regime hardliners in domestic politics. First, as discussed in Chapter 4, Iran's foreign policy in the Middle East is decided by the Supreme Leader and implemented predominantly by the IRGC. Second, the military activism has remained as constant despite the presidential leadership changes and factional politics. Therefore, we can conclude that factional politics is not a reason for increased relevance of religion in Iran's Middle East policy today.

If the liberalist hypothesis is ruled out, what are the explanatory power of both realist and constructivist accounts in understanding the increased relevance of religion in Iran's Middle East policy today? The central conclusion to be derived from this thesis is that certain facets of religion have become institutionalized in Iran's foreign policy. The institutionalization of religion in Iran's foreign policy has been in concordance with the Islamic state building since 1979. As the analysis above showed, religion has either remained as a constant or increasingly influential in foreign policy as ideology, identity, institution, capability, and power. These four domestic facets of religion have been increasingly institutionalized in foreign policy. Besides, religion as ontology has become remarkably relevant as an external factor determining Iran's foreign policy. On the other hand, this research does not conclude that religious interests and objectives are constant. To the contrary, foreign policy interests and objectives change, are redefined, and are reformulated in accordance with the methodological realism of the Iranian regime, which carefully analyzes the historical context internally and externally, calculates the national interests, and determines the objectives. Merely focusing on a state's foreign policy interests and objectives in terms of the role and influence of religion leaves out other important facets of religion discussed above. As such, it theoretically leaves us in an unbreakable loop running between the ideological and realist poles.

In line with this, recognizing the religious aspect of Iran's foreign policy and putting more effort on understanding how religion plays a role in determining the basic behavioral and discursive components of Iran's Middle East policy might be scholarly more illuminating than questioning the real motivations behind it. There is a wide range of disagreement about 'the real motivations' of Islamic movements or sectarian divisions not only among outside observers paying allegiance to the 'political' and 'religious' dichotomy of modern secular thinking, but also among other Islamists who claim

monopoly over their own interpretations of divine truth. An alternative way to study this topic is to concentrate less on 'real motivations' and more on the reasons why actors frame their political action with religious undertones. For example, why do armed groups operating in Syria and Iraq, which might be a manifestation of long accumulated political and economic grievances, mobilize around a specific religious/sectarian ideology or identity, rather than any other secular ideology? Even though such groups might have additional motivations in mind such as gaining political and economic power, which is the case for many groups across the globe regardless of any political ideology they are entertaining, everything from their discourses to actions are religious. As long as political actors in the Middle East, be it state or non-state, predominantly frame their actions in a religious discourse today, this only proves that religion as an ideology, identity, and institution has a dominant role in shaping Middle Eastern politics today. We should thus put our efforts more into understanding the 'whys' and 'hows' of this religious trend rather than questioning the 'real motivations' behind the trend itself.

Shifting our focus away from 'real motivations' also helps us overcome the ideology – rationality dichotomy and develop a more nuanced understanding of the religious phenomenon in Iran's foreign policy today. A second central conclusion of this research is that analyzing Iran's Middle East policy either as rational or ideological lies on false dichotomy. Rather, it is a neat amalgamation of rationality and ideology, and thus transcends the realist and constructivist hypotheses. Iran's 'Axis of Resistance' policy is a highly relevant case to understand this and other dualities concerning religion in Iran's foreign policy.

6.3. 'The Axis of Resistance'

As mentioned elsewhere in this research, Iran's 'axis of resistance' policy resembles the 'export of the revolution' policy of the first decade on many levels. The Chapter 3 of this thesis has shown that the export of the revolution was a very ideological policy. The policy had roots in the transnational Shia political empowerment project of the 19th and 20th centuries, within which the Islamic Revolution and the subsequent revolutionary Islamist regime in Iran outgrew. One central objective of the Islamic

Republic after the revolution was to help similar Islamist independence movements culminate in a revolutionary moment and in Islamist political systems elsewhere in the region. Therefore, support for Islamist movements by political, diplomatic, oftentimes military, and Islamist propaganda means constituted the backbone of this policy.

The Islamic Republic experienced a certain level of disappointment and disillusionment with the export of the revolution policy during the first decade. As a matter of fact, no movement has culminated in a full-fledged revolution in the Middle East that replaced the existing un-Islamic governments with a self-reliant, independent, Islamic political system. Iran has remained to be the only revolutionary Islamist regime that has undergone a thorough Islamic state-building process in the region. Nevertheless, the project was not a complete failure either. The Iranian efforts to export the revolution has delivered Islamist political formations across the region that paid allegiance to the Iranian regime and adopted *velayet-e faqih*, if not Islamist governments. The Iranian regime could create the Hezbollah in Lebanon, SCIRI in Iraq, and instilled a sense of Shia empowerment in Gulf countries. Among these examples, the Lebanese Hezbollah can be described as the hallmark of this project. Although Lebanese Hezbollah has failed to replace the existing consociational political system with *velayet-e faqih* and was finally transformed from an anti-systemic, internationalist movement into a nationalist, Shia political party competing in Lebanese electoral democracy, it grew into an international military actor fighting against commonly defined 'enemies' with the Islamic Republic and proved to be a reliable ally to the Iranian regime. The evolution of the Hezbollah model was far from what the Iranian regime aspired to achieve with the export of the revolution policy. Nevertheless, the Qods Force's efforts in the region had succeeded in creating influential and friendly allies like the Lebanese Hezbollah, SCIRI and Badr Brigades for the regionally isolated Iranian regime. In that sense, the export of the revolution was not an unrealized, but a half-realized dream and a half-completed process. The Iranian leadership gradually dropped the term 'export of the revolution' from their political vocabulary during 1990s and Ayatollah Khamenei very rarely used the term. However, in those rare moments when he used the term, he said that the Iranian has 'already exported the revolution,' meaning that the Iranian regime has exported the

revolutionary spirit and the inspiration of political mobilization for Muslims in Palestine, Afghanistan, and North Africa.[850]

As discussed in Chapter 4, some foreign policy experts interviewed for this research emphasized that the events of 2011 opened a window of opportunity for the realization of this unfinished dream for the Iranian regime. Both Iran's foreign policy activities in Iraq and Syria described in Chapter 4 and the accompanying foreign policy discourses mapped out in Chapter 5 prove this point. Both IRGC - Qods Forces' activities and the accompanying discourses were highly religious in outlook. The IRGC provided political support to Shia political parties in Iraq, arbitrated among different Shia factions for electoral success, mobilized Shia groups for armed resistance, and engaged in an institution-building process in the security sector in Iraq and Syria. By this way, Iran's policy towards the Middle East after 2011 resembled the export of the revolution policy that was left unfinished after the first decade. In this respect, Interviewee 10 defined the 'axis of resistance' as a term used in place of 'the export of the revolution' today.[851] By looking at the religious and ideological elements, one might argue that the 'axis of resistance' has inherently religious and ideological overtones. Nevertheless, both policies also diverge on many fronts as well. A comparison of the 'export of the revolution' and 'axis of resistance' can illuminate how religion plays out in each policy and thus map out the intricate relationship between rationality and ideology in Iran's foreign policy today.

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[850] See Khamenei, 'Leader's Address to Government Officials,' http://english.khamenei.ir/news/1446/Leader-s-Address-to-Government-Officials.

[851] Interview with Interviwee 10.

Table 2. 'Export of the Revolution' vs. 'Axis of Resistance'

	'EXPORT OF THE REVOLUTION'	'AXIS OF RESISTANCE'
Nature of the Iranian Regime	• *New revolutionary regime*	• *Consolidated revolutionary regime*
Target Audience	• *The Islamic Ummah* *Against;* • *'Global arrogance,' American imperialism in the region* • *Zionism, Israel*	• *Ideological allies (Palestinian resistance and Lebanese Hezbollah)* • *Traditional strategic ally (Assad regime in Syria)* • *Shia political and armed movements Iraq, Syria, Yemen* *Against;* • *'Takfiri terrorism,' Sunni jihadism* • *American presence in the region*
Foreign Policy Interests	• *Priority given to transnational, ideological, Islamic revolutionary interests* • *Nation-state's interests serve transnational interests*	• *Complementarity between nation-state's interests and transnational interests*
Foreign Policy Objectives	• *Politically-defined* • *Islamic state formation* • *Creating a moral order based on Islam and Islamism*	• *Militarily and politically-defined* • *'Friendly regimes'* • *Alliance-building*
Foreign Policy Strategy	• *Islamic Republic and velayet-e faqih as a model for state building* • *Exportation of the political model*	• *Iran's security system as a model with future political ramifications* • *Exportation of the security model* - *IRGC model* - *Basij model* - *Hezbollah model*
Role of Religion	• *Religion as a state 'identity' and 'ideology'*	• *Religion as a 'power'* - *Shia symbolism, Karbala paradigm, martyrdom for armed mobilization* - *IRGC and Basij unconventional capabilities* - *Iran's security and strategic culture*
The Nature of Foreign Policy	• *Ideological*	• *Ideological and rational*

First, the nature of the Iranian regime during the periods when each policy was pursued can tell us a lot about the evolution of each policy. The 'export of the revolution' should be treated predominantly as an ideological policy pursued by a new, inexperienced, and unconsolidated revolutionary regime. The high Islamic, moral, and communal principles beneath this policy reflect the revolutionary passion, fervor, and idealism of that period. During the early years of the regime, the policy was pursued with least attention to the historical and political context within which the revolutionary regime functioned, the capabilities at hand, and to the associated risks. Iran was following this policy under war circumstances, the Islamic regime was not consolidated yet, Islamic state-building was in process, and the regime security was already at risk. Despite such adverse circumstances, the idealism of the revolutionary thinking pushed the Islamic Republic towards such a costly policy abroad. On the other hand, by year 2011, the Islamic Republic was a consolidated revolutionary regime. A consolidated revolutionary regime should be understood as coterminous to being more experienced and more institutionalized. The experience of the 8-years-long war, Islamic state building, and of survival in a regional and international system to which it is resisting has rendered the Islamic Republic a very rational player in international politics. However, rationality should not be understood as coterminous to a move-away from ideology. The ideology and the identity of the revolutionary Islamic regime has remained constant. But, the Islamic Republic has learnt through experience to rationally evaluate the external political context within which it operates, to realistically evaluate its strengths, weaknesses, capabilities, and devise the optimal policy alternative. In other words, the consolidated revolutionary regime is committed to the state identity and ideology, but knows when to push for ideological principles and objectives and when to shy away. As one expert interviewed for this thesis emphasized, the Iranian regime compromises with the international community in the areas where it feels less powerful, but exhibits an ideologically assertive attitude where it feels more empowered.

This methodological rationality has been reflected on the course of the 'axis of resistance' policy after 2011. The Iranian regime carefully evaluated the regional context, the associated risks and opportunities during this period and determined the optimal solutions for each aspect of the policy. The target audience of the 'export of the revolution' policy was the Islamic *Ummah*. The Iranian aspiration was to unite all Muslims, both Sunni and Shia, against US imperialism in the region and Zionism. The Iranian regime

has succeeded in finding Sunni allies especially among Palestinian resistance groups. Nonetheless, the Iran-Saudi rivalry, some Sunni Arab regimes' alliance with the USA, and the lack of reception to Islamic revolution in these regimes led Iran to reevaluate its position on the Sunnis. The Arab uprisings in 2011 and the rise of Islamic political parties in Egypt and Tunisia was a short moment of promise for Iran, where the Iranian regime looked hopeful about the political transformations and prospects for cooperation with these Sunni countries. However, the sectarian war in Syria and the rise of Sunni jihadism soon proved that the Sunni-Shia context after 2011 did not look any promising at all. Therefore, the new target audience for the 'axis of resistance' were the Shiites of the region. Iran has sought to incorporate the Shia empowerment into the already existing resistance movement led by Lebanese Hezbollah, the Syrian regime, and the Palestinian resistance against Israeli and US policies in the region. The Iranian regime both stepped up the Shia mobilization and legitimized its opposition to fellow Muslims in Syria and Iraq by the discourses of '*takfiri* terrorism' and 'defense of the holy shrines.' The regime also added an element of anti-imperialism to the Shia mobilization by claiming that Sunni jihadism was supposedly supported by Western countries that wanted to divide the Islamic *Ummah*. By this way, a complementarity between the ideological pillars of the axis of resistance and that of Shia awakening was hoped to be achieved to a certain extent.

When it comes to the foreign policy interests and objectives pursued under the 'export of the revolution,' priority was given to transnational, ideological and Islamic interests over the nation-state's interests. Between 1985 and 1989, the revolutionary regime's survival was given priority over the interests of the *Ummah*. However, the revolutionary regime framed the shift in priorities away from the *Ummah* to Iran as nation-state as a necessity ultimately serving the interests of the *Ummah*. According to the new foreign policy discourse, the survival of Iranian nation-state as the 'center' and the 'leader' of the Islamic *Ummah* was necessary for the long-term interests of the *Ummah* itself. The objectives of the 'export of the revolution' were politically defined. We can summarize the ultimate objective of the export as reversing the nation-state system, establishing a united Islamic moral and political order, and building an Islamic State in the region. On the other hand, the 'axis of resistance' policy does not look to be aspiring to reverse the nation-state system in the region. To the contrary, the Iranian leadership consistently emphasized the territorial integrity of both Iraq and Syria on multiple occasions. The project can be more accurately described as one of alliance-

building in the region. The interviewees have highlighted the term 'friendly regime' for the Iraqi case. Politically, a 'friendly regime' refers to a Shia-dominated government in Iraq that is friendly to Iran's national interests in the region. In terms of the intended political system, the data of Shia armed groups in Chapter 4 has shown that most pro-Iranian groups operative across Iraq and Syria seems to pay ideological allegiance to Khomeini's ideology. Nevertheless, exporting *velayet-e faqih* does not seem to have a priority over having a 'friendly' Shia-dominated political system in Iraq today. A similar case is observable in the Syrian case as well. The Iranian regime seems to be committed to securing the friendly Assad regime in place.

One complication concerning the 'friendly regime' ideal was the multivocality of Shia revival across the region. As repeatedly pointed out by the interviewees, no monotonous Shia revival exists in the region. Shia clerical authorities in Iraq, Shia political parties, the Lebanese Hezbollah, and the Iranian regime have diverging ideological positions and political aspirations regarding the role of clerical authority in politics, the political objectives of Shia empowerment, and the future of Iraq and Syria. The Iranian regime acknowledged the intra-Shia political divergences early on and refrained from dubbing a single political model for the movements. However, even though the Iranian regime did not propose a single political model to be emulated by all, the Shiites' political confusions around sectarian identity on the one hand and national identity on the other stood as another obstacle before the Iranian policies over the Shiites in the region. At that very moment, a security shock changed the course of events to the advantage of Iran: the rise of Sunni jihadist groups and especially of ISIL in Iraq and Syria. Politics had divided the Shias, but suddenly security reunited them. The data on armed Shia mobilization presented in Chapter 4 has shown that Shia mobilization has remarkably gained an impetus after ISIL rose and threatened the Shia communities in 2014. After 2014, we observe a closer military coordination and cooperation among Iran, the Lebanese Hezbollah, the Assad regime, and pro-Iranian Shia groups in Iraq. The Lebanese Hezbollah mobilized the Syrian Shiites, the pro-Iranian Shias in Iraq crossed the border to fight alongside the Assad regime in Syria, and the IRGC – Qods Forces provided the organizational and military support to the formation and development of *Hashd al- Shaabi* and *Jaysh al-Shaabi*. As a result, the 'axis of resistance' appeared more to be a military alliance among relevant parties than a political project by 2017.

The military overtones of the 'axis of resistance' policy is observable in the strategies employed by the Iranian regime as well. As discussed extendedly in Chapter 3 of this thesis, the Islamic revolutionary ideology and identity of the regime has assigned certain transnational roles to the Islamic Republic. A central self-ascribed role of Iran is being an inspirational model for similar Islamist political movements. During the first decade of the revolution, the Islamic Republic portrayed itself as a political model to be emulated by others. Exporting *velayet-e faqih* as a political model, at least to the Shia movements if not the Palestinian resistance groups, stood at the center of this policy. The analysis of Ayatollah Khamenei's discourses on the transformations of the Middle East after 2003 has shown that the 'model' discourse is still used by both Ayatollah Khamenei and IRGC, albeit in multiple ways. The Iranian leadership first adopted the 'Islamic Awakening' discourse to refer to the Arab uprisings in 2011. The Islamic Awakening was a political project, referred to Iran's own experience to make a revolution and establish an Islamist government, and hence reflected the Iranian expectations that the Arab uprisings would follow the same political course. Therefore, the Islamic Republic presented itself as a government of Islamic Awakening and as a 'model' of Islamic Awakening with its forty years of experience in Islamic state-building. However, the Iranian regime had already given up the hope on Islamic Awakening by 2014, both due to the failure of Arab uprisings across the Middle East as well its final decision to support the authoritarian Assad regime as opposed to those very Islamic movements challenging the Assad regime in Syria. The discourse of 'resistance' replaced 'Islamic Awakening' in the later periods. Although 'resistance' has political connotations and refers to the Iranian resistance against imperialism during the revolution and although Iran portrayed itself as 'a government' of resistance,' the term has also strong military connotations which have been gradually highlighted after 2014.

When the 'axis of resistance' alliance acquired more military overtones, there was a gradual transition in the Islamic Republic's discourses from the Islamic Republic as 'a political model' to the Islamic Republic's security institutions as 'a security model.' The IRGC statements repeatedly pointed out to the IRGC and *Basij* as a 'military school,' 'a security thinking,' and 'a security model' shaping the Shia armed mobilization, *Hashd al-Shaabi*, and *Jaysh al-Shaabi* in the region. Several experts interviewed for this research have brought up this point as well, especially within the context of discussions regarding the future evolution of Shia mobilization in the region. Accordingly, three models are put

forward: the IRGC model, the *Basij* model, and the Hezbollah model. Differentiating these models from one another is not easy task. On a very general level though, the *Basij* model proposes that the Shia armed groups and formations like *Hashd al-Shaabi* might remain as paramilitary forces institutionally integrated into the Iraqi security apparatus after the ISIL threat is eliminated. The IRGC model means the evolution of the forces from a paramilitary force institutionally integrated into the Iraqi security apparatus to a social and economic actor responsible for the reconstruction of the Iraqi state following the end of civil war. The Hezbollahi model, on the other hand, has the most political connotation. This model is proposed in responding to the fact that most powerful Shia armed groups within *Hashd al-Shaabi* are either political parties in Iraqi electoral system or are on the way to establish their own political parties, thus resembling the Lebanese Hezbollah's evolution since 1980s. The 'export of the revolution' aimed to establish an Islamic *Ummah* by the strategy of exporting the Iranian political model. On the other hand, if the Iranian regime is extending any model to the region today, it seems to be a security model for the moment. Nonetheless, as the discussions on the future of Shia mobilization suggest, this security will have important political ramifications for the future, impacting the evolution of the political systems in Iraq and Syria.

What about the role of religion under both policies? As discussed above, the 'export of the revolution' was a very ideological foreign policy pursued by a new revolutionary regime. The self-assigned role and duty to support Islamist revolutionary movements elsewhere was an extension of the new regime's ideology. As such, religion played a role as an identity and ideology for this policy. On the other hand, religion has become increasingly institutionalized over decades. Iran's relations with the Lebanese Hezbollah, SCIRI, and several other groups in the Middle East over decades has rendered the regime a more experienced player on the field. Iran's transnational networks with the allied Shiites have become increasingly consolidated. The IRGC and *Basij* have become increasingly institutionalized and empowered as ideological security formations. Overall, Iran's unconventional forces and military strategies have become the central pillar of Iran's security and strategic culture. Shia symbolism of martyrdom and sacrifice, which are rooted in the Ashura culture and Karbala narratives of the Shia faith, strongly facilitated volunteer-based popular mobilization against Islamically and ideologically defined opponents. The Shia symbolism has been institutionalized in the body of *Basij* and IRGC and has further institutionalized both security formations in a cyclical way.

Today, Ayatollah Khamenei's speeches, IRGC statements, and policy experts interviewed for this research show that these ideological security formations are a source of power for the Islamic Republic. Ayatollah Khamenei refers to IRGC within the context of Iran's 'power' and 'strategic depth' in the region. He refers to revolutionary Islamist ideology and Islamism as a source of 'power' in the region as well.

By 2011 when the socio-political upheavals swept the region, the revolutionary ideology and the revolutionary regime's institutions had become quite institutionalized. This experienced and consolidated Iranian regime did not set out with a foreign policy that looked very ideological, religious, and Shia-oriented without any careful understanding of the regional context, a review of Iran's capabilities, and a calculation of associated risks and opportunities. This research has shown that religion has become an institutionalized foreign policy element over the past forty years. Religion has become a source of 'power,' which the Iranian regime seems to put into action when the circumstances are right. The objectives of the 'axis of resistance' policy might be both ideological and strategic. This leaves us with an overview of to what extent the realist and constructivist hypotheses explain the phenomenon at hand.

It should be noted early on that both realism and constructivism have explanatory power over the role of religion in Iran's 'axis of resistance' policy today. Nevertheless, neither the main findings of this research fits none of the hypotheses derived from each scholarship. Moreover, the main findings also challenge the basic assumptions of both realism and constructivism. The most important finding of this research is that religion has become an institutionalized source of 'power' for Iran over the years. The 'power' element seems to approximate the realist thinking at first sight. However, this finding seems to be at odds with the traditional realist thinking that puts hard power capabilities and conventional capabilities at the center of scholarly analysis. The realist and rationalist IR scholarship has traditionally measured a state's power predominantly by looking at its conventional military capabilities, number of military personnel, and military technology. Estimates on the balance of power among nations are predominantly performed by the data collected in line with this traditional conceptualization of power. On the other hand, the power balances in the Middle East since 2003 point out to the unravelling of a different story for the Middle East: Power seems to be determined not by conventional military capabilities regional powers have at their disposal, but by their capacity to

mobilize religious and sectarian identities for political and military ends. Not the states with extensive conventional military capacities, but the ones with a distinctive capacity to mobilize populations along religious and sectarian lines seems to enjoy an upper hand in regional politics today. This is because of the shaky ground upon which the Middle Eastern nation-states are built on. The sectarian nature of nation-building process in the Middle East, state failure, and the undecided tone of prospective political orders in the region have featured religious and sectarian identities as important elements of regional politics. The type of Islamist political ideology each nation aspires to promote and sectarian identities characterize the formation of political alliances in the region. As such, religion and sectarian identities, and not conventional military capabilities, shape the balance of power. As for Iran, both primary and secondary sources prove that the Iranian strategy of mobilizing the Shiites by forging state-to-sub-state level relations has shifted the regional balance of power in favor of Iran in the recent years. If Iran aspires to become a regional leader in the Middle East, as most analysts point out, the strategy that pays off is not pushing forward the Iranian *Artesh* on the field or even strengthening Iran's nuclear capacity. The religious strategy, the reliance on religious identity, institutions, mobilization pays off for greater influence in the region. In that sense, the Iranian use of religion is based on very realistic and rationalist grounds.

Besides realism's traditional understanding of 'power,' the Iranian strategy of state-to-sub-state strategy fails to match the realist assumption that states are the primary actors of international politics. Politics is not among nations in the Middle East today, but among national, sub-national, and trans-national entities. Trying to understand transnational power politics, to gauge alliance patterns, and to ruminate over prospective political orders in the post-2003 Middle East with a single focus on nation-states leaves out the reality of the transnational political setting in the region. Finally, the realist hypothesis says that religion is used by Iran as a functional tool, which implies that religion is employed by the regime as an instrument for a greater material gain in regional politics. However, religion is not a functional tool in Iran's foreign policy; it is an element of institutionalized foreign policy. As the historical analysis, interviews, and policy elites' discourses have shown, religion is an integral part of Iran's theocratic system, self-identification, grand ideological vision, institutional structure, and finally security culture. As such, religion is not a tool, but an institution of the consolidated Islamist

revolutionary regime in Iran. The Islamic Republic sees institutionalized religion as a distinctive asset and source of power to rely on in devising its Middle East strategy.

Constructivism has more room to explain the role of religion in Iran's 'axis of resistance' policy without challenging the basic assumptions of this scholarship. First, constructivism better captures the reality of the regional interaction context within which regional players operate. Accordingly, transnational Shia networks of national, sub-national, and trans-national actors whose political allegiances and activities surpass that national borders define the interaction context in the region today. The relevance of multiple forms of actors in the system is quite telling about the presumed reality of Westphalian order in the Middle East. To the contrary, this research has shown that weak state structures, transnational sectarian allegiances, and the centrality of non-state actors in the Middle East challenge the Westphalian assumption inherent in all IR paradigms. The 'axis of resistance' is a military alliance among various forms of Shia political actors today, but this alliance has the capacity and potential to turn into a transnational security and/or political order in the future if the existing circumstances are maintained. The dual nature of Lebanese Hezbollah both as an ideological and unconventional army with extended military operations on extra-Lebanese territories and as a religious-nationalist political party functioning in the Lebanese electoral system is quite predictive over the possible transformation of Iraqi and Syrian Shia militias and formations like *Hashd al-Shaabi* in the coming years. As new forms of political players with such dual – national and transnational - natures emerge, so does a new transnational political and security order in the Middle East.

Finally, the main findings of this research are partially compatible with the constructivist hypothesis that Iran's Islamist revolutionary ideology leads to an ideological and religious foreign policy in the Middle East. The elite interviews as well as discourse analysis prove that the revolutionary ideology and transnational religious interests are important to the main contractors of Iran's Middle East policy – the Supreme Leader and the IRGC. Nevertheless, the same interviews and discourse analysis have also proved that ideology is not a binary opposite to rationality in the minds of Iran's political elites. Revolutionary religious ideology is rationality, power, and strategic depth in the Iranian political elites' mind, which rules out any monopoly of constructivist hypothesis in explaining Iran's 'axis of resistance' policy today. In conclusion, neither the

constructivist hypothesis that puts religious ideology at the center, nor the realist hypothesis that merely sees religion as a tool is sufficient to explain the institutionalized role of religion in Iran's foreign policy. Whether the central policy objective is ideologically or rationally defined, religion is there as an institutionalized foreign policy element and a source of power for Iran.

6.4. Acknowledgement of Limitations and Further Research

One of the best descriptions that fit the Islamic Republic's capital city of Tehran is probably 'the city of martyrs.' The buildings are decorated with paintings of Holy War martyrs. The streets are named after key revolutionaries who were killed in *Haft-e Tir* bombings. It is not uncommon to see a conference hall named after Shahid Chamran in one of the biggest universities of Tehran. Revolution, war, and martyrdom are ordinary themes of the city easily capturing an ordinary visitor's attention in an ordinary public space in Tehran. However, the war tanks, weapons, and soldiers' photographs that decorated the most crowded Park Laleh of Tehran in September 2016 were not ordinary. They were there for a particular occasion. Iranians were preparing for a week-long national event that commemorated the 28th anniversary of the end of Holy Defense War. Public ceremonies were organized for a week, where participants read war poems, soldiers narrated war stories and actors held theatre plays illustrating and extolling the heroism, sacrifice and victory of Iranian soldiers that volunteered on the frontlines. After one of those plays was over on a September night in Park Laleh, the organizer of the event took up the microphone, commemorated the heroes of the Holy Defense War who sacrificed themselves for resistance, and finally changed the topic to the heroism of another person that volunteered for another purpose, at another place, and another time. He was referring to a volunteer who had set out for Syria to defend the sacred Shia shrine of Sayyeda Zainab, got wounded during the conflict, and came back to Iran. Reportedly, he was ready to go back to Syria once fully recovered. The speaker closed the event with a long speech on Shia volunteers leaving their homes and families all around the world

to defend the holy Shia shrines in Syria. The audience shared the speaker's sympathy and accompanied with prayers for those volunteers.[852]

Approximately one and a half year after these commemorations, on December 28 of 2017, Iranians took to the streets chanting anti-governmental and anti-regime slogans. Besides slogans addressing the economic problems in the country, some people were also protesting the Iranian policy in the region. In contrast to the audience's prayers for the Iranian volunteers defending the Shia sites outside the country the previous year, some people were now chanting 'No to Gaza, no to Lebanon, I sacrifice my life only for Iran!' and 'Forget about Syria, think about us!' The timing of the protests was not ordinary, as the protests came during the yearly budgetary discussions in Iran. In the new budget, Hassan Rouhani government was intending to cut state subsidies introduced by Ahmadinejad government as part of his populist economic policies and to increase taxes on basic commodities and services, all of which would have a direct impact on the living conditions in Iran. Nevertheless, what pushed the protestors to the streets was not only the budget cuts, but also what the budget cuts were intended for. Unlike his predecessors, president Rouhani had decided to openly announce the proposed budgetary allocations to each state institution under the principles of transparency and accountability. For the first time, Iranians were learning about the budget allocated for Shia *hawza* activities, Shia clerics, religious state institutions, and religio-ideological foundations.

As a matter of fact, billions of Iranian Tomans were being spent on the activities of Shia religious education complexes, welfare services for Shia clerics, the regime's propaganda apparatus, Shia research centers, and the regime's Shia-oriented educational and cultural activities in foreign countries. The allocated budget for Al-Mustafa University, which was tasked with training foreigners inside and outside the country in Iran's revolutionary ideology and with promoting Shiism was far beyond the budget allocated for Iran's leading research universities. Besides state institutions, the budget proposal revealed the high volumes of monetary allocations to the *bonyads,* i.e. the foundations. The budgetary allocations to some religious, educational, and cultural *bonyads* owned by the leading clerics of Qom *hawza* such as Grand Ayatollah Makarem Shirazi and Hassan Khomeini and committed to promoting Shiism, Iranian culture, and

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[852] This anecdote is based on the author's field observations in 2016, in Tehran, Iran.

language at home and abroad surpassed that of several state institutions. Added to that was the tremendous budgetary increase for the IRGC and the *Artesh*.[853]

The budgetary revelations of December 2017 showed that the Islamic Republic is not cutting back on ideology. To the contrary, the regime is making significant investments to Shia *hawza* activities, the Shia clerical institutions, and the regime's ideological, cultural, and religious promotion activities. As a matter of fact, the Shia clergy in Iran has become a social class, the Shia *hawzas* have increased their socio-economic power, and religious institutions and *bonyads* have become more influential over time. Moreover, their power and influence is not limited to the domestic realm, but it surpasses the borders through networking with other *hawzas* and their activities in other countries. We should therefore read the institutionalization of religion in Iran's foreign policy as part of a greater institutionalization of religion process and the rise of clerical class in Iran since the Revolution. This study focused on how religion impacted the Iranian strategy in Iraq and Syria on the political and military realm. However, the political and military activities of the IRGC have long been accompanied by the 'soft power' activities of the Islamic Republic in both countries as well. The *hawza* connections between Qom, Najaf, and Karbala, the welfare support of very influential *bonyads* operating in Shia-populated regions such as Imam Khomeini Relief Foundation, and the establishment of Islamic Azad University branches in Iraq and Syria are only a few elements constituting the 'soft power' capacity of the Islamic Regime in Iraq and Syria. Future research focusing on how religion plays a role in soft power projection of Iran over 'axis of resistance' countries will further illuminate the nature of Iranian foreign policy activities in the Middle East.

A second limitation of this study is that it examines the 'axis of resistance' phenomenon from a single perspective. This study is originally intended as a study on Iran's foreign policy in the Middle East and therefore, it presents an understanding of the 'axis of resistance' from an Iranian foreign policy perspective. It should be acknowledged that the 'axis of resistance' is a multifaceted and extensive phenomenon with multiple players. As such, this is a study on Iranian foreign policy that may sometimes say too much without intending to do so on behalf of other players. This study is only based on

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[853] See Ezgi Uzun, 'İran'ın Öfkesi Neden Hizipler Üstüydü,' *Gazete Duvar*, January 26, 2018, https://www.gazeteduvar.com.tr/forum/2018/01/26/iran-protestolarinda-tabanin-ofkesini-anlamak/.

field trips conducted in Iran. Ideally, a field research in Iraq and Syria would greatly complement the study. However, the security complications in both countries and the nature of the phenomenon studied being related to non-state actors eliminated the prospects for field research in both countries for this research early on. Most data on Shia mobilization in Iraq and Syria has been derived from English and Persian sources. An alternative, probably more credible and detailed, data source would be Arabic sources, which was also eliminated from the very beginning of this research due to language barriers. Future research should thus study the axis of resistance from Iraqi, Syrian, Hezbollahi, and even Yemeni perspectives to fully understand the phenomenon that impacts the today and tomorrow of the region.

Another methodological limitation concerns the interviews. Given the geographical and thematic division of labor in foreign policy between the Ministry of Foreign Affairs on the one hand the IRGC and the Supreme Leader on another, 'axis of resistance' falls within the domain of the Supreme Leader and the IRGC. However, the experts interviewed for this study are predominantly representing the more pragmatist and rational Foreign Ministry school. The IRGC and the clerical establishment are inaccessible to most foreign policy researchers, which prevented any meeting with them for the purposes of this study. Nevertheless, this limitation has been sought to be compensated by a thorough analysis of these actors' discourses on foreign policy. Finally, the greatest limitation of the study is that the 'axis of resistance' is a very recent phenomenon and still in progress. Although it traces the current phenomenon back to 2003, the study predominantly focuses on a 6-year period between 2011 and 2017. Due to its topicality, the 'axis of resistance' is extremely susceptible to be disturbed by another systemic shock, which does not look improbable given the history of the region. This makes it difficult to make sound predictions over the evolution of this phenomenon and draw policy implications in the short-term.

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APPENDIX A

LIST OF INTERVIEWS

Interviewee 1, interview 1. Researcher speciliazed on Islamic political thought and the intellectual history of the Islamic Revolution at the Center for Islamic Research, in Tehran, Iran. Interview with the author, conducted on August 22, 2015 at Shahid Behesthi University, Tehran, Iran.

Interviewee 1, interview 2. Researcher speciliazed on Islamic political thought and the intellectual history of the Islamic Revolution at the Center for Islamic Research, in Tehran, Iran. Interview with the author, conducted on August 14, 2016 at Park Sayee, Tehran, Iran.

Interviewee 2, interview 1. Iranian researcher on foreign policy, Turkish-Iranian relations, and regional affairs at Center for Strategic Research, Tehran, Iran. Interview conducted in September 2015 at Park Mellat, Tehran, Iran.

Interviewee 2, interview 2. Researcher on foreign policy, Turkish-Iranian relations, and regional affairs at Center for Strategic Research, Tehran, Iran. Interview 2 with the author, conducted on July 22, 2016, at Park Laleh, Tehran, Iran.

Interviewee 3. Senior foreign policy expert specialized on Iran's relations with the West and nuclear diplomacy at Center for Middle East Strategic Studies. Interview with the author, conducted on September 1, 2015 at Center for Middle East Strategic Studies, Tehran, IranIran.

Interviewee 4, interview 1. Expert on Iranian foreign policy specialized on relations with the Middle East at Center for Strategic Research and professor of international relations at Shahid Beheshti University, Tehran, Iran. Interview with the author, conducted on August 14, 2016 at Center for Strategic Research, Tehran, Iran.

Interviewee 4, interview 2. Expert on Iranian foreign policy specialized on relations with the Middle East at Center for Strategic Research and professor of international relations at Shahid Beheshti University, Tehran, Iran. Interview with the author, conducted on September 13, 2016 at Regional Studies Institute, Shahid Beheshti University, Tehran, Iran.

Interviewee 5. Expert on Iraqi politics at Center for Strategic Research. Interview with the author, conducted on September 10, 2016 at Farhangsara Niavaran, Tehran, Iran.

Interviewee 6. Professor of international relations at Shahid Beheshti University, Tehran, Iran. Interview conducted on September 13, 2016 at Regional Studies Institute, Shahid Beheshti University, Tehran, Iran.

Interviewee 7. Professor of international relations at Shahid Beheshti University, Tehran, Iran. Interview with the author, conducted on September 13, 2016 at Regional Studies Institute, Shahid Beheshti University, Tehran, Iran.

Interviewee 8. Professor of international relations at Tarbiat Modarres University and expert on international relations and political economy at Center for Strategic Research. Interview conducted on September 16, 2016 at Tarbiat Modarres University in Tehran, Iran.

Interviewee 9. Turkish diplomat in Erbil, Iraq. Skype interview with the author conducted on May 21, 2017.

Interviewee 10. Turkish professor of international relations specialized on Iranian security establishment. Meeting with the author on April 6, 2018 in Ankara.

Dehghan, Mostafa. Journalist at ANA News Agency of Iran. Interview with the author, conducted on September 5, 2015 at ANA News Agency, Tehran, Iran.

Göksedef, Ece. Journalist at TRT World and formerly at Aljazeera Turk. Skype interview with the author conducted on June 13, 2017.

Khalaji, Abbas. Former professor of international relations and Iranian foreign policy at Imam Hossein University. Interview with the author conducted on August 4, 2016 at Tehran International Exhibition, Tehran, Iran.

Majidyar, Ahmad. Expert on Iranian domestic and foreign policy at Middle East Institute, Washington DC, USA. Interview with the author conducted on November 20, 2017 at Middle East Institute, Washington DC, USA.

Malaek, Hossein. Former ambassador of the Islamic Republic of Iran to China, a senior foreign policy and international relations expert and head of the foreign policy unit at Center for Strategic Research in Tehran, Iran. Interview with the author conducted on August 14, 2016 at Center for Strategic Research, Tehran, Iran.

Saghafi-Ameri, Nasser. Former senior Iranian diplomat and former foreign policy expert specialized on Iran's relations with the West, nuclear proliferation, and international security at Center for Strategic Research. Interview with the author conducted on August 22, 2015 at Center for Strategic Research, Tehran, Iran.

LIST OF INTERVIEW QUESTIONS

- *How does Iranian foreign policy decision-making mechanism function?*

- *What institutions and actors are responsible for Iran's foreign policy in the Middle East?*

- *What are the similarities and differences between the foreign policy orientation of the Office of the Supreme Leader and that of the Ministry of Foreign Affairs in Iran?*

- *How can you describe the Islamic Republic's state identity? What are its key components?*

- *How can you describe the Islamic Republic's state ideology? What are its key components?*

- *How does the Islamic Republic's ideology factor into Iran's foreign policy?*

- *What role does Shiism and/or Shia identity play in Iran's foreign policy orientation?*

- *How does the Shia culture play a role in the evolution of Iran's security/military approaches?*

- *Academic literature on Iran's foreign policy predominantly suggest that there is a constant shift between ideology and pragmatism in Iran's foreign policy. What are the possible sources of that presumed shift?*

- *How did the Islamic Republic receive Arab Uprisings in 2011?*

- *How can you describe Iran's foreign policy strategy on Iraq and Syria today?*

- *Why does the Islamic Republic of Iran engage extensively on a political and military level in Iraq since 2003 and Syria since 2011? Do ideological or material concerns play out in Iran's decision to engage?*

- *Why does the Iranian regime pursue an ideological and religious foreign policy in Iraq and Syria today?*

- *What historical experiences inform the Islamic Republic's political elites' foreign policy decisions on Iraq after 2003 and Syria after 2011?*

- *How can you describe Iran's threat perceptions, national security interests, and foreign policy priorities in the post-2003 Middle East?*

- *What are the associated risks and opportunities for the Iranian regime in the Middle East given the transformations of the region since 2003?*

- *How can you describe Iranian influence over Iraq since 2003? What are possible areas of influence?*

- *What are the opportunities and limitations of the influence of a common Shia identity concerning the Iranian influence over Iraq?*

- *What kinds of support does the Iranian regime provide to Shia political parties and militia formations in Iraq?*

- *What are some of the prominent pro-Iranian Shia political actors in Iraq?*

- *How can you describe the Islamic Republic's reaction to the claims over a rising 'Shiite Crescent' as dubbed by other players in the region?*

- *In there a 'Shiite Crescent' in the region?*

- *How are the relations between Najaf and Karbala hawzas in Iraq and Qom hawza in Iran in the post-2003 period?*

- *How can you describe the Shia clerical relations between Iran's Qom hawza and Iraq's Najaf?*

- *How does the theological divide between Najaf and Qom hawzas on the political role of clerics and velayet-e faqih reflect on the Shia empowerment across the region?*

- *What can you say about the role of Iranian security institutions like IRGC and Basij in Iraq and Syria?*

- *Both IRGC and Basij media sources claim that formations like Hashd al-Shaabi and Jaysh al-Shaabi are modelled upon Iranian Basij. What does it mean for these formations to be modelled upon Iranian Basij? What can we say about the organizational and ideological aspects of such a 'model'?*

- *What does the term 'resistance' mean in the Islamic Republic's political discourse? What does the 'culture of resistance' refer to?*

- *What does 'axis of resistance' mean? How can we describe the content and referents of this concept?*

- *My survey of IRGC and Basij media sources show that both the content and referents of the 'axis of resistance' concept has changed through decades. How have the post-2003 regional transformations reflected on 'the axis of resistance' concept?*

- *What motivates Iranian-Afghan militia formations such as Liwa Fatimiyyoun and Iranian Basiji to go fight in Syria? Material or ideological concerns?*

- *How does the recruitment to Liwa Fatimiyyuon and Iranian Basij occur in Iran? Who runs the recruitment process?*

- *Compared to other regional players, the Islamic Republic seems to have an immense mobilization capacity over populations in the region. What are the sources of Iran's mobilization capacity?*

- *What do you think about the future evolution of security formations like Hashd al-Shaabi and Jaysh al-Shaabi in Iraq and Syria?*

- *What are the possible implications of Shia mobilization in Iraq and Syria as well new organizational formations such as Hashd al-Shaabi and Jaysh al-Shaabi on the future of the Middle East region?*