

Photography and the Politics of Representing Algerian Women

Jennifer Abbate

Photographs of Algerian women functioned as a medium of representation during the Algerian War. In some cases, French soldiers forced Algerian women to unveil for portrait identifications, which violated local Algerian customs and religious practices. Collectively, French colonizers used photography as a mechanism to display colonial power, which Algerian women physically and psychologically (defined as how these women mentally responded to a threatening situation) struggled with and, accordingly, we can trace visual modes of resistance in these photographs. In the early twentieth century, women struggled to fight colonial power because French patriarchy controlled how images represented Algerian women in the harem, thus creating a negative and false replica of Muslim culture. Opposed to early twentieth-century depictions of the "idle" Arab women of the harem, the violent events of decolonization presented certain spaces from which to actively resist French colonialism. As I will explore in this essay, the medium of French military photography became a site of opposition against colonial domination, particularly when French military officials forcibly unveiled Algerian women in front of the camera.

The act of unveiling became an iconic symbol of French domination because it symbolized how French colonizers attempted to destroy Algerian women's identity, which linked these women to Algerian culture. However, visual evidence portrayed clear resistance against colonialism and pushes the viewer to feel compassion for Algerian women. By confronting the ways in which French colonizers used a specific form of violence, which targeted the bodies and minds of Algerian women, these photographic images portray women's political resistance to French colonialism during the Algerian War.

Contrary to Mark Garanger's example, the scholar Malek Alloula analyzed photographic postcards of Algerian women, which staged erotic images of the "off-limits" harem of the early twentieth century. In Alloula's collection *The Colonial Harem*, the author points out that the postcards no longer represent Algeria or the Algerian women, but the "Frenchman's phantasm of the Oriental female and her inaccessibility behind the veil in the forbidden harem". Unlike Marc Garanger's work,

these postcards are uniquely analyzed because they distort the truth of Algerian society. However, both photographic images relate to the larger setting of colonial power and portray the effects colonialism had on Algeria at different time periods.

In the example of the postcards, the power relations between the colonizer and the colonized are visually represented in photographs because the European male is able to project his fantasies onto the passive, photographed female. Therefore, prior to the process of decolonization men attempted to visually manipulate the portrayal of dominance in many of the photographs constructed by European men – the postcards, for example, represent the "erotic" nature of colonial society by depicting Algerian women (paid prostitutes) in various states of undress. Historian Laura Mulvey defines the active male figure as the ego ideal of the identification process, meaning, in this case, the "superior" French imperialist is able to define the creation and representation of a particular vision. Alloula argues that photographic imagery first and foremost represents the photographer's desires. The images French colonizers created represented specific fantasies of French colonialism and also provided French colonizers with a sense of conquest and mastery over Algerian women, and hence the entirety of the Algerian colony.

Although the act of unveiling is complicated because it produces different meanings in different contexts, French colonizers believed unveiling Algerian women symbolically established French power. The French-Martinican psychologist, Frantz Fanon argues that the white veil unifies the colonial perception of the feminized Algerian society and also represents indigenous women's purity and thus their need for protection in the public sphere. Historically, the veil covered the body to discipline, protect, reassure, and comfort Algerian women as they partook in the public sphere. French colonizers, on the other hand, believed the veil symbolized a "backward" society; therefore, in photographic images the French removed the veil to symbolically show their superior power. As Fanon claims, "With each [unveiling], the French authorities were strengthened in their conviction that the Algerian women would support Western penetration into the native society." This explains why the act of unveiling Algerian women became a strong symbol of European domination. For the French, unveiling expressed the willingness to give up Algerian identity and change Algerian habits under the control of French occupation. It also symbolized a French victory over Algerian society from one end of the colonial period to the other.

French colonizer's replicated this colonial fantasy in many of the postcards displayed in *The Colonial Harem*. Photographers intentionally represented unveiled Algerian women as eroticized and sexualized creatures because the French imagination illustrated Algerian women as a subject population that required liberation. Alloula explains,

The officials of the French administration in Algeria committed to destroying the women's originality, and under the instructions to bring about the disintegration at whatever cost, French administration directed their military to concentrate their efforts on women wearing the veil.

Alloula further demonstrates that French colonizers destroyed Algerian women's originality by "creating the colonial spirit in picture form." Algerian women became erotic symbols to the colonist when their veil disappeared from sight, which signified to the French, a sexualized depiction of the human body prohibited by Muslim tradition and also French possession over Algerian women.

The photographs illustrated in *The Colonial Harem* inspired colonial discourse, which explains how French representations determined power relations. Photography is able to manipulate the viewer because of the forced realism the imagery suggests. For example, Alloula examines how the images represent Algerian prostitutes as "ordinary" Algerian women. These women are directed to pose in photographs that stage the joys of sapphism and exhibitionism, which objectify Algerian women collectively as lazy, idle, and sexualized in the harem. The photographs are deliberately taken to create a vision of a feminized society that the French nation can exploit and possess. However, this contaminates the collective identity of Algerian women because all Algerian women are now representations of these images.

Despite living in different periods of colonialism, similar types of false representation helped Algerian women unify and establish respectable agency, or how women actively contributed to fight colonialism through the process of decolonization. A distinction needs to be made between urban Algerian women fighting in the National Liberation Front (FLN) and rural Algerian women in the process of decolonization. As Marnia Lazreg explains, "Urban women comprised twenty percent of all women involved in the war and generally chose to join the FLN, while rural women were forced to give refuge to members of the FLN either out of compassion or fear." However, according to Lazreg 77.9 percent of the total female population that participated in the war was comprised of rural women. The FLN also stratified labor according to gender; women in civilian services, where women primarily took care of food supplies, medical materials, cooked, fund raised, and transported weapons. And although very few women served as soldiers engaged in combat, rural women's involvement still remained dangerous because French military raped, tortured, and killed any civilian who supported the FLN group.

Rural women became active victims while not finding active leadership in armed revolts. Fanon claims that "until 1955, combat was waged exclusively by men, but as it became more difficult for men to wage the war the FLN felt it was necessary to involve women." According to the FLN, women's roles generally consisted of

providing moral support to fighters and resisters among other minor duties. Sometimes, decolonization permitted Algerian women to display agency by allowing women to feel they had the power to resist French control. In this sense decolonization liberated Algerian women; portrayed in photographic images taken by French military. Lazreg argues,

Images of Algerian women in the early twentieth century remained revolutionary because it was a chance to take charge of one's life, and finally break in deeds and not in words the structural and discursive silence imposed upon them for more than a century.

French colonialism denied Algerian women basic political and economic rights – as often did the process of decolonization. Thus, women used their bodies to translate their emotions into political expressions of resistance. Although decolonization gave Algerian women a means to fight for freedom, photography functioned as the visible mechanism for women to display different forms of anticolonial agency.

Marc Garanger, a Frenchman born in Normandy, served as a photographer in the French army from 1960-1962, where he composed Algerian cartes d'identite (national identity cards) that forced women to unveil. In this case, photography allowed Algerian women to expose how colonial aggression affected Algerian society, specifically the native women. According to historian Karina Eileraas, the images produced by Garanger opened up a space for identification with racial and sexual politics rooted in colonial imagery. This further demonstrates how Garanger's identification cards became a useful tool for women to politically fight against French colonialism. In a sense, Garanger allowed Algerian women to "pose" in such a way that enabled Algerian women to use their bodies as a mechanism of communication. The visual imagery portrayed in Garnager's photographs captured the verifications of colonial power while also allowing illiterate women, in particular, to consciously engage in anticolonial activities. Garanger's images created a powerful mechanism for rural women to actively demonstrate women's opposition to French colonialism.

Visual imagery functioned as an important system of resistance because photography constantly reinterprets the past, thus becoming a "collection of spectacle" meaning that past events become history and shift into a symbol of representation. In the collection of portraits taken by Garanger, women position their bodies and facial expressions in ways that communicate opposition to French colonialism. For example, in images 4 and 6, the women show clear expressions of unhappiness. Taken together, women's unhappiness cannot be mistaken as individual reaction to the forced photography.

There are photographs that distinctively represent clear defiance, but other images seem to capture the humiliation these women physiologically struggled with. Military objectives expected women to meet the camera's eye, which opened up a mixed variety of ways women silently communicated against colonialism. For example, in many images women gazed directly at the camera with their eyes wide open and lips tightly pursed, which generated a spirit of disgust, dismissal, and confrontation. However, in others women expressed the opposite emotions, such as mortification and dishonor, about the forced unveilings. Algerian women portrayed negative expressions that justified the acceptance of foreign control and "rape of the colonizer" as the French forcefully unveiled them.

These photographs that forced Algerian women to unveil became a form of physiological violence because Algerian women are ordered to perform a specific task against their religion and culture. Muslim culture insists that there should be some type of physical barrier that separates women from men in the public sphere. A Muslim Algerian woman, raped by French soldiers during the war, Djamila Bouhired, explains, "The man who is not my husband is not allowed to see me." Therefore these photographs that forced women to unveil became a form of physiological violence because Algerian women are ordered to perform a specific task against their religion and culture. Bouhired argues, "Being ordered to see women without the veil absolutely carried a thrill for the French military to watch women physically feel humiliated and inferior. The connections Algerian women had to Muslim culture are why these photographs become strikingly provocative and appealing. There are photographs that distinctively represent clear defiance, but other pictures seem to capture the humiliation these women physiologically struggled with, once again meaning how women mentally responded to threats of violence.

The French military tried to physiologically weaken and destroy the identity of Algerian women by attempting to threaten women's morale. I characterize this as "physiological torture" because French colonizers forcibly attempted to establish power over the mind and body of Algerian women. French administrators defined a precise political doctrine that claims, "If we [the French nation] want to destroy the structure of Algerian society and its capacity of resistance, we must first of all conquer the women in which society hides behind." French colonists needed to convince themselves and their victims that they held invincible power, thus French colonists aimed at dehumanizing Algerian women by forcefully removing their veils and exploring their bodies. This symbolized an attempt by French military to destroy the pride Algerian women felt towards their nation.

Jean-Paul Sartre who wrote a preface to Henri Alleg's famous book, *The Question*, claims, "French military desperately tried to humiliate Algerians, to crush their pride and drag them down to an animal level. To kill the spirit means to establish power

mentally and physically among the Algerian race." The physiological torture Algerian women experienced in all the staged photographs simply expressed the desire for France to powerfully dominate over their colonized resistor. However, physiological torture also drove Algerian women to produce a powerful agency against the photographic mechanisms of colonial power, different than the colonial postcards from the early twentieth century.

Marc Garanger constructed individual portraits of Algerian women that are strikingly in appearance because the images show how angry these women are opposed to the "passive" images seen in Alloula. French military used the identification cards to gain knowledge against the FLN movements while also humiliating Algerian women. Unlike the women in Alloula's images, Algerian women purposely posed to silently resist colonial violence. Marc Garanger's official duty to the French nation actually offered a useful tool that helped Algerian women record their visual communication against French violence. Driven by the spirit of revolt, Garanger exploited photography's capacity to shape the national imagery and he purposely tried to create images that would question authorizing functions of the colonial gaze.

Garanger opened up a space for Algerian women to communicate with the public. Unlike the photographs seen in Alloula, Garanger does not ask nor does he direct these women to pose in a specific manner. The dark gazes the Algerian women showed shocked Garanger as he understood the violence played upon them. The identification cards created a powerful agency for these women because the pictures portray their emotions of refusal from French colonizers. Garanger understood that the Algerian women became critical agents of photographic representation. Instead of complying with French fantasies of colonial rule, Algerian women refused to be appropriated by the French colonizer, which is shown in these photographs. Women's agency is most visible here because these women take ownership of their bodies to create a silent statement against such a powerful nation. The women successfully publicize their resistance against French control and their gazes become more than digital art; rather turn into political memory that signifies a control over French desires. Even as events of decolonization allowed women to display visual agency through the images taken by Garanger, women also became subject to "physiological torture" in Garanger's photographs because of the unwanted and uncomfortable exposure unveiling created.

Identify cards became a mechanism for French imperialists to find a way to maintain a powerful grasp over Algerian identity. The photographs taken of unveiled Algerian women demonstrated a final attempt to establish superiority over Algerian natives. However, Algerian women used the photographs to their advantage and visually communicated resistance against the French while also publicizing to the world the violent struggles Algerian woman faced. The photographs captured the reality of

hatred and humiliation these women encountered while opening up the opportunity for women to fight for independence.

Bibliography

Alleg, Henri. *The Question*. Lincoln: University of Nebraska Press, 2006.

Alloula, Malek. *The Colonial Harem*. Minneapolis: University of Minnesota Press, 1986.

Eileraas, Karina. "Reframing the Colonial Gaze: Photography, Ownership, and Feminist Resistance," 118:4 (2003): 807-840.

Evans, Jessica and Stuart Hall. *Visual Culture: the Reader*, 1st ed. London: SAGE Publications Ltd, 1999.

Fanon, Frantz. *Algeria Unveiled. A Dying Colonialism*. Trans. Haakon Chevalier. New York: Grove Press, 1965.

Garanger, Marc. *Femmes Algériennes: 1960*. Biarritz: Atlantica, 2002.

Lazreg, Marnia. *The Eloquence of Silence: Algerian Women in Question*. New York: Routledge, 1994.

Raphaëlle Branche, "Sexual Violence in the Algerian War," in *Brutality and Desire: War and Sexuality in Europe's Twentieth Century*, ed. Dagmar Herzog. New York: Palgrave MacMillan, 2011.

[Last Updated: 8/12/16](#)

A History of US-Peruvian Policy in Addressing the Relationship between Shining Path and the Cocaine Economy throughout the 1980s

Eddie Bejarano

Introduction

After twelve years of military rule from 1968 until 1980, Peru finally held democratic elections with Fernando Belaunde Terry claiming the Presidency. At first it seemed as though Peru had begun a new chapter in its history but promises of a bright future would quickly dissipate in the face of a rising Maoist guerrilla insurgency known as Sendero Luminoso (Shining Path). Created by Abimael Guzman in 1970, Shining Path desired to spread its Maoist doctrine across Peru and ultimately dismantle the central government in Lima. The Shining Path initiated a bloody war against the Peruvian Government that would claim the lives of thousands of innocent Peruvians and completely restructure Peru's social, political, and economic apparatus.

The initial response of the Belaunde Government was timid at best, allowing Shining Path to expand its operations to other parts of the country, including the coca-growing region of the Upper Huallaga Valley (UHV). Almost in unison with the growing presence of Shining Path in the UHV, the illicit drug business began to consume the region because of the increased global demand for cocaine. The booming cocaine trade not only negatively affected the Peruvian government but also brought the United States into the picture because American officials believed that in order to address the mushrooming domestic drug issue, the problem needed to be stifled at its source. It was at this juncture that Shining Path and the cocaine economy would establish a poisonous relationship that deeply troubled officials both in Lima and Washington.

Officials in Lima and Washington were unable to orchestrate a consistent integrated policy from 1980 to 1989 that competently addressed the growing issues of a growing guerrilla insurgency and booming cocaine economy. The unholy alliance of guerrilla insurgents, poverty stricken coca farmers, and Colombian cocaine dealers challenged not only the Peruvian government but also the government of the United States. In this paper I will argue that throughout the 1980's, Shining Path used the cocaine

economy to bolster its organization by taking advantage of an incoherent agenda advanced by Peruvian and American government officials.

Origins of Shining Path in the Upper Huallaga Valley (UHV)

Shining Path did not originally have its base of operations in the UHV; actually the organization was forced into that region of Peru due to the Belaunde's government crackdown in the department of Ayacucho. At first, the Belaunde administration had played down the threat of Shining Path at the onset of its "people's war" in 1980. A 1982 cable back to Washington from the United States Embassy in Lima reported that Shining Path only constituted a "nascent guerrilla threat." Information provided by Peruvian bureaucrats to American officials in Peru made it very clear that the guerrilla insurgency was not a credible security issue.

Although the Peruvian government was informing its American counterparts that there was no threat posed by the Shining Path, the department of Ayacucho, which served as the base for the guerrillas, was falling into a state of unrest. In order to suppress Shining Path, the Peruvian government put the department of Ayacucho under a state of emergency. As a result of the state of emergency the government enforced a strict curfew in the departmental capital, discontinued constitutional protection against arbitrary arrest, and opened the way for the first concerted use of force against the guerrillas. However, the guerrillas were not the only people affected by this government crackdown. The citizens of Ayacucho were also repressed because the Belaunde administration believed that it needed to destroy any popular sentiment held towards the guerrillas. Through the use of repressive actions, the Peruvian Government was able to completely suppress the growing chaos that had consumed Ayacucho but Shining Path responded by simply moving its base of operations to the coca-growing region of the UHV.

Despite the setback of being forced out of its original region of Ayacucho, Shining Path encountered conditions in the UHV that were very favorable to the organization. Stretching from the northern part of the department of Huánuco into the department of San Martín, the UHV was the world's largest coca-producing region. This region of Peru is situated on the eastern slopes of the Peruvian Andes and is most commonly referred to as the selva alta (high rainforest). Densely populated by mountainous vegetation, the UHV provided an ideal location to grow coca because of the high levels of acidity in the soil, high seasonal amount of rainfall, high humidity, and weak state presence.

Before Shining Path arrived to the UHV the region was home to migrants from different mountainous regions of Peru who were searching for a new place to grow coca. After being expelled from the sierra regions of Cusco for farming coca, many

coca farmers migrated north to the UHV in order to continue their practice. With an economy in recession and budding demand for coca, the farmers of the UHV turned to the cocaine industry to earn a living. Employment generated by the cocaine economy was an important source of income in a nation where about sixty-five percent of the population was either unemployed or underemployed. Coca leaf production provided the farmers with a cash crop that was easy to grow and yielded larger profits compared to other commercial crops. Also, Colombian drug traffickers viewed the UHV as a convenient region to demand coca leaf production because of the lack of an economic substitute for the peasants. In fact, by late 1981 the Peruvian government, with USAID (United States Agency for International Development) financial support, began the Special Project for the Upper Huallaga (PEAH), which sought to provide farmers with alternative crop substitutes. Unfortunately for government officials, alternative crop substitutes were not nearly as profitable as was growing and selling coca. Peruvian farmers in the UHV were not willing to let go of a profitable market that provided them with the means of living better lives than they had previously known. In addition, it was much easier for coca farmers to sell coca to Colombian traffickers than having to transport alternative crops to markets that were usually situated far away from the UHV.

Origins of the Cocaine Economy in the UHV

The cocaine economy played a complex role in the lives of Peruvian farmers. At times it seemed heaven sent because of large profits gained from business, but becoming a part of an illicit drug industry also had its tribulations. Coca cultivation was also lucrative because it did not require farmers to travel large distances to sell the product. There were no major police or army bases in the region, and as a matter of fact prior to the large growth in coca cultivation, the Peruvian government rarely bothered to pay the region any attention. The UHV virtually became a no man's land where a lack of a government presence made it easy for an illicit economy to take root. Because of the region's isolation it became increasingly convenient for middlemen to go directly to the peasants' farms to purchase coca. By the early 1980s, the increase of coca production made local farmers deal with two different actors: Colombian drug dealers and U.S.-Peruvian government officials.

Beginning in the 1980s, Washington pressured Peru's government to begin sending coca eradication teams to the UHV. Therefore, coca farmers had to deal with a variety of issues that ranged from dealing with abusive drug dealers to having their livelihood sabotaged by US-Peruvian coca eradication units. Getting involved in an illicit drug industry brought farmers into a dangerous business world where it was impossible to keep their hands clean. Colombian drug traffickers and government officials held power over the locals because they possessed a larger spectrum of means to achieve

their goals. Whereas the peasants only wanted to make a profit from their only viable source of capital, the other actors in this story had much larger ambitions in mind.

Peruvian coca farmers found themselves stuck between a rock and a hard place. If they did not participate in the cultivation of coca then an opportunity to make profits was being bypassed but if farmers did participate in the illicit economy then the dangers of dealing with drug dealers and government eradication contingents became a part of everyday life. It was in this environment that Shining Path was able to firmly establish itself in the UHV. A change in Shining Path's modus operandi pertaining to gaining popular support allowed it to fill the political void that was prevalent in the UHV and ultimately allowed the organization to solidify its position in the cocaine economy.

Change in Shining Path's Modus Operandi

Arguably one of the most fascinating components of the nature of Shining Path's involvement in the UHV concerns how the organization managed to adjust its modus operandi in order to gain support from locals. The social and economic environment in the UHV was completely different from any other that Shining Path had encountered before. It became evident from the start that if Shining Path was effectively going to gain control of the region and cocaine economy, it would need to adapt its strategy to present conditions. Shining Path altered its methodology in the UHV in two important manners: first, it established relationships with the farmers by addressing their grievances and second, Shining Path downplayed its Maoist rhetoric of anti-capitalism. "Its support among the general population was based more on local concern for protecting and expanding coca crop and coca paste production than on the political cause of orthodox Maoism that Shining Path offered."

Typically in other regions, Shining Path believed that indoctrinating its supporters was critical to its "people's war" against the Peruvian government. In order to lead a true Maoist revolution, the guerrilla insurgents believed that its followers needed to understand and embrace the concepts of the movement. Shining Path became renowned for sending out death threats to opponents of their movement or even individuals who they believed were agents of capitalism. In a warning letter to a neighborhood committee leader, Shining Path stated it would unequivocally stamp out crime and that mass graves sites were ready for useless members of society. But this ruthless approach changed in the UHV because Shining Path realized that conditions in the region required the organization to act in a completely different manner. Instead of indoctrinating the coca farmers, Shining Path decided to address their grievances against drug traffickers and government forces. Coca farmers began to regard Shining Path as a partner against armed drug dealers and government forces seeking to eradicate coca. By assimilating into the communities of the UHV, Shining Path was

able to intimately understand the issues that faced coca growers and as a result, create a tacit partnership.

Another extremely important adjustment of policy made by Shining Path dealt with changing its anti-capitalist approach towards the cocaine economy. This development is particularly telling of just how different the environment was in the UHV compared to other regions of Peru that Shining Path previously operated within. Moreover, this adjustment of methodology demonstrated that although Shining Path was a very ideological organization, it was able to be flexible and opportunistic in order to achieve its goals.

A major component of the organization's doctrine was its antipathy towards capitalist's economics, mainly because it contended that a capitalist economic system that abused disadvantaged individuals. When Shining Path arrived in the UHV, it still maintained its anti capitalist position but came to the realization that peasants in the region were relatively better off than peasants in other parts of Peru. The coca farmers not only needed the cocaine economy but they even fared pretty well from it. Thereby, Shining Path's anti capitalist rhetoric was unattractive to coca farmers in the UHV because it did not coincide with their economic realities. Shining Path realized that in order to establish a relationship with coca farmers it needed to accept the capitalist nature of the cocaine economy and protect the interests of farmers.

It was also in the interests of the Shining Path to accommodate the cocaine economy because of the profit that it could make from the business. Regardless of being ideologically opposed to the cocaine industry, leaders of Shining Path could not pass up on a chance to accumulate large sums of capital at a time when monetary resources were scant. Shining Path rationalized its participation in the cocaine economy by claiming that drugs debilitated the imperialists' enemy, the United States. It is very clear that Shining Path needed to change its modus operandi in order to fully function within the framework of the economic realities prevalent in the UHV. Shining Path took advantage of the opportunity that presented itself in the UHV, even if it meant making drastic adjustments to its methodology.

Shining Path's Relationship with Coca farmers

The political and social vacuum that Shining Path encountered in the UHV allowed it to create a strong symbiotic relationship with coca farmers. Shining Path needed the coca farmers in order to gain a footing inside the cocaine economy whereas coca farmers needed Shining Path for protection from drug suppliers and government units. One of the first steps that Shining Path took to secure a relationship with coca growers involved providing them protection from the injustice perpetrated on them by Colombian drug dealers. Before Shining Path's involvement in the region, Colombian

drug traffickers were the main power brokers in the area. The drug dealers set the quota for how many bundles of coca was needed and also decided how much coca farmers would get paid. "Prior to the intervention of the Shining Path, farmers risked being killed by drug traffickers if they failed to deliver a certain amount of coca leaves." Drug traffickers also underpaid farmers by paying them less despite the budding demand for cocaine. In terms of addressing the unbalanced payment of farmers, Shining Path took on "an intermediary role, acting as a kind of armed union for growers, forcing traffickers to pay higher prices for coca than farmers could negotiate for themselves." With Shining Path providing the needed protection against injustices committed by drug traffickers, coca farmers perceived the organization as a necessary ally that allowed them to prosper.

Although Shining Path did provide farmers sanctuary from abusive drug dealers, there were even more important actors from which farmers in the region needed protection: US and Peruvian government forces. By looking to dismantle the cocaine economy, US-Peruvian operations in the UHV were undermining the livelihood of many coca farmers in the region. Shining Path played a pivotal role in threatening and, at times, attacking government forces that were in the region attempting to eradicate coca cultivation. "The insurgency has also employed its well-practiced terrorist tactics to deal with UMOPAR (Mobile Rural Patrol Unit), the regional police, and CORAH (Control and Reduction of Coca in the Upper Huallaga), the primary eradication program." These eradication groups were constantly sabotaging coca growers and as a result created a sense of hostility towards government programs in the region. Government actions against the peasants only pushed the coca farmers to depend more and more on Shining Path for protection. Noticing how hostile the coca farmers were to UMOPAR and CORAH forces, Shining Path took on the responsibility of protecting the economic interests of the coca farmers. This act of defense against the government on behalf of the coca farmers solidified a relationship between Shining Path and the inhabitants of the UHV.

Shining Path's Relationship with Drug Traffickers

Another complex group with which Shining Path established a relationship consisted of Colombian drug traffickers who managed the cocaine economy. The Colombian drug traffickers used the UHV as a base of operations because of its remoteness and lack of a formidable government presence. Although at other points in Shining Path's history it would have been unlikely that the organization would establish ties with Colombian drug traffickers, the change of modus operandi drove the group to put its ideological beliefs aside.

Shining Path was able to provide drug traffickers with three primary benefits: admittance to clandestine airstrips, protection and forewarning of police and military

action, and the disturbance of counter-narcotics operations. Shining Path charged the Colombian drug traffickers substantial amounts of money for the services it provided, and the traffickers were willing to pay because those services made the cocaine economy a more fluid business. For each plane that landed on an airstrip under the control of Shining Path, the guerrillas charged drug traffickers from \$3,000 to \$10,000 per flight. Since Shining Path had infiltrated the communities of the UHV, it was able to establish an efficient warning system that would tip off the guerrillas as to whether government units were in the area. Whenever government squads did manage to get to areas where cocaine was being farmed or processed, Shining Path repelled eradication workers. "Shining Path used the opportunity to increase its harassment of the CORAH crews and the police." By using violence to disturb counter-narcotics operations Shining Path made it a risky decision for American and Peruvian officials to continue sending units to the region. "The insecurity presented to the individuals and equipment executing the eradication efforts of the Peruvian and U.S. governments was so great that all eradication, interdiction, and logistical efforts in the UHV were suspended between February and September 1989."

Colombian drug traffickers did not mind working in regions under control of the Shining Path as long as the organization continued to provide these three important functions. Protected by the Shining Path, drug traffickers were able to establish a strong base of power in the UHV through which it sustained the growing international demand for cocaine. Shining Path gained two important benefits from its relationship with drug traffickers: it was able to make a substantial profit from providing security services and it also undermined the government presence in the region. The relationship between Shining Path and Colombian drug traffickers was similar to the one that the insurgency held with coca growers in that these relationships were symbiotic. Arguably, the most important element in Shining Path's relationship with both coca farmers and drug traffickers was that they all shared a common enemy: US-Peruvian eradication teams that were designated with the job of destroying coca.

Shining Path's Relationship with Government forces in the UHV

The final actor in the UHV with which Shining Path interacted consisted of U.S-Peruvian government eradication units such as UMOPAR and CORAH. Contrary to the symbiotic relationships established with drug traffickers and coca farmers, Shining Path's relationship with government forces was one defined by confrontation. Shining Path's dealings with government forces such as UMOPAR and CORAH were bound to culminate in violence because the goals of both groups were inherently opposed. UMOPAR and CORAH units were in the UHV because U.S and Peruvian officials wanted to decimate the cocaine economy at its source. Whenever CORAH went out on eradication missions, they were usually accompanied by UMOPAR, Peruvian

police forces, and sometimes American DEA agents helped by providing logistical support.

These various government forces were sent with CORAH workers in order to provide government workers protection from guerrilla attacks. As mentioned above, a major part of Shining Path's relationship with farmers and traffickers was founded on the protection of mutual economic interests. For Shining Path to continue prospering from the cocaine economy, it needed to drive government eradication forces out of the valley. When CORAH or UMOPAR forces embarked on eradication ventures, they were typically met with heavy resistance from local farmers as well as Shining Path insurgents. Unlike the local coca farmers, Shining Path possessed the necessary military means to kill eradication units in the valley. The increasing levels of violence as well as rising number of government casualties pushed officials to reconsider the kind of strategies that were being practiced to combat the production of coca.

Around the end of the 1980s, another interesting dynamic in the relationship between Shining Path and government entities in the region developed as the influence of the United States began to grow. The growing involvement of the United States in the war against the cocaine economy provided Shining Path an opportunity to produce a nationalist rhetoric that helped justify its attacks on eradication teams. Since the livelihood of farmers in the UHV was based on their capability to grow and sell coca, eradication programs inherently undermined the lives that they led. By the late 1980s Shining Path interpreted American intervention in the UHV as a direct attack on Peru's sovereignty, and in fact, this was an issue that the Peruvian government was trying to avoid. U.S participation in counter narcotics programs let Shining Path paint the issue as a war of national resistance. Increased American participation in eradication programs had the effect of brewing anti-American emotion along with encouraging support towards the guerrillas.

Shining Path was competently able to impede government forces such as UMOPAR and CORAH from successfully completing their goals. Ultimately, Shining Path's strategy of confrontation with government units forced American and Peruvian officials to rethink the approach they were taking to formulate counter narcotics operations. The ineffectiveness of eradication programs and growing strength of Shining Path displayed the incompetency with which government policy tackled the issue of destroying Shining Path's ties to the cocaine economy.

Benefits and Effects of the Cocaine Economy for Shining Path

Of all the actors involved in the cocaine economy, Shining Path benefited the most from its participation. The largest benefit that Shining Path procured from its involvement in the cocaine economy was the monetary gains that the organization was

able to make. Prior to becoming an actor in the cocaine economy of the UHV, Shining Path did not have a steady source of income. Unlike other leftist guerrilla insurgencies, Shining Path did not seek the fiscal support of Soviet or Cuban communists to fund its movement. According to various estimates, the burgeoning cocaine economy in Peru was believed to produce anywhere between \$500 million to \$2 billion per year making it the most profitable industry in the country. Estimates state that Shining Path made about \$30 million annually from the cocaine economy, making it the best-funded organization in Peru.

The biggest effect that this large source of income had on Shining Path was that it allowed the organization to expand its military capabilities. "The increase in the Shining Path's military capability fueled an increase in the number of attacks after 1986, from under 2,000 a year in 1983, when the group entered the Upper Huallaga Valley, to more than 3,500 by the end of the decade." Shining Path's increased operational capabilities allowed it to attack government forces with larger and stronger attacks than before 1983. Instead of executing low-level ambushes of army or police forces, Shining Path began to attack army barracks and police outposts, which dramatically increased the amount of casualties suffered by government forces. Ultimately, the benefits of the cocaine economy affected Shining Path by providing it with the fiscal means to destabilize and delegitimize the Peruvian government.

US and Peruvian Policies in the UHV: Crop Substitution, Eradication, and Interdiction

Initially, joint U.S.-Peruvian programs to disassemble the cocaine industry took the shape of eradication teams and alternative crop programs. CORAH workers and UMOPAR forces were composed of Peruvians and financed by USAID. The main task assigned to CORAH involved manually removing coca that was discovered in the UHV whereas UMOPAR forces were in charge of interdiction efforts. On the U.S. side, PEAH's purpose was to get coca farmers in the UHV to halt cultivation and take up farming legal crops. The Drug Enforcement Agency (DEA) provided logistical assistance to Peruvian CORAH and UMOPAR teams that ventured out on eradication missions in the UHV.

Crop substitution, eradication, and interdiction were the main three mechanisms that U.S. and Peruvian officials employed in the UHV to diminish the cultivation of coca. Crop substitution and manual eradication programs proved to be completely counterproductive to American and Peruvian goals. Since farming coca was such a lucrative business, government officials needed to find a legal crop that made practical sense for farmers to grow and that could also economically match the profitability of coca. The problem was that legal crops took too long to generate profits and a tumultuous crop market impoverished farmers who took on the

initiatives of PEAH. Also, the climate, environment, and infrastructure in the UHV were not conducive to the growth of legal crops whereas coca grew rapidly and in large quantities. Crop substitution in the UHV was not a viable option for pragmatic, economic, and environmental reasons that reinforced the belief among coca farmers that continuing to farm coca was their optimal choice.

U.S. officials believed that the cocaine economy needed to be stymied at its roots. Thus the first proposed method of eliminating coca was manual eradication. Peruvian CORAH teams were the main group to carry out these eradication maneuvers and used various tactics to remove the coca plants such as burning, cutting, and digging up the roots. To shield the CORAH workers from local farmers and Shining Path guerrillas, the Peruvian government used UMOPAR teams to protect the eradication teams. The policy of manually eradicating coca was not very effective in decreasing the amount of cultivated coca. In 1986 alone, there were 12,000 hectares of coca cultivated of which only 5,000 hectares were eradicated by CORAH.

The main problem with CORAH's manual eradication strategy was that it put its workers into very hostile conditions. Local farmers were strongly opposed to CORAH units because once their coca crops were destroyed they were forced to settle for a less profitable alternative crop provided by PEAH. "Farmers who participated in PEAH's projects were unable to earn enough money to support their families and repay the debts that they had to incur in order to cultivate legal crops." PEAH's inability to satisfactorily compensate farmers for the coca plants that they lost directly affected the confrontational attitudes that coca farmers held towards CORAH workers. Although having UMOPAR units as protection, CORAH workers faced constant attack by Shining Path and independent coca farmers. Shining Path's superiority to UMOPAR teams let it inflict serious damage on eradication teams in the region. Increasing violence in the region perpetrated by Shining Path against CORAH workers brought eradication programs to a complete standstill by 1984 when nineteen workers were killed. As the amount of deaths related to Shining Path attacks on CORAH workers began to rise, Peruvian and American officials decided to adopt a different approach to destabilizing the cocaine economy at its source; interdiction.

After the unsuccessful campaign of manually eradicating coca from the UHV, government officials turned towards a policy of interdiction. Choosing the option of interdiction was premised around the idea that if U.S and Peruvian policy could hurt particular facets of the cocaine economy then the price of coca would dwindle enough to provoke farmers to stop cultivating it. Interdiction efforts targeted coca paste and cocaine laboratories, trafficker's airstrips, as well as prominent traffickers themselves. Contrary to manual eradication efforts that were executed by Peruvian forces, interdiction campaigns combined both Peruvian and American teams. Along with UMOPAR forces and members of Peru's Republican Guard, U.S. pilots and DEA

officials helped the Peruvian government with interdiction operations. U.S pilots were particularly helpful in launching an aerial attack that bombed cocaine laboratories that were hidden within dense jungle areas of the UHV. The increase of aerial bombardments by 1988 made interdiction a more effective option than manual eradication but culminated in a standstill as coca farmers and drug traffickers found a way to preserve their business. Coca farmers and drug traffickers had the tactical advantage of being able to easily mobilize themselves into different parts of the UHV that were unaffected by interdiction operations.

Although Shining Path could not do much to deter the aerial campaign, it did have the ability to stave off ground operations led by UMOPAR. Coca farmers were especially affected by interdiction operations because as the price of coca dropped so did the quality of their livelihood. Shining Path played the role of protector for a marginalized people whose only source of capital was under attack by government programs. Instead of diminishing the strength of Shining Path's role in the cocaine economy, "attempts to destroy coca proved a valuable recruiting, mobilizing, and propaganda tool for the guerrillas." "The eradication programs had alienated the coca growers and so did the interdiction programs; soon an alliance between the growers and guerrilla groups greatly increased the security risks for anti-drug personnel in the area."

Corruption in Peruvian Police and Army forces

A major element that undermined government policies enforced in the UHV was the corruption within Peru's army and police forces. From 1985 to 1989 members of the U.S. embassy in Lima began receiving reports that Peruvian army and police units were collaborating with the guerrillas and traffickers in order to keep the cocaine economy alive. One reason that explains the decision of government forces to become complicit in the cocaine economy was the state of the Peruvian economy. Due to the need to make payments on foreign debt as well as rising inflation, the Peruvian government needed to make budget cuts that affected how much army and police personnel were getting paid. Towards the end of the 1980's the budget for Peruvian armed forces was slashed by fifty percent bringing monthly salaries of enlisted workers to ten dollars. Significant salary cuts across the board pushed army and police workers to collaborate with drug traffickers. Drug traffickers consistently bribed police officials to look the other way when shipments of coca paste went through local airports and guarantee that covert airstrips were not detected.

Accepting bribes from drug traffickers completely undermined the campaign to eradicate the cocaine economy, which in turn strengthened Shining Path. Peru's army also accepted bribes and came to an "understanding" with Colombian drug traffickers in the UHV. As late as 1991 a Peruvian army officer sent to the UHV to report on the relationship between Shining Path and drug traffickers discovered that the army

would close off streets by local airstrips in order to establish a perimeter for drug traffickers to safely transport narcotics. The rampant corruption that existed among army and police forces in the UHV was counterproductive to the goal of suppressing the relationship between Shining Path and the cocaine economy.

Lack of a Unified Policy Goal Defined by American and Peruvian Officials

Of all the reasons discussed thus far, the most influential component that allowed Shining Path to establish a connection to the cocaine economy throughout the 1980s was the lack of a unified policy goal defined by American and Peruvian officials. For the United States, the main goal in Peru was to destroy the cocaine economy in the UHV but the Peruvian government had a completely different objective in mind: destroying Shining Path's guerrilla insurgency.

Through USAID and other forms of contribution, the United States had considerable leverage over the Peruvian government in deciding what policy choices would be made. The United States was reluctant to involve itself in the Peruvian state's war against Shining Path and found it more significant to stamp out the ballooning cocaine trade. The Peruvian government wanted to dismantle the cocaine economy because they were aware of the effects that its profitability was having on Shining Path's military capabilities but combating narcotics always came secondary to repressing the guerrillas. Peruvian officials wanted the United States to fund its military venture against Shining Path but "Congress expressed its concern over military assistance due to the checkered human rights record of Peru's armed forces and police." As stated in a National Security Council meeting over counter-narcotics operations in Peru circa 1989, the U.S. would "only consider giving military aid to Peru if the GOP used the military to protect police forces tasked with the job of eradication from Shining Path attacks." In order to understand the lack of a unified policy between Lima and Washington it is useful to understand why each government believed their position was the most important.

The Peruvian government wanted to defeat Shining Path because the guerrillas posed a serious threat to the state's political institution. By the late 1980s Shining Path was attacking government infrastructure regularly and began to run operations in the country's capital of Lima. Although Shining Path had been conducting its war in the Peruvian highlands, its appearance in the capital served as a paradigm of the state's incompetency to adequately deal with the insurgency. Once Lima was attacked there was an imperative for Peruvian politicians to deal with Shining Path.

On the other hand, American officials wanted the Peruvian government to focus its policy on the cocaine economy in the UHV because of the domestic political pressure to stifle the cocaine trade at its genesis. The logic was that if coca cultivation could be

stopped, then the flow of cocaine into the United States would be abrogated and countries such as Peru would be stabilized. According to officials in Washington, the cocaine economy was destabilizing the political situation in Peru and funding Shining Path's war against the state. The United States did view Shining Path as a threat but only to the extent that the insurgency challenged the political institutions of the Peruvian state, which were the same institutions Washington was using to conduct its counter-narcotics operations. This sentiment was reflected in a cable from the U.S. embassy in Lima that stated, "We are dependent on a government that is stable, democratic and capable of helping us meet our own program goals."

Throughout the 1980s, U.S and Peruvian officials attempted to address the issues that each party found more pressing. Every time U.S. policy makers pushed the Peruvians to adopt a policy that focused on counter-narcotics the insurgency grew in strength and when the Peruvian government made the counter insurgency its primary policy goal the cocaine business would make significant gains. Counter-narcotic programs proved to be especially unhelpful because not only did they manage to not eradicate any substantial amounts of coca, they also helped fuel support for Shining Path. Moreover, although the Peruvian government did help the U.S. carry out counter narcotics operations, it did so reluctantly.

As coca cultivation continued to increase, and Shining Path's war against the Peruvian government grew, officials in Washington reexamined their approach to formulating policy. It was at this juncture that officials in Washington realized that the best way to relinquish the cocaine economy was by helping the Peruvian state deal with its insurgency issue. The dissimilar goals of each government in the UHV resulted in a losing battle in both cases. Furthermore, as Shining Path's war against the state reached critical levels, Washington found Lima less and less willing to cooperate with its counter-narcotics programs. In a cable from the U.S. embassy in Lima to Washington, the country team acknowledged "the crux of the matter is that we are unlikely to get any more Peruvian support for counter narcotics activities until we help them solve their number one problem, which is subversion." American ambassador to Peru Anthony Quainton was instructed to tell Peruvian President Alan Garcia that the United States government would be willing to provide assistance to military and police forces in coca areas infiltrated by Shining Path. Unfortunately, these policy changes began to occur towards the end of the 1980's and by that time Shining Path had already substantially increased its operational capabilities. The earlier policies of U.S-Peruvian officials helped strengthen Shining Path's influence in the UHV and the inability to formulate a coherent policy until the end of the decade provided the guerrillas with plenty of time to amplify its "people's war" against the state.

Conclusion

All through the 1980s officials in Lima and Washington wasted precious time seeking to achieve the policy goals that they each had in mind. The Peruvian government was not able to effectively combat Shining Path or the cocaine economy in the UHV until both countries realized that they needed to formulate a unified policy that addressed overlapping goals. The government's inability to effectively combat Shining Path and the cocaine economy allowed for both of these groups to develop a symbiotic relationship. Shining Path used the UHV as a base of power but most importantly as a source of income that significantly augmented the insurgencies operational potential. The relationships that Shining Path established with coca farmers, drug traffickers, and even corrupt elements within the Peruvian army and police allowed the group to completely undermine any counter narcotics or counter insurgency programs in the region.

By the beginning of the 1990s Shining Path's ability to take advantage of the lack of unified policy between U.S. and Peruvian government officials in the UHV during the 1980s enabled the guerrillas to significantly challenge the democratic foundations of the Peruvian state. After the election of Alberto Fujimori to the Peruvian Presidency in 1990, the state began to severely weaken Shining Path and decrease the amount of coca production. The implementation of new laws and economic policies provided Fujimori with the ability to focus his attention on debilitating the cocaine economy, and more importantly, thwart the growing guerrilla insurgency.

Bibliography

Primary Sources:

Anonymous. "Death Threat." In *The Peru Reader: History, Culture, Politics*, edited by Orin Starn, Carlos Ivan Degregori, and Robin Kirk, 364-365. Durham: Duke University Press, 2005.

Chaname. "Drugs, Soldiers, and Guerrillas." In *The Peru Reader: History, Culture, Politics*, edited by Orin Star, Carlos Ivan Degregori, and Robin Kirk, 438-440. Durham: Duke University Press, 2005.

State Department Cable. "Discussion with President Garcia on the Andean Summit." December 8, 1989, Confidential, 8pp. Source: Freedom of Information Act Release to the National Security Archive, 7. Accessed October 19, 2011.

State Department Cable. "NSC Review of Counter-Narcotics Operations in Peru." May 28, 1989, Secret, 3pp. Source: Freedom of Information Act Release to the National Security Archive, 2. Accessed October 26, 2011.

U.S. Embassy (Lima) Cable. "Peruvian Terrorism: The Nature of the Threat." April 20, 1982, Secret, 9pp. Source: National Security Archive Request (Kate Doyle-Drug Policy), 2. Accessed October 10, 2011.

U.S. Embassy Peru Cable. "Washington Interagency Comments on Narcotics Implementation Plan for Peru." October 21, 1989, Secret, 8pp. Source: Freedom of Information Act Release to the National Security Archive, 3. Accessed October 26, 2011.

Secondary Sources:

Andreas, Peter, and Coletta Youngers. "US Drug Policy and the Andean Cocaine Industry." *World Policy Journal* 6, no. 3 (Summer 1989): 529-562.

Felbab-Brown, Vanda. *Shooting Up: Counterinsurgency and the War on Drugs*. Washington: Brookings Institution Press, 2010.

Gonzales, Jose E. "Guerrillas and Coca in the Upper Huallaga Valley." In *Shining Path Of Peru*, edited by David Scott Palmer, 123-143. New York, NY: St. Martin's Press, 1994.

Kay, Bruce H. "Violent Opportunities: The rise and fall of King Coca and Shining Path." *Journal of Interamerican Studies and World Affairs* 41, no. 3 (Fall 1999): 97-127.

Marcy, William L. *The Politics of Cocaine: How U.S. Foreign Policy Has Created a Thriving Drug Industry in Central and South America*. Chicago, IL: Lawrence Hill Books, 2010.

Menzel, Sewall H. *Fire in the Andes: U.S. Foreign Policy and Cocaine Politics in Bolivia And Peru*. Lanham, MD: University Press of America, 1996.

McClintock, Cynthia. "The War on Drugs: The Peruvian Case." *Journal of Interamerican Studies and World Affairs* 30, no. 2/3 (Autumn 1988): 127-142.

McCormick, Gordon H. *The Shining Path and Peruvian Terrorism*. Santa Monica, CA: RAND Corporation, 1987.

Palmer, David S. "Peru, the Drug Business and Shining Path: Between Scylla and Charybdis." *Journal of Interamerican Studies and World Affairs* 34, no. 3 (Autumn 1992): 65-88.

Steinitz, Mark S. "The Terrorism and Drug Connection in Latin America's Andean Region." *Policy Papers on the Americas* 13, no. 5 (July 2002): 5-8.

Strong, Simon. *Shining Path: The World's Deadliest Revolutionary Force*. London: Harpur Collins Publishers, 1992.

Tarazona-Sevillano, Gabriela, and John b. Reuter. *Sendero Luminoso and the Threat of Narcoterrorism*. New York: Praeger Publishers, 1990.

[Last Updated: 8/12/16](#)

Conflicts of Ideology in Christian and Muslim Holy War

David Levine

The holy wars of Christianity and Islam, crusade and jihad respectively, represent a conflict of ideology between two Abrahamic faiths that would be reignited with the First Crusade in 1096. What makes them different is not the wars' necessity in their respective societies, but their origins. Jihad is explicitly referred to and justified in the Qur'an and crusading came into thought nearly a thousand years after the beginning of Christianity. Practice and execution also differentiate them. For a religious contrast, where Christians viewed Muslims as worshipping a false god through a false prophet, the Muslims were more concerned with the Christians' use of anthropomorphic imagery for veneration. Thus the difference in these two ideals can be seen: crusading ideology began to take shape in the late 11th century, and was driven by a politically minded, centralized papacy; jihad existed from the beginnings of Islam, and was driven by secular leaders using religious means to their political ends. The parallels of these respective holy wars as unifying forces in otherwise fragmented societies obscure the differences in origin and execution between them, and if not for this fragmentation and various other factors neither may have been employed at all.

Historians have defined crusading broadly. For Jonathan Riley-Smith, there must be vows taken by the crusaders with papal authorization that are fulfilled through penitential warfare. Similarly, Partner argues that crusading is defined by the focus on Jerusalem and the support of Christians in the east. Prior to the formation of semi-official crusading patterns, other popes had made calls for one or more aspects of crusade that would later be compiled into official crusading guidelines by Pope Innocent III. Pope John VIII, in defense of Rome from Muslim armies, promised spiritual rewards for those who would die in defense of the church. Pope Leo IV did the same, as did Pope Alexander II. The ideology of Christian holy war was also abortively proposed by the Byzantine Empire over a century before the first Crusade, failing due to inopportune political changes and the clerical resistance.

Remission of sins was a particular focus of pre-crusading ideological patterning. According to Cowdrey, "In the eleventh century...penance was still being imposed under an older system [from] Carolingian times." There was little differentiation between what penances were appropriate for what sins, and often the masses were unsure of the remission of their sins. For the upper classes, there was a choice between endowment of a monastery, becoming a monk, or pilgrimage to holy sites like Rome and Jerusalem.

Prior to Gregory VII's reforms, the idea of warfare as penitence was unthinkable; after, armed pilgrimage became an outlet for knightly penitence, channeling the violent life of European knighthood into armies of Christ. This shift in ideology was enabled by the writings of Augustine of Hippo. Augustine sought to rationalize the violence around him, proposing that war could only be just if fought defensively, in the name of the church, and as a last option. With his reforms, Gregory VII successfully formed the ideological basis that would be later used by Urban II in calling the First Crusade: holy war was now a functional theory involving rationalization for just war, spiritual benefits, and legitimacy gained from papal leadership. The Church had developed direct authority over newly sanctioned knights. Thus with the justification of a saint and new, albeit broad definitions, crusading as an ideal became more than bits and pieces of theology and developed into a definitive formula that Urban II used only twenty years later.

Jihad draws its theological justification directly from the Qur'an. In Arabic, the word jihad translates as "striving" or "expenditure of effort;" jihad may even seem inconsequential and unimportant, given the word only appears in the Qur'an four times. Christian holy war held violence as the last resort; jihad was a "doctrine of spiritual effort, of which military action is only one possible manifestation." Jihad is and was an effort in the name of Allah, restricted by morality outlined by Allah in the Qur'an. Jihad evolved in the early Muslim community as a defensive stance around Muhammad, who had experienced a revelation that it was a sacred duty of Muslims to defend themselves when faced by pagan and polytheistic oppressors. When Muhammad was forced to flee to Medina his party had to raid caravans to survive. Those who participated in these raids believed themselves mujahedeen, those who struggle in the path to God. During this time, jihad was one of the chief duties of a Muslim. . The Qur'an speaks in sura 9 of Allah offering heavenly rewards for those who fight "idolaters and polytheists." This struggle was meant to be continuous until all peoples were united in Islam or had accepted the status of dhimmis, or protected minorities. In verses 39-40, the last verses to mention jihad in the Qur'an, regulations are set for how, when and why jihad must be waged. The regulations regarding jihad are explicitly defensive, being restrained by "right intention" and "proportionality." These verses were revealed to Muhammad during the Medinan period, when "violence was not only necessary for the defense of the Muslim community, but also unavoidable." As Donner states, "[Mujahedeen] may thus correspond to the early Christians who viewed themselves as 'soldiers of Christ'...." Like crusading, jihad saw soldiers fighting in the name of God (or Allah), but the comparison is faulty because the Muslim soldiers answered directly to Allah whereas the Christian soldiers needed intercession from the Church for their sins to be forgiven. The

distinction highlights the doctrinal differences in practice: the Church was necessary because there was no precedent for remission of sins through struggle in Christian gospel as there was in Islam. The closest similarity seen is that both holy wars gave hope of martyrdom and heavenly reward for those who fought and died in the service of God.

The societies that produced jihad and crusade must be analyzed. Carolingian government dominated Europe west of the Byzantine Empire, encompassing modern-day Italy, Germany and France, and the Carolingian dynasty was the beginning of the Holy Roman Empire. European society was held together for the most part by the leaders of the Holy Roman Empire and the people were protected by it; but once this semi-centralized government collapsed, the region split into minor monarchies and duchies. Once public authority disintegrated, lords and counts began turning to their own interests. Cowdrey states, "In France, the post-Carolingian breakdown of authority, and the gravest manifestations of feudal anarchy, seem to have reached their nadir in the generation following the year 1000." This lack of central authority would last until the papal reformation of Gregory VII. Urban II, when preaching the First Crusade, was far more in-tune with the needs and wants of a fragmented European society than any of his predecessors had been: his preachings struck the perfect note that would unite Western Europe to the greatest extent for over a century. His greatest achievement may have been his explicit break from precedent, preaching the First Crusade as an armed pilgrimage rather than an unarmed one. Bachrach repeats this in the context of remission of sin, stating that Urban "had his finger on the pulse of the western nobility with regard to their aching need to find redemption for their sinful lives."

Between the Carolingian collapse and Gregorian Reform, the clergy and laypeople needed to be protected from the wars and infighting of local lords and knights: this protection would be guided by the Peace of God. As Cowdrey writes, the original purpose of this was to place those who could not protect themselves or their property under ecclesiastical protection, such as religious persons or the poor. Measures such as this had been around for a while, but what set the Peace of God apart was that its legitimacy came from the Church, not kings. The Peace of God set the stage for the Truce of God, which, beginning in 1027 explicitly forbid all violence at certain times, such as holidays or saints' days. One account written in 1083 by the bishop of Cologne lays out the increasing number of days on which violence and fighting was prohibited. Urban would later lean on the Peace and Truce of God in calling on European nobles to stop fighting with each other. Ultimately, it was the precedent set by these notions that allowed for the unprecedented scope and spread of Urban's message. These events

certainly helped cement a precedent that Urban would later draw upon. Without these interceding steps, laymen and counts could have considered crusading alike as just another attempt by the Church of lording over the secular authorities; with the fall of the Carolingian dynasty the Church would obtain an opening for power, and with the Peace and Truce of God they would exert it.

The newfound power the Church held in Western Europe was hampered by the lack of a central leader. As mentioned above, before Pope Gregory VII the papacy was at best the first amongst equals of bishoprics. Gregory, during what historians have called "The Investiture Disputes," took on his secular contemporaries for supreme influence over the course of Europe's future. The papacy had a very clear view of their role in society: according to Brooke, the papacy's view was a unified Christian society with all authority coming from God: while spiritual and temporal power could coexist on the earth, ultimate supremacy belonged to the spiritual authorities because of their control over the salvation of men's souls. Within fifty years, the Investiture Disputes were over and the Church emerged the clear victor: Gregory's dream was fulfilled, and he would make the Church the center of the world through war.

His plans for crusading would never come to fruition in his lifetime though. Gregory's weaknesses were his reasons for calling a crusade. He called for the reunion of the Eastern and Western Churches and crusade against Robert Guiscard, the Norman duke of Apulia and Calabria. These reasons lacked a personal connection for most of Western Europe. In Rome, Gregory was constantly fighting the Normans for control over southern Italy; but in France and Germany, there was no concern for the pope's predicament. The nobles of Western Europe were too busy fighting amongst themselves to care much about the troubles of the pope. The reunion of the Eastern and Western Churches, an ostensibly erstwhile goal, failed to recognize the deep mistrust of Western Christians for their Eastern counterparts. As Menache states, "The existence of a common Christian faith did not bridge the sociocultural gap with Byzantium..." Pope Urban's preaching of the First Crusade took this suspicion into account in making the final goal Jerusalem. Pope Gregory saw European society for what it was: a politically fragmented continent of constantly feuding monarchies and duchies aching for a new path to salvation for their violent and sinful lives. He also saw a chance for reconciliation between the two churches after the Battle of Manzikert when the Byzantine army was utterly destroyed by Alp Arslan's army of Seljuk Turks. His failure to understand both the suspicion of the Eastern Church in the west and how new and unprecedented papal power was viewed, became the final step before Urban's success in preaching the First Crusade, and the political fragmentation of Western

Europe would produce the need for an armed pilgrimage to unite them under the Peace and Truce of God.

There are similarities between the political fragmentation of Western Europe and the divisions amongst Muslims in the East. The biggest difference is that the Muslims' divisions were rooted deeply in religion. From the caliphate of 'Ali, the fourth rightly guided caliph and the son-in-law of Muhammad onwards, the Sunni-Shiite split between Muslims became an unbridgeable gap underlying any superficially political divisions. In the *Kitab al-Jihad*, Ali b. Tahir al-Sulami writes: "God dispersed their unit, split up their togetherness, threw enmity and hatred between them and tempted their enemies to snatch their country from their grasp and [so] cure their hearts of them." He blames Muslim problems after the fall of Jerusalem to the Franks on internal friction that came after the "caliphs ignored this responsibility" of waging jihad as Muhammad had ordered. Al-Sulami believed that jihad was the only way to unify Muslims and that the Franks taking Jerusalem was a wake-up call to bring Muslims back to obedience under Islam. The jihad waged by the prophet, his companions, and his successors formed the Islamic empire and spread Islam from North Africa to the borders of the Byzantine Empire, and that determination would be required to expel the Franks from their lands. Unfortunately, beyond al-Sulami there are few Muslim sources available that speak of the reaction to the First Crusade in the Muslim world and even fewer that have been translated; but reaction was apathetic at best. According to Partner:

There was a reaction to the Crusades among the Damascus ulama or learned class, during the first decade of the [twelfth] century, and that the call for a jihad played a part in this reaction. But it is hard to find a Muslim government saying that it was executing a jihad against the Franks, before the 1120's.

The apathy towards uniting shown by Muslims is analogous to the warring kingdoms of Western Europe before the First Crusade. What makes them different is the message necessary to make unification possible. In Christian lands, only a political entity could unite a region already united through religion, and in Muslim lands both political and religious unity was required.

The Preaching of the First Crusade relied heavily on precedents of Pope Gregory VII's fusion of just war, papal involvement, and remission of sin into a single message. The reasons for the failure of Gregory's crusading plans have been addressed above. In Pope Urban II the papacy found the right messenger and style for preaching a successful crusade. Urban recombined religion and war, the two most "vital and deeply cherished interests of the western people," into a crusading institution. From accounts such as the *Gesta Francorum* and other historians who relied on it develops a clear

picture of Urban's message and style. Urban is said to have used guilt, an emphasis on rhetoric and theater, and an explicit focus on Jerusalem as the crusaders' goal. Guibert of Nogent says that Urban also emphasized armed pilgrimage as the only source of remission of sins for the knights of Christian Europe. Urban was also more cognizant of the wants of the French nobility that would form a large contingent in the First Crusade, which Gregory had neglected: to Urban, only "leaders of French chivalry" could lead this expedition. Munro gives a thorough topic-by-topic description of the themes Urban would have used to rouse Western Christians to crusade. Public exhortation like Urban's speech at Clermont was common in the Islamic world, and Muslim preachers of jihad used this as their medium. Preachers portrayed jihad as a religious struggle against crusaders and connected jihad with the Sunni revival under the Zengids, as al-Sulami's work indicates.

The newly resplendent papacy in Europe manufactured crusading as a threefold means to demonstrate its newfound power, to unite the warring nobles of Europe, and to recapture Jerusalem against the Muslim nonbelievers who "practiced the worship of a false god." Muslim leaders who took up the banner of jihad similarly sought to unite all or some of the Muslim lands, and after the fall of Jerusalem, to reconquer the third holiest city in Islam from the infidels who, as 'Imad al-Din al-Isfahani wrote, "...prepared war, seeking to espouse death; they launched themselves across the sea, wanting their fame to be on everybody's lips." The way the Muslims perceived the crusades greatly influenced their response as well. Muslims did not see the crusades the same way Western Christians did. To Muslims, the crusades were a "disparate series of battles against Frankish invaders." In this way, little separated these new Frankish invaders from other Muslim sultanates and caliphates that had been invading and conquering each others lands for centuries. Apathy would lead to nearly 40 years of Frankish rule with little organized Muslim response. Not until Imad ad-Din Zengi would Muslims begin to unite in any meaningful way under a banner of jihad. For Muslims, Zengi would be the step that Gregory was for Christians: Muslims needed a figure to promote a new way of unifying the Islamic world, and Zengi would be that figure. What is clear is that in both Muslim and Western Christian society, only great expeditions like jihad and crusade would unite their respectively fragmented regions. Both cases show precedent being built upon, such as Pope Urban II leaning on Pope Gregory VII's ideas and the Zengids using al-Sulami's preachings as political legitimization for jihad. Though origins differ between the holy wars of Christianity and Islam, the use of holy war in these societies illustrates the necessity of holy war in the reunification of the religiously fractured Islamic realm and the politically fractured lands of Western Christianity.

Bibliography

- Allen, S. J., and Emilie Amt, eds. *The Crusades: A Reader. Readings in Medieval Civilizations and Cultures*, VIII. Toronto: University of Toronto Press, 2010.
- Al-Sulami. "Kitab al-Jihad." 30 and 36. Zahiriyya Damascus.
- Azzam, Abdul Rahman. *Saladin*. N.p.: Pearson Education Limited, 2009.
- Bachrach, Bernard S. "Papal War Aims in 1096: The Option Not Chosen." In *In Laudem Hierosolymitani: Studies in Crusades and Medieval Culture in Honour of Benjamin Z. Kedar*, by Iris Shagrir, Roni Ellenblum, Jonathon Simon Christopher Riley-Smith, and B.Z. Kedar, 319-341. *Crusades - Subsidia 1*. Burlington: Aldershot England, 2007.
- Berger, Pamela. "Crusade and Jihad: The Wars Known as Holy." *Religion and the Arts* 5, no. 4 (2001): 484-494. JSTOR.
- Berkey, Jonathan P. *Popular Preaching and Religious Authority in the Medieval Islamic Near East*. Seattle: University of Washington Press, 2001.
- Boyd, Catherine E. "The Gregorian Reform." In *The Gregorian Epoch: Reformation, Revolution, Reaction?*, by Schafer Williams, 75-86. Boston: D.C. Heath and Company, 1964.
- Brooke, C.N.L., M.A. *The Investiture Disputes. Aids for Teachers* 4. 1958. Reprint, London: The Historical Association, 1966.
- Brooke, Zachary N. "Lay Investiture and Its Relation to the Conflict of Empire and Papacy." In *The Gregorian Epoch: Reformation, Revolution, Reaction?*, by Schafer Williams, 25-36. Boston: D.C. Heath and Company, 1964.
- Christie, Niall. "A Translation of Extracts from the Kitab al-Jihad of 'Ali ibn Tahir Al-Sulami." *Journal Asiatique*, no. 254 (1966): 206-22.
<http://www.arts.cornell.edu/prh3/447/texts/Sulami.html>.
- Christie, Niall, and Deborah Gerish. "Parallel Preachings: Urban II and al-Sulami." *Al-Masaq: Islam and the Medieval Mediterranean* 15, no. 2 (2003): 139-148.
- Claster, Jill N. *Sacred Violence: The European Crusades to the Middle East, 1095-1396*. Toronto: University of Toronto Press, 2009.
- Cowdrey, H.E.J. "The Genesis of the Crusades: The Springs of Western Ideas of Holy War." In *The Holy War*, edited by Thomas Patrick Murphy, 9-32. N.p.: Ohio State University Press, 1976.
- . "The Peace and Truce of God in the Eleventh Century." *Past and Present* 46 (February 1970): 42-67. JSTOR.
- . "Pope Gregory VII's 'Crusading' Plans of 1074." In *Outremer: Studies in the History of the Crusading Kingdom of Jerusalem*, edited by Joshua Prawer, B.Z. Kedar,

Hans Eberhard Mayer, R.C. Smail, and Yad Yitshak Ben-Tsevi, 27-40. Jerusalem: Yad Izhak Ben-Zvi Institute, 1982.

———. Pope Gregory VII, 1073-1085. New York: Oxford University Press, 1998.

Donner, Fred M. "The Sources of Islamic Conceptions of War." In *Just War and Jihad: Historical and Theoretical Perspectives on War and Peace in Western and Islamic Traditions*, edited by John Kelsay and James Turner Johnson, 31-70. Westport: Greenwood Press, 1991.

Gabrieli, Francesco. *Arab Historians of the Crusades*. Translated by E.J. Costello. Berkeley: University of California Press, 1969.

Gesta Francorum. Edited and translated by Rosalind Hill. London: Thomas Nelson and Sons, 1962.

Hamilton, Bernard. "Pope John X (914-928) and the Antecedents of the First Crusade." In *In Laudem Hierosolymitani: Studies in Crusades and Medieval Culture in Honour of Benjamin Z. Kedar*, by Iris Shagrir, Roni Ellenblum, Jonathon Simon Christopher Riley-Smith, and B.Z. Kedar, 309-318. *Crusades - Subsidia 1*. Burlington: Aldershot England, 2007.

Hillenbrand, Carole, comp. *The Crusades: Islamic Perspectives*. Edinburgh: Edinburgh University Press, 1999.

Johnson, James Turner. "Historical Roots and Sources of the Just War Tradition in Western Culture." In *Just War and Jihad: Historical and Theoretical Perspectives on War and Peace in Western and Islamic Traditions*, edited by John Kelsay and James Turner Johnson, 3-30. Westport: Greenwood Press, 1991.

———. *The Holy War Idea in Western and Islamic Traditions*. University Park: Pennsylvania State University, 1997.

Libertini, Christopher G. "Practical Crusading: The Transformation of Crusading Practice 1095-1221." In *Autour de la Première Croisade: Actes du Colloque de la Society for the Study of the Crusades and the Latin East*, edited by Society for the Study of the Crusades and the Latin East, 281-291. Paris: Publications de la Sorbonne, 1996.

Menache, Sophia. "The Communication Challenge of the Early Crusades." In *Autour de la Première Croisade: Actes du Colloque de la Society for the Study of the Crusades and the Latin East*, edited by Society for the Study of the Crusades and the Latin East, 293-314. Paris: Publications de la Sorbonne, 1996.

Munro, Dana Carleton. "The Speech of Pope Urban II at Clermont, 1095." *American Historical Review* 11, no. 2 (January 1906): 231-242.

Norton, Claire. "Crusade/Jihad as Propaganda." *Review of The Crusades, Christianity and Islam and Saladin: The Sultan and His Times*, by Jonathan Riley-Smith and Hannes Mohring. *Holy Land Studies* 9, no. 1 (2010): 107-115.

Nydell, Margaret K. *Understanding Arabs: A Guide for Modern Times*. 4th ed., 107. Boston: Nicholas Brealey Publishing, 2006.

Partner, Peter. *God of Battles: Holy Wars of Christianity and Islam*, 31-109. Princeton: Princeton University Press, 1998.

———. "Holy War, Crusade and Jihad: An Attempt to Define Some Problems." In *Autour de la Première Croisade: Actes du Colloque de la Society for the Study of the Crusades and the Latin East*, edited by Society for the Study of the Crusades and the Latin East, 333-343. Paris: Publications de la Sorbonne, 1996.

Riley-Smith, Jonathan. *The Crusades: A History*. 2nd ed. New Haven: Yale University Press, 2005.

———. "The Motives of the Earliest Crusaders and the Settlement of Latin Palestine, 1095-1100." *The English Historical Review* 98, no. 389 (October 1983): 721-736. JSTOR.

Robinson, Ian S. *Authority and Resistance in the Investiture Contest: The Polemical Literature of the Late Eleventh Century*. Manchester: Manchester University Press, 1978.

Saint Augustine. *The City of God*. Translated by Marcus Dods. New York: The Modern Library, 1950.

Silverman, Adam L. "Just War, Jihad, and Terrorism: A Comparison of Western and Islamic Norms for the Use of Political Violence." *Journal of Church and State* 44, no. Winter (2002): 73-92.

Talmon-Heller, Daniella. "Islamic Preaching in Syria During the Counter-Crusade (Twelfth-Thirteenth Centuries)." In *In Laudem Hierosolymitani: Studies in Crusades and Medieval Culture in Honour of Benjamin Z. Kedar*, by Iris Shagrir, Roni Ellenblum, Jonathon Simon Christopher Riley-Smith, and B.Z. Kedar, 61-75. *Crusades - Subsidia* 1. Burlington: Aldershot England, 2007.

Waterson, James. *Sacred Swords: Jihad in the Holy Land 1097-1291*. London: Frontline Books, 2010.

Watt, W. Montgomery. "Islamic Conceptions of the Holy War." In *The Holy War*, edited by Thomas Patrick Murphy, 141-156. N.p.: Ohio State University Press, 1976.