THE GLOBE

The George Washington University

Volume XII, Issue I, April 2025





THE GLOBE

The Globe aims to engage the undergraduate academic community in responsible global citizenship through the promotion of undergraduate international relations scholarship. The articles published in *The Globe* offer rich diversity in thought and conviction, allowing for active and vigorous debate on key policy issues in International Affairs.

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Letter from the Editor-In-Chief

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Dear Readers,

This is the second time that I address you all as Editor-In-Chief of *The Globe*, the sole student-run undergraduate research journal in International Affairs at the George Washington University, and by extension, the Elliott School of International Affairs. It is with the utmost gratitude and enthusiasm that I am able to continue this legacy and pursuits to make the Globe the innovative journal it aspires to be.

This issue marks the culmination of three months of extensive effort during the Spring 2025 term, a period that has seen us grow and evolve in remarkable ways. We focused on expanding operations, implementing updated application and submission guidelines to ensure the integrity of our publication, and expanding our staffing to new numbers. Many of these projects were conducted asynchronously, and spanned borders around the world as many of our staffers continued their dedication to our journal while working, studying abroad, and away from GW.

I am proud to say that this issue represents another landmark in the history of *The Globe*. It is our first ever issue to include several articles addressing peacekeeping, and is our fourth publication since the journal's revival in 2023. These milestones are not just a testament to the hard work of our team but also to the ambition of our journal as we continue to rebuild our presence as a publication on-campus and beyond.

Over the past three months, we have had a myriad of successes in new initiatives. In January, we expanded staffing for *The Compass*, our online short-form sister publication, providing a wider platform for GW students to publish insights into current events. In just a few month's time, we were able to further develop and rebuild our online platform to release a myriad of new articles. We also expanded our Writing and Editing Cohort to include over 70 staffers from all over the world. Furthermore, we have further expanded our submission policy and have implemented competitive standards for the highest quality articles. This move marks a significant step in broadening our horizons and enriching our content with diverse perspectives, while holding our

journal to the highest level of quality and excellence in academic research.

Of course, one must note that as our team created this issue, the field of International Affairs continued to shift in unprecedented ways. The War in Ukraine has continued despite peacekeeping efforts. The Israeli-Palestinian conflict continues, exasperating ethnocultural differences around the world as Palestinians continue to suffer and face heightened turmoil along the Gaza Strip, where several rounds of peacekeeping negotiations have failed to resolve the conflict. Meanwhile, South Korea and countries across nearly every continent face a continuous threat to democracy and its leadership. In the United States, domestic politics have entered an unprecedented time of division as Donald Trump shifts federal power structures in the faces of his allies, making executive orders and pushing Congress to propose policies that have left many in turmoil. From the Americas and the Caribbean to the Middle East and Indo-Pacific, global politics continued to evolve in an era defined by fear, conflict, and turmoil, ever reminding us of the need for informed analysis and rigorous discourse, which *The Globe* strives to provide as it continues into the present and future.

As I carry out my duties as Editor-In-Chief, I do so knowing that this journal carries with it an important lesson in the ever-changing world of politics and international affairs. Purpose, drive, and progress is not carried out only by the torches that we pass to our successors, but also by the unlit torches we give light to, as we share our spark with others to let the light burn brighter together. As you read through this issue, I encourage you to engage deeply with the perspectives, lessons, and insights provided, and use the light it provides you to broaden your understanding and initiative in the field of international affairs.

Best Wishes,

Stephanie Van Ausdeln

Editor-In-Chief

An Increase in Guns, an Increase in Violence: Challenges to Mexican Statehood

Author: Gabriel Gonzalez Mariscal❀

Abstract:

The worsening public safety crisis in Mexico has intensified concerns about the government's efforts to tackle rising violence, dominating the nation's political discourse. Over the past decade, cartel groups have increasingly militarized, solidifying control over vast regions of the country, which the government has struggled to reclaim. International observers, mainly the United States of America, have expressed alarm over Mexico's apparent inability to maintain its sovereignty. Without bold action that challenges cartel influence, Mexico's stability may face an existential threat. This paper examines the growing power of cartel influence, its implications for the legitimacy of the Mexican state, and offers targeted policy recommendations to address this escalating, yet persistently overlooked, threat.

Keywords: Mexico-US, Cartel, North America, Border Security, Mexican Sovereignty

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This year, headlines have been dominated by the escalating conflict south of the United States border, with reports pouring in from Mexico about the growing use of military-grade weaponry by cartel gangs. This is not a recent development; Mexican newspapers have been covering the militarization of the cartels since 2006.[1] Despite reassurances from recent Mexican governments, growing reports on the danger of cartel control and increasingly destructive violence suggest an alarming situation that has the potential to endanger the statehood of Mexico.[2] The growing militarization of the cartels is an apparent evolution in Mexico's ongoing internal security issue: establishing a serious threat to the ability of the Mexican state to maintain control over its own territory. If no decisive action is taken, trust in the Mexican government by besieged civilians could lead to a national crisis for the young republic.

Officials from the US Bureau of Alcohol, Tobacco, Firearms and Explosives (ATF) have highlighted rising weapons trafficking to Mexico by organized crime groups. ATF interviews held from 2008 to 2010 indicated that throughout the years, increasingly more powerful guns (semi-automatic rifles and high-grade explosive weapons) have been illegally transported to Mexico. In that same time frame, 90,000 powerful guns of US origin were seized by Mexican authorities, illustrating the dangerous increase of the gun trade between both states.[3] More recently, the Mexican government has declared that new tactics and reforms in dealing with these armed cartels are being implemented. However, government action so far has been lacking. In 2022, secretary of the Mexican Marines José Rafael Ojeda Durán broke the news that elements inside of the Mexican Marine forces had been re-selling confiscated military equipment

[1] Jorge Monroy, "¿Los cárteles mexicanos se han militarizado como aseguró AMLO?," *El Economista,* (2022).
[2] Ibid.
[3] John Bailey, "Evade, Corrupt, or Confront? Organized Crime and the State in Brazil and Mexico," *Sage Journals,* (2009).

to cartel fighters.[4] Due to there being no formal investigations launched, the amount of high-grade equipment stolen and transferred to the cartel gangs remains unknown.

What this means is that cartels have, for the better part of a decade, been acquiring hundreds of thousands of US military-grade weaponry. The consequences of this have now begun to fundamentally alter the landscape of conflicts in Mexico to one of abject threats towards civilian and state authority. Before 2006, cartels primarily relied on individual small arms and purchases from corrupt elements within the Mexican military. Most weaponry was stolen directly from the arsenal of the Mexican armed forces, whose doctrine of internal defense limited the weapons *sicarios* (cartel fighters) could get their hands on. As a result, confrontations were confined, less destructive, and limited to low-caliber small arms.[5] However, the increasing surge in illegal US arms sales to cartels has transformed street violence into a perilous and bloody struggle for authority. Indeed, after 2006, which marked the start of cartels acquiring US weaponry, recorded homicides skyrocketed. Data obtained by the National Institute of Statistics and Geography (INEGI) in 2012 describes exceeding levels of homicides to have quadrupled.[6]

Despite clear evidence of growing lawlessness, the government had adopted a passive, even dismissive stance, prioritizing political messaging over meaningful action.[7] By 2012, cartel-driven violence had surged without challenge, prompting the US State Department to issue travel warnings for ten of Mexico's 31 states—regions where government presence had all but vanished. This has coincided with a growth in cartel-involved homicides that same year,

[4] PPX Editors, "Carteles de la Droga Viven Intensas Batallas en Mexico con Miles de Víctimas: EU," *Punto por Punto,* (2022).
[5] Pedro Izquierdo, "The Toll of US Arms Trafficking to Mexico," (2021): 4, 7.
[6] Mexican Government, "INEG Crime Rate: Government, Safety and Justice," *National Institute of Statistics and Geography,* (2012).
[7] Mark Steverson, "Mexico's new drug war is more deadly than past violence," *PBS News,* (2019).

resulting in 30,000 deaths.[8] All the while, the previous Mexican administration's approach to this deepening security crisis has not only proven ineffective but has crippled the state's ability to respond to escalating cartel violence. By 2019, the cartels had become emboldened enough to directly challenge the state. During the infamous "Black Thursday," the cartels directly challenged government authority as members of the Mexican army attempted to arrest a top drug lord hiding in the city of Culiacán, Sinaloa. What was most revealing of this event was how the cartels not only enjoyed control over Culiacán, but routed the state authority. In the battle, a Mexican army helicopter was shot down using military-grade rockets, showcasing the cartel's newly acquired military weaponry which aided in their victory against the Mexican army.

Security experts like Dr. Tomás Guevara Martínez have highlighted the symbolic and material consequences of these losses: cartels are no longer just criminal actors, but alternative power structures that wield increasingly powerful physical force.[9] Yet, up until the previous Andrés Manuel López Obrador (AMLO) administration, Mexican officials have consistently downplayed the severity of the crisis. In 2022, after *sicarios* carried out coordinated bombings along the US-Mexico border, killing 11 civilians, the government responded with troop deployments but no meaningful legal or political repercussions.[10] Rather than confront organized crime head-on, or dislodge them from their strongholds, AMLO embraced a strategy of appeasement. Rejecting the aggressive tactics of his predecessors, he coined his policy *"abrazos, no balazos"* ("hugs, not bullets"). Under this policy, confrontations with cartel gunmen were

[8] CNN Wire Staff, "Travel warning: Violence spreading in Mexico," *CNN Travel*, (2012).
[9] Josué David Piña and Marcos Vizcarra, "How Did Culiacan Change After October 17? The Open Wound," *Center for U.S.-Mexican Studies,* (2020): 47-48.
[10] Gustaf Kilander, "State Department tells US citizens in Tijuana to take shelter amid explosion of gang violence," *Independent,* (2022).

discouraged and outright avoided.[11] It's no surprise that following the 2022 bombings, though the Mexican military stationed thousands of soldiers at the border, no justice was brought to the 11 people who died.[12]

The Mexican government's failure to effectively address the increase of military-grade weapons has made the cartels stronger, bolder, and more cemented. As of 2023, the cartels ranked as the fifth-largest employers in the country, and with one-third of Mexican territory being ruled by the cartels, entire urban areas have become tied to the drug trade.[13] The cartels' control over swaths of the nation not only allows for *sicario* groups to set up private sanctuaries for their operations, but also further undermines Mexican governance to its core by effectively ruling over the lives of civilians abandoned by the state. Cartels end up acting as polities over many places in Mexico where the presence of the government is not felt. They further justify their rule by ensuring political goods are secured to at least some of the locals they govern over.[14] Political goods, as delineated by political scientist Robert Rotberg, encompass security systems that theoretically only the government can provide.[15] Allowing the cartels to take governance of Mexican territory has made the state lose its monopoly over power, which gives credence to arguments of Mexico's potential for state failure.

As it is, there is ongoing debate about whether Mexico is genuinely at risk of becoming a failed state. Some argue that the national homicide rate, which is less than half that of Venezuela,

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[11] Herika Martinez, "'Abrazos no Balazos'—Evaluando las iniciativas de seguridad de AMLO," *Center for Strategic and International Studies,* (2019).
[12] NBC Staff and Telemundo, "U.S. Gov. Employees in Tijuana Told to Shelter in Place as Violence Breaks Out Across Baja California," *NBC San Diego,* (2022).
[13] Thomas Graham, "Mexican cartels are fifth-largest employers in the country, study finds," *The Guardian*, (2023).
[14] Center for Preventive Action, "Criminal Violence in Mexico," *Global Conflict Tracker,* (2024).
[15] Robert Rotberg, "Failed States, Collapsed States, Weak States: Causes and Indicators," *Brookings Institution Press, World Peace Foundation,* (2003): 51.

suggests the situation to be blown out of proportion.[16] However, this perspective overlooks a critical issue. While high homicide rates are often associated with failed states, they are not definitive indicators of state failure. A more accurate measure lies in assessing the state's monopoly on the legitimate use of force. In Mexico's case, the government's inability to stop cartel militarization and its unwillingness to seriously fight cartels head-on underscores the erosion of this fundamental monopoly.[17] Without it, the state's authority and functionality are gravely compromised.

Even when security operations are carried out, they appear performative at best. The Mexican Defense Ministry (SEDENA) and a Reuters investigation revealed that many cartel drug labs raided by the Mexican military were already abandoned.[18] US officials have grown increasingly frustrated with Mexico's unwillingness and inability to act decisively against cartels. US Senator Chuck Grassley notably accused López Obrador of waging an imaginary war on drugs, which is a sentiment shared by leading Mexican analysts.[19] Security expert Eduardo Guerrero agrees that AMLO's rhetoric and symbolic deference to criminal groups sends a dangerous message.[20] Indeed, Mexico's past refusal to take ownership or address the seriousness of the crisis, coupled with an ineffective military posture paired with cartel militarization has allowed organized crime to deepen its grip on the country. In failing to confront the cartels, the government has not only surrendered territory; it has surrendered legitimacy. Political scientists argue that for a state to exist functionally, it must be tasked with maintaining a monopoly on

[16] Maria Uribe, "Trump exaggerates Venezuelan crime drop and misleads on root causes," WUFT, (2025).
[17] James Barget, "Mexico Impunity Levels Reach 99%: Study," *Insight Crime*, (2016).
[18] Karah Rucker, "Mexico accused of 'imaginary war' on fentanyl with 95% of raids on inactive labs," *Straight Arrow News*, (2023).
[19] Chuck Grassley, "Grassley Releases Report on Abuse of U.S. Resources in Mexico," Grassley Senate (2023).
[20] Eduardo Guerrero Gutiérrez, "¿Ya nos conquistó el miedo?," *El Financiero* (2024).

power to prevent societal anarchy. Ergo, the weakening of said monopoly effectively plunges a society into a state of anarchy.[21] By this standard, Mexico finds itself in a precarious position. As criminal organizations grow increasingly militarized, the Mexican state's ability to assert control is waning, threatening its very legitimacy. Without decisive action, the nation risks spiraling into deeper insecurity, where violent non-state actors become de facto sovereigns over large swaths of territory.

As of the current situation, with cartel violence and power increasing every year, the Mexican government is no longer in a position to ignore the cartels. In the past, the US has been a present ally in combating the growth of cartels through joint Organized Crime Drug Enforcement Task Forces (OCDETF). The OCDETF intelligence networks are formed by both Mexico and the US to effectively curb the power of cartels by targeting sources of income and weapons trafficking.[22] While further cooperation with the US has been an option the Mexican government has explored, as of late, more American politicians are openly advocating for direct intervention in Mexico. Although such proposals were initially dismissed as political theater, President Donald Trump's executive order designating cartels as foreign terrorist organizations, and his continued rhetoric in favor of intervention, signal a shift in US attitudes.[23] These developments reflect the consequences of the Mexican government's lack of action against the cartels: growing skepticism of Mexico's capacity to safeguard its sovereignty. While Mexico has

[21] William Zartman, "Structuring in a Vacuum: Negotiating in the Current World Disorder," *International International Negotiation, Brill Nijhoff,* (2020): 9-10.
[22] Office of Public Affairs, "Cooperation Between United States and Mexican Law Enforcement Leads to Significant Actions Against Transnational Drug Trafficking Organization," *US Department of Justice,* (2023).
[23] The White House, "Designating Cartels and Other Organizations as Foreign Terrorist Organizations and Specially Designated Global Terrorists," *President Donald J Trump's White House*, (2025).

firmly rejected any foreign military presence on its soil, the constant suggestions of foreign intervention underscore the gravity of the crisis and the urgency for domestic reform.[24]

As a response to the increasingly deteriorating situation, Mexico has addressed the situation, notably focusing on their relationship with the US. The Mexican government has filed lawsuits against US gun manufacturers for their alleged role in enabling illegal arms trafficking. This legal action marks a positive step toward limiting the cartels' access to high-powered weaponry. Given that a majority of American voters now support more effective, stricter anti-trafficking border reform, the time to promote a more aggressive policy is now.[25] The Mexican government should, however, go further and fully commit to enhanced bilateral cooperation on border security, which is a policy that has insistently been pushed by President Trump rather than any Mexican counterparts. Increased cooperation by the US and Mexico on the border would prove fruitful.

Further relevant to US policy, lobbying on behalf of Mexican and American groups regarding more stringent background checks for acquiring US military-grade weapons would make significant progress. Although stricter gun laws may face resistance in some US states, past gun control measures show that progress is possible. In 2011, former President Barack Obama signed an executive order aimed at tracking and stopping suspicious purchases of multiple dangerous weapons. Furthermore, in 2016, the FBI overhauled background checks and processing, which has stopped more than two million guns from getting into the hands of criminals.[26] Today's political climate in the US grants an opportunity to push policies that would

[24] Brian Finucane, "Dangerous Words: The Risky Rhetoric of U.S. War on Mexican Cartels," *Crisis Group,* (2023).
[25] Jeffrey Jones, "Immigration Surges to Top of Most Important Problem List," *Gallup News,* (2024).
[26] Office of the Press Secretary, "New Executive Actions to Reduce Gun Violence and Make Our Communities Safer," *The White House,* (2016).

curb cartel power. Indeed, during Donald Trump's 2017-2021 presidency, despite his superficial objections to certain enhanced background checks, a bipartisan Appropriations Act amended gun violence prevention laws, resulting in improvements to the National Instant Criminal Background Check System.[27]

Ensuring that the cartels cannot receive access to military-grade equipment is important, as it curbs potential civilian casualties and cartel power. Nonetheless, these efforts must be paired with stronger, more consistent domestic security policies. It is not enough to cut off weapon supplies; the Mexican government must also confront the cartels head-on. The policy of "hugs, not bullets" championed by former President AMLO ultimately hindered state security forces. Conflicting mandates left the military and police unsure of their roles, and at times, explicitly discouraged from confronting cartel gunmen. This ambiguity severely undermined state authority and emboldened criminal organizations.[28] President Claudia Sheinbaum could provide a needed reframing of the war on drugs. Her election in 2024 was initially met with skepticism due to her close political ties to López Obrador. Yet, as violence escalated, Sheinbaum has adopted a markedly tougher approach to organized crime. Her administration has overseen the extradition of 29 cartel leaders to the US and significantly ramped up drug seizures, which surged from under 50,000 to over 500,000 units in her first three months in office.[29] These early measures should be bolstered by a public declaration of an end to the "hugs, not bullets" policy to signal a shift from passiveness to active confrontation.

[27] Lori Robertson, et al., "Trump's Mixed Record on Gun Control," *Annenberg Public Policy Center,* (2019).
[28] Mark Stevenson, "Mexico's president says he won't fight drug cartels on US orders, calls it a 'Mexico First' policy," *APNews,* (2024).
[29] Office of the Press Secretary, "Statement from the Press Secretary," *The White House,* (2025).

To capitalize on this momentum, Sheinbaum should leverage Mexico's expanded military infrastructure to launch a comprehensive intervention in cartel-dominated regions. Reforms initiated under López Obrador, including a 22% increase in the army's budget, a 17% boost for the marines, and the creation of the National Guard, who were authorized to patrol the streets until 2028, provided her administration with the tools for a sustained offensive.[30] However, military intervention alone cannot secure long-term stability. Sheinbaum must pair tactical military operations with a strategic reinvestment in civilian policing, reversing the 2023 funding cuts that left local law enforcement weak and fragmented.[31] As the military clears territory and dismantles cartel strongholds, well-trained and adequately funded police forces should be deployed to assume control of day-to-day governance. By restoring essential services, asserting lawful authority, and rebuilding institutional trust in these reclaimed areas, the state can begin to reassert its monopoly on power and dismantle the parallel rule cartels have established over civilian life.

The Mexican state must be prepared to maintain sustained policing efforts against cartel terror campaigns. As previously discussed, cartels' recent militarization and victories against the Mexican state allow them to leverage control over Mexican civilians. Cartels further commit violence to instill fear and project power. Their tactics go beyond traditional crime:some groups produce propaganda-style videos showcasing torture, executions, and large-scale attacks meant to intimidate both the public and the government.[32] Among the most violent is the Jalisco New Generation Cartel (CJNG), which has been responsible for a wave of atrocities: arson attacks,

[30] Jared Olson, "How AMLO Has Fueled Mexico's Drug War," *Foreign Policy,* (2022).
[31] Mariana Paz, "Van 4 años perdidos en materia de seguridad: Observatorio Ciudadano," *Vanguardia,* (2023).
[32] ICR Editors, "Fear, Lies and Lucre: How Criminal Groups Weaponize Social Media in Mexico," *International Crisis Group,* (2024).

targeted assassinations of community and business leaders, and systematic reprisals against police officers, including the murder of their family members.[33] These acts of terrorism are meant to paralyze the state's ability to respond. While deploying the military to dismantle cartel strongholds is essential, history shows that cartels often respond to military pressure by intensifying their violence and expanding their use of terror in hopes they outlast the Mexican government's will to fight.

To effectively combat this threat, the Mexican government must enhance bilateral cooperation with a more willing and firm US, not only in military and financial terms, but also through intelligence and law enforcement partnerships. The recent move by some US lawmakers to classify certain Mexican cartels as terrorist organizations opens the door for expanded legal tools: freezing cartel-linked assets, sanctioning intermediaries, and enabling prosecutors to pursue stronger charges against cartel collaborators.[34] Further assistance from the US in securing the well-being of the family members of those Mexicans and Americans fighting or opposing cartel challenges to civilian authority would need to happen if effective on-the-ground policing is to take place. A joint Mexico-US approach to intelligence gathering, including shared surveillance, cross-border task forces, and coordinated raids, could strike at the logistical and financial backbone of these groups. Strengthening Mexico-US cooperation would do more than curb the cartels' capacity for terror: it would reinforce the Mexican state's legitimacy in the eyes of its citizens. By weakening cartel influence swiftly and visibly, such efforts could galvanize

[33] Vanda Felbab-Brown, "How Mexico's Cartel Jalisco Nueva Generación rules," *Brookings Institute,* (2022).
[34] The White House, "Designating Cartels And Other Organizations As Foreign Terrorist Organizations And Specially Designated Global Terrorists," *President Donald J Trump's White House,* (2025).

public morale, restore trust in government institutions, and prevent further erosion of faith in the state's ability to protect its people and uphold national sovereignty.

From a holistic perspective, Mexico's current predicament draws unavoidable parallels to Colombia's crisis in the late 20th century. Like Mexico today, Colombia lost control over vast regions to drug-funded militias equipped with advanced weaponry.[35] Former US Senator Bob Graham, in his study of Colombia's security collapse, emphasized that strengthening state presence in non-security sectors was just as vital as military responses.[36] His recommendations, though difficult to implement, remain relevant: effective institutions lend legitimacy to the state and diminish the appeal of criminal alternatives. The launch of the Bicentennial Framework in January 2022, which replaced the Merida Initiative as the cornerstone of US-Mexico security cooperation, reflects a similar recognition.[37] While maintaining its predecessor's core objectives of disrupting organized crime, dismantling its operational networks, and strengthening the rule of law, the Bicentennial Framework places greater emphasis on building community resilience and state capacity.[38] This evolution acknowledges that lasting security cannot be achieved without addressing the social and economic roots of cartel influence. Ultimately, rebuilding the credibility and reach of Mexican institutions is critical for long-term success, not just for internal stability but for reviving Mexico's international reputation. However, no meaningful progress can occur without first confronting the cartels' stranglehold over Mexican territory and society. Their power must be broken through decisive action, both militarily and legally. The current

[35] Bob Graham, Brent Scowcroft, and Michael Shifter, eds., "Toward Greater Peace and Security in Colombia: Forging a Constructive U.S. Policy," *Council on Foreign Relations,* (2000): 7.
[36] Ibid., 1.
[37] U.S. Department of State, "Summary of the Action Plan for U.S.-Mexico Bicentennial Framework for Security, Public Health, and Safe Communities," *Bureau of International Narcotics and Law Enforcement Affairs,* (2022).
[38] Ocampomi, "The Merida Initiative", U.S. Embassy & Consulates in Mexico," (2021).

situation presents a vital opportunity. More pressingly, the urgency is clear: the longer the cartels are allowed to operate unchallenged, the greater the risk that the Mexican public will lose faith in the state's ability to govern. Reclaiming this trust, and Mexico's future, requires bold, unified action now.

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Land of the Rising Guns: Revisiting the Rationale for Fumio Kishida's Foreign Policy Shift[1]

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Abstract

This paper seeks to redefine the causal link of the foreign policy security shift under former-Japanese Prime Minister Fumio Kishida. Having ascended to office on October 4th, 2021, Kishida was tasked with navigating a complex strategic environment that had changed radically since the shifts taken under former-PM Shinzo Abe. While some prefer an explanation grounded in the heightened aggression of Japan's neighbors in Asia, neither Russia's invasion of Ukraine nor China's continued military development are sufficient rationale for Kishida's shift. Instead, this paper turns to an explanation grounded in the potential paths that the United States could take after Kishida's tenure. More specifically, this paper argues that a fear of Donald Trump returning to the United StatesPresidency was the most significant factor in Japan's deals and plans that constitute Kishida's security shift.

Keywords: Japan Foreign Policy, East Asia, Alliances, Fumio Kishida, Flashpoints, Security Building

[1] The completion of this paper would not have been possible without the help of Humza Khan (Northwestern '26) and Minjae Lee (Carnegie Mellon '27). Mr. Khan was instrumental in helping me refocus this paper in the right direction, and Mr. Lee was an incredible source of support throughout the writing process, both in initial drafts, argument refinement, and late-stage revision.

As an author, I must acknowledge their assistance. As a colleague, I am honored that they offered to aid me in the latter stages of revision of this paper. And as a friend, I must thank them profusely for their support.

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Introduction

The announcement of Fumio Kishida's decision to not seek re-election to the office of the Prime Minister was significant, but not a surprise, as Kishida's party oversaw economic failures and scarring political scandals that will come to dominate Kishida's domestic legacy.[2] The international community, however, will likely remember Kishida's active foreign policy building as the cornerstone of his premiership. Kishida joined United States sanctions and restrictions against China and Russia and consistently engaged with the US on issues in East Asia during his time in office. Kishida also developed ties with countless regional and global partners, from further working on ties with Association of Southeast Asian Nations (ASEAN) and India to signing landmark agreements with partners like Australia, the United Kingdom, and the Philippines. During an increasingly fraught time, particularly due to the recovery from the COVID-19 pandemic, Kishida served as a firm US ally and a calming force in the international sphere during his time in office.

Kishida's foreign policy demands to be discussed in the context of Japan's neighbors, Russia and China. The latter's consistent expansion in the South and East China Seas provides an underlying cause that is used to explain Kishida ramping up discussions with other countries, and Russia's invasion of Ukraine, which began six months after Kishida entered office, is described as a similar catalyst. With Kishida having left office, now is an appropriate time to revisit these supposed drivers, and whether the seemingly obvious explanations are able to sufficiently explain the changes Kishida has made. This paper will show that the focus on the actions of Xi Jinping and Vladmir Putin fails to stand up against a more thorough analysis of the status quo.

[2] Kenji Kushida, "Kishida's Legacy of Global Success, Domestic Distress," Carnegie Endowment for International Peace, August 22, 2024, https://carnegieendowment.org/research/2024/08/kishidas-legacy-of-global-success-domestic-distress?lang=en.

Pre-Kishida Foreign Policy

Japan's foreign policy started largely through economic diplomacy. After World War II, several reforms were made in Japan under the control of the United States.[3] Chief among these was Article 9 of Japan's Constitution, declaring that the nation would never maintain "land, sea, and air forces, as well as other war potential" in order to achieve the aim of peace.[4] The lack of a military force established two significant pillars of Japanese foreign policy. First, Japan became wholly reliant on the United States for military support. US bases existed in Japan as early as 1957, and became a permanent feature of the relationship after the first renegotiation of the US-Japan Agreement in 1960.[5] Since then, the military presence of the US, including its nuclear umbrella, has been one of the most important aspects of Japan's security. Second, feeling the need to influence neighboring nations without the threat of force, Japan adopted what is now known as the "Yoshida Doctrine," in which US troops would provide for Japan's security, and Japan would focus on economic development.[6] This was expanded on with the "Fukuda Doctrine" in 1977, which reaffirmed Japan's promise to never become a military power while pledging to support ASEAN and Southeast Asia through economic diplomacy.[7]

The breakaway from exclusively economic drivers of foreign policy occurred most notably under the leadership of former-Prime Minister Shinzo Abe, when Japan underwent a

[3] Tanaka, Akihiko. 2019. "Chapter 3. Japan after World War II." Seven Chapters on Japanese Modernization. JICA-Open University of Japan. Makuhari, Chiba: BS231, Apr.
[4] "The Constitution of Japan," Chapter II, Article 9 § (1946), https://japan.kantei.go.jp/constitution_and_government_of_japan/constitution_e.html.
[5] "No. 5321 JAPAN and UNITED STATES of AMERICA Agreement (with Agreed Minutes and Exchange of Notes)," 1960, https://treaties.un.org/doc/Publication/UNTS/Volume%20373/volume-373-I-5321-English.pdf.
[6] Murata Koji, "Kishida's 'Realism' Diplomacy: From the Yoshida Doctrine to Values-Based Diplomacy?," *Center for Strategic & International Studies*, June 8, 2023, https://www.csis.org/analysis/kishidas-realism-diplomacy-yoshida-doctrine-values-based-diplomacy.
[7] Takeo Fukuda, "Fukuda Doctrine Speech," https://worldjpn.net/documents/texts/docs/19770818.S1E.html.

radical security transformation with major updates to Japan's defense cooperation guidelines.[8] In the early 2000s, Japan started to engage with regional partners on a variety of issues, including piracy, disarmament initiatives, and promotion of regional stability.[9] Sociological, ideological, and institutional shifts combined in the late 1990s to move Japan away from the Yoshida Doctrine and reignited conversations about Japan's security.[10] Japan's Self-Defense Forces, created to be the minimum standard to protect the nation in accordance with Article 9, went from being perceived as a "necessary evil" to ensure that the US stayed in the region to becoming favorable and necessary to Japan's security.[11] Abe codified this public sentiment into policy, starting with the first National Security Strategy (NSS) for the nation. In December of 2013, Abe's government released the NSS, which discussed current challenges in the international community and outlined several aims for Japan to pursue, which were divided into six sections under part IV of the document.[12] Each section discussed a shift in the focus of Japan's security plans, with a focus on both developing Japan's existing domestic measures and establishing guidelines for foreign cooperation and actions. These ranged from establishing "Values-Based Diplomacy" to discussing how to strengthen the Japan-US alliance, and signaled a new era in Japan's foreign policy endeavors.

In pursuit of the goals highlighted in the NSS, Abe developed several new frameworks. His administration implemented a National Security Council, consisting of three meeting groups alongside a Secretariat and relevant agencies, designed to increase coordination of Japan's

[8] Zack Cooper and Jeffrey W Hornung, "Abe's Resignation Could Leave Japan Less Secure—and Destabilize Its U.S. Alliance," *RAND*, September 8, 2020, https://www.rand.org/pubs/commentary/2020/09/abes-resignation-could-leave-japan-less-secure-and.html.
[9] Bhubhindar Singh, "The Evolution of Japan's Security Role in Southeast Asia," *The Round Table* 99, no. 409 (August 2010): 391–402, https://doi.org/10.1080/00358533.2010.498976.
[10] Richard J Samuels, *Securing Japan : Tokyo's Grand Strategy and the Future of East Asia* (Ithaca: Cornell University Press, 2008), 71
[11] Samuels, *Securing Japan*, 71-72
[12] "National Security Strategy of Japan," December 17, 2013, https://www.cas.go.jp/jp/siryou/131217anzenhoshou/nss-e.pdf.

military and security strategies.[13] Similarly, the definition of "self-defense" was expanded to allow for *collective self-defense* (the defense of allies who are being attacked) in limited situations, reversing prior administrations' decisions to completely outlaw the practice.[14] In 2015, a year after this redefinition, Abe introduced security-focused legislation that would allow Japan to be more active in international coalitions and further expand the use of collective self-defense.[15] Additionally, Abe established the Free and Open Indo-Pacific Framework (FOIP), a policy Kishida and subsequent United States administrations continued to abide by. Three key pillars existed when Abe first articulated the proposal: establishing norms based on international law (rule of law, freedom of navigation, etc.), promoting economic prosperity, and committing to peace and stability.[16] The initiative served to refocus the aim of the US-Japan strategic alliance and to focus Japan's decision-making in Asia on securing freedom of navigation in the region and promoting prosperity for the nations of Southeast Asia.

Kishida's Policy Shift

Under Abe, Japan made its first forays into working actively with partners around the world, a departure from past behavior. Abe's focus was primarily on the economy, with security deals largely being constrained to joint exercises. Kishida's premiership saw an expansion of security deals just one year after entering office, with the publication of a new National Security Strategy that detailed the specific changes Kishida aimed to make to Japan's alliances. Whereas Abe's NSS paid lip service to a need to work with partners, Kishida articulated specific goals,

[13] "Organizations Responsible for Japan's Security and Defense," in Defense of Japan 2020 (Annual White Paper) (Japan Ministry of Defense, 2020), https://www.mod.go.jp/en/publ/w_paper/wp_2020.html.
[14] Masahiro Akiyama, "Redefining Self-Defense: The Abe Cabinet's Interpretation of Article 9 | Research," The Tokyo Foundation for Policy Research, September 3, 2014, https://www.tokyofoundation.org/research/detail.php?id=536.
[15] Ibid.
[16] Ministry of Foreign Affairs of Japan, "Sailing on the Indo-Pacific Ocean, Finding Opportunities for Prosperity the Government of Japan" (Ministry of Foreign Affairs of Japan, 2019), https://www.mofa.go.jp/files/000407643.pdf.

aims, and projects that ought to be pursued. Highlighted among these were the signing of Reciprocal Access Agreements (RAAs) and Acquisition and Cross Servicing Agreements (ACSAs). While rooted in the same precepts as Abe's, the NSS put forth under Kishida better defined the ways that Japan aimed to bolster and cooperate with international allies and established a clearer outlook and set of goals for Japan's future.

The F-X fighter program, a joint project between the UK, Italy, and Japan to develop a strike fighter to replace Japan's current fleet, serves as a notable example of Kishida's comparative aggressiveness.[17] One of the most significant defense projects Japan has undertaken, the F-X fighter program is the culmination of pre-existing deals completed under Kishida's watch. While the F-X program was announced in December 2022, the UK and Japan had already agreed to jointly work on systems that would be integrated into the program, namely with fighter sensors and air-to-air missiles.[18] The pursuit of these further collaborations signals Kishida's aggressiveness in promoting Japan's security.

That expansion of cooperation also includes fields that have military and civilian applications. In May 2023, ahead of that year's G7 Summit, then-British Prime Minister Rishi Sunak and Kishida signed a deal to jointly collaborate on semiconductor development, with the justification that it would help ensure chip development is maintained even if Taiwan, the primary producer of chips, gets caught in a conflict.[19] Maintaining protection of chip supply chains falls in line with the technology security aims described by Abe in his NSS, and it reveals

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[17] Mari Yamaguchi, "Japan to Jointly Develop New Fighter Jet with UK, Italy," *AP News*, December 9, 2022, https://apnews.com/article/business-japan-united-kingdom-government-states-219e0adadd5f14b115766141cd0c5f6f .

[18] Ashish Dangwal, "After Engines for Stealth Fighters, UK, Japan to Co-Develop Joint New Air-To-Air Missile (JNAAM) - Tokyo," *EURASIAN TIMES*, February 24, 2022, https://www.eurasiantimes.com/uk-japan-to-co-develop-joint-new-air-to-air-missile-jnaam-tokyo/.

[19] Andrew McDonald, "UK and Japan to Boost Defense and Chips Ties ahead of G7," *POLITICO*, May 18, 2023, https://www.politico.eu/article/uk-japan-boost-defense-chips-semiconductors-ties-g7/.

the continuation of Abe's strategic goals through Kishida's new concrete strategies. In a similar vein, Mitsubishi's acquisition of a contract from the Australian government shows the continued cooperative expansion. Under the contract, the company will develop laser technology to be used for surveillance in Australian defense platforms.[20] The development will serve to both help civilian laser applications and future Japanese security applications, all with initial support and designs from the Australian Defense Force. Notably, the Mitsubishi deal remains the first partnership between a Japanese firm and a foreign government, signaling a move towards public-private partnerships that's being encouraged by Kishida's government.

Beyond the US-Japan alliance, Japan currently holds just six ACSAs with other countries: Australia, the United Kingdom, Canada, France, India, and most recently, Germany.[21] Kishida's premiership only oversaw the signing of the Germany ACSA, which took place in January of 2024. Where Kishida's government has been significantly more active, however, is in the negotiations surrounding Reciprocal Access Agreements (RAAs). Unlike ACSAs, which primarily exist to facilitate the exchange of goods and services used by militaries, RAAs are frameworks which provide ways for partner nations to more easily and effectively conduct military exercises and action together, without necessarily having to commit to the defense of the other.[22]

Under Kishida's leadership, Japan signed its first three RAAs. An in-principle agreement with Australia, signed by PM Yoshihide Suga, was negotiated and signed as a RAA under

[20] Mitsubishi Electric Corporation, "MITSUBISHI ELECTRIC News Releases Mitsubishi Electric Australia and Australian Department of Defence Agree Joint Development of Laser Technology to Enhance Surveillance and Survivability of Defense Platforms," MITSUBISHI ELECTRIC Global Website, 2020, https://www.mitsubishielectric.com/news/2023/1019.html.
[21] The Japan Times. "Japan and Germany Sign Military Supply-Sharing Pact," January 29, 2024. https://www.japantimes.co.jp/news/2024/01/29/japan/japan-germany-military-supply-pact/. Archived at May 10th, 2024, at the Wayback Machine
[22] Ministry of Foreign Affairs of Japan, "Japan-Australia Reciprocal Access Agreement," Ministry of Foreign Affairs of Japan, January 6, 2022, https://www.mofa.go.jp/a_o/ocn/au/page4e_001195.html.

Kishida in January 2022.[23] The United Kingdom RAA, on the other hand, was almost entirely negotiated by Kishida. The official commencement of negotiations started the day before Kishida took office, with the first formal set of negotiations happening just 10 days later.[24] The agreement was formally signed in January of 2023 and came into effect ten months later.[25]

The most recent of the RAAs is that of the Philippines, signed on July 8, 2024. The Philippines have long been a partner of Japan. The most recently published statistics by the Japan's Ministry of Foreign Affairs places the Philippines as the third highest overall and single highest East Asian recipient of Japan's Official Development Assistance (ODA).[26] From a military perspective, the countries have grown much closer in recent years. New agreements to facilitate the transfer of military radar equipment to the Philippines were reached in November 2023, complementing earlier deals to transfer similar equipment.[27] The Philippines was also selected to be one of the first nations to receive assistance under Japan's new Official Security Assistance program, which unlike ODA, will allow for the easier transfer of equipment to the

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[23] Donald Rothwell, "Legal Hurdles Remain in the Australia–Japan Reciprocal Access Agreement | East Asia Forum," East Asia Forum, November 30, 2020, https://eastasiaforum.org/2020/12/01/legal-hurdles-remain-in-the-australia-japan-reciprocal-access-agreement/.; Reuters, "Japan, Australia Sign Defence Pact for Closer Cooperation," *Reuters News*, January 6, 2022, sec. Asia Pacific, https://www.reuters.com/world/asia-pacific/japan-australia-sign-defence-cooperation-pact-2022-01-06/.; United States Department of Defense, "United States-Japan-Australia Trilateral Defense Ministers' Meeting (TDMM) 2024 Joint Stat," U.S. Department of Defense, May 3, 2024, https://www.defense.gov/News/Releases/Release/Article/3764063/united-states-japan-australia-trilateral-defense-ministers-meeting-tdmm-2024-jo/.

[24] Ministry of Foreign Affairs of Japan, "Commencement of Negotiations on the Japan-UK Reciprocal Access Agreement," Ministry of Foreign Affairs of Japan, September 28, 2021, https://www.mofa.go.jp/press/release/press4e_003044.html.

[25] Al Jazeera, "Japan, UK Sign 'Hugely Significant' Defence Deal," www.aljazeera.com, January 12, 2023, https://www.aljazeera.com/news/2023/1/12/japan-uk-sign-hugely-significant-new-defence-deal.; Ministry of Foreign Affairs of Japan, "Exchange of Diplomatic Notes for Entry into Force of Japan-UK Reciprocal Access Agreement," Ministry of Foreign Affairs of Japan, September 15, 2023, https://www.mofa.go.jp/press/release/press4e_003298.html.

[26] Ministry of Foreign Affairs of Japan, "White Paper on Development Cooperation 2022," Ministry of Foreign Affairs of Japan, May 30, 2024, https://www.mofa.go.jp/policy/oda/pagew_000001_00184.html.

[27] Aaron-Matthew Lariosa, "Japan Grants Security Assistance to the Philippines, Looks to Enhance Military Cooperation," *USNI News*, November 9, 2023, https://news.usni.org/2023/11/09/japan-grants-security-assistance-to-the-philippines-looks-to-enhance-military-cooperation.

militaries of "like-minded nations" (albeit with the condition that equipment must be non-lethal).[28] In April 2024, Biden invited both Kishida and Philippines President Ferdinand Marcos to Washington to discuss growing challenges and potential collaboration opportunities in Southeast Asia.[29] All of that has now culminated in the official signing of the Reciprocal Access Agreement between the countries, Japan's third and first with a "non-Western" partner.[30] The signal put forth by this deal is that the nations will aim to continue working together, which is amplified by the geographic location of both partners. Through the RAA and other joint exercises, Japan and the Philippines are signaling that their similarities stretch beyond having the US as a major ally and that they are ready to counter Chinese aggression moving forward.

Looking at less significant partners reveals a similar trend. Prabowo Subianto, the President of Indonesia, visited Japan shortly after getting elected into office with the aim of continuing to develop the relationship between Indonesia and Japan.[31] Former Thai Prime Minister Prayut Chan-o-cha reached a new defense cooperation deal with Kishida in May of 2022, which focused on the transfer of new hardware and technology.[32] In December of 2023, Kishida reached an agreement to transfer both financial aid and equipment to boost Kuala Lumpur's maritime security.[33] With ASEAN, Kishida announced an implementation plan for 130

[28] Ibid.
[29] The White House, "Joint Vision Statement from the Leaders of Japan, the Philippines, and the United States," The White House, April 12, 2024, https://www.whitehouse.gov/briefing-room/statements-releases/2024/04/11/joint-vision-statement-from-the-leaders-of-japan-the-philippines-and-the-united-states/.
[30] Mikhail Flores and Karen Lema, "Philippines Says Pact with Japan Takes Defence Ties to Unprecedented High," *Reuters News*, July 8, 2024, https://www.reuters.com/world/asia-pacific/philippines-japan-sign-landmark-defence-deal-2024-07-08/.
[31] Reuters, "Indonesia's Prabowo Pledges Cooperation with Japan, Closer China Ties," *Reuters News*, April 3, 2024, https://www.reuters.com/world/asia-pacific/indonesias-prabowo-pledges-cooperation-with-japan-after-promising-china-closer-2024-04-03.
[32] Ministry of Foreign Affairs of Japan, "Japan's Foreign Policy by Region," in *Diplomatic Bluebook 2023* (Ministry of Foreign Affairs of Japan, 2023), https://www.mofa.go.jp/policy/other/bluebook/index.html, 75
[33] Sakura Murakami, "Japan and Malaysia Sign $2.8 Mln Maritime Security Assistance Deal," *Reuters News*, December 16, 2023, https://www.reuters.com/world/asia-pacific/japan-malaysia-sign-28-mln-maritime-security-assistance-deal-2023-12-16/.

projects during a special summit in December of 2023, building on groundwork established by Abe to help deepen cooperation and multilateral operations between all member states and Japan.[34] That has even extended to South Korea, with South Korean Defense Minister Shin Wonsik stating that the nation would be signing a trilateral pact with the US and Japan to bolster security cooperation.[35]

Whether through RAAs or equipment transfers, Kishida made it a point to build a security network for Japan by working with partners beyond the United States, a stark departure from previous administrations and a signal of a new set of aims for Japan. This fact brings to light a very simple question with potentially widespread ramifications: what reason did Kishida have for embarking on his aggressive deal-making?

Dominant Explanations

Current explanations of Kishida's foreign policy shift predominantly focus on continued provocations from China, with Russia serving as a catalyst that risks an escalation of tensions. Hitoshi Tanaka, Chairman of the Institute for International Strategy at the Japan Research Institute, wrote in 2021 that the "biggest foreign and security policy challenge facing the Kishida government is how to…cope with China."[36] He argued that, at the time, the tensions between the United States and China were the most prominent challenge that Kishida would have to face, particularly due to the mix of "military confrontation, political competition, economic

[34] Mari Yamaguchi, "Japan and ASEAN Bolster Ties at a Summit Focused on Security and Economy amid Tensions with China," *AP News*, December 17, 2023, https://apnews.com/article/japan-asean-summit-maritime-security-china-8ff28376dc10f9a5f95b93c4c7c7c7dc.
[35] Soo-Hyang Choi, "US, South Korea, Japan to Lock Security Ties before Inauguration," *Bloomberg.com*, June 16, 2024, https://www.bloomberg.com/news/articles/2024-06-16/us-south-korea-japan-to-lock-in-security-ties-before-inauguration.
[36] Hitoshi Tanaka, "East Asia Insights | the China Challenge and US-Japan Relations under Fumio Kishida - JCIE," JCIE, December 2021, https://jcie.org/analysis/east-asia-insights/eai202112/.

coexistence, and cooperation on shared global challenges" that the US and China would have. Similar arguments have been voiced by the likes of Ayumi Teraoka and Ryo Sahashi, who argued that the security policy shift under Kishida is largely a consequence of "Japan's deteriorating security environment," with "China's more assertive behaviour, North Korea's growing nuclear arsenal, and Russia's unrepentant violation of international law,"[37] That combination, they argue, has pushed Japan to develop independent counterstrike capabilities and to rethink the current security strategy with the US.[38]

Certain aspects of this argument hold true. Chinese actions particularly challenge Japanese leadership, despite Abe's attempts to defrost the relationship between the neighbors. Of the many challenges, the most significant potential flashpoint remains Taiwan, with Kishida having expressed concerns that the island would become a "new Ukraine".[39] Robert Ward and Yuka Koshino further described instances of Chinese aggression that increase tensions:[40]

> … the increasingly strong rhetoric from Chinese President Xi Jinping regarding Beijing's intent to absorb Taiwan into the People's Republic of China; China's intense territorial needling around the Senkaku/Diaoyu islands, which Japan controls and China claims; and the rapid rise in China's military spending, which is now estimated to be some five times larger than that of Japan.[41]

That range of tensions is echoed by several other scholars. Some argued that most recent developments in the US-Japan relationship, such as new command-and-control arrangements and

[37] Ayumi Teraoka and Ryo Sahashi, "Japan's Revolutionary Military Change: Explaining Why It Happened under Kishida," *Pacific Affairs* 97, no. 3 (September 2024), https://doi.org/10.5509/2024973-art1, 520
[38] Teraoka and Sahashi, "Japan's Revolutionary Military Change: Explaining Why It Happened under Kishida,"
[39] Robert Ward and Yuka Koshino, "Japan Steps Up: Security and Defence Policy under Kishida," in *Asia-Pacific Regional Security Assessment 2023*, ed. Dr. Tim Huxley and Dr. Lynn Kuok (International Institute for Strategic Studies, 2023), https://www.iiss.org/publications/strategic-dossiers/asia-pacific-regional-security-assessment-2023/, 120
[40] Ward and Koshino, "Japan Steps Up", 120-121
[41] See endnotes for further detail

weapons-building agreements, are largely to address Chinese actions.[42] That's also highlighted by the involvement of the Philippines in a joint summit with the US, which signals a desire from both the US and Japan to check back against Chinese ambitions in the SCS, with the nations expressing in a joint statement "serious concerns about the People's Republic of China's (PRC) dangerous and aggressive behavior in the South China Sea."[43] Others point to the accelerated development of military technology from Beijing, with the development of "a large blue-water navy" and "ballistic and cruise missiles" that pose a potential threat to Japan.[44] The 2010s building of artificial islands is also discussed as a new source of tension, along with the pre-existing tensions.

However, there are those that argue China's current trajectory is creating a strategic environment that helps Japan. Kenichiro Sasae, former Japanese Ambassador to the United States, argues that China's military build-up has not had a major impact on Japan's recent foreign policy making, and that Japan's security shift is better explained through another lens.[45] He cites several reasons for this. According to Sasae, the general consensus in Japan through the majority of Kishida's tenure was that "Chinese military technology is still 15–20 years behind that of Western nations."[46] Sasae also points to the increasingly predictable relationships between the two powers, with "China's criticism of the danger of Japanese militarism" largely subsiding in recent years.[47] Critically, Sasae points to the improvement of ties between the US and China during the Biden Administration, which facilitates easier relations for all three nations

[42] Mike Watson, "Japan's Foreign Policy Revolution," *The Washington Free Beacon*, April 13, 2024, https://freebeacon.com/national-security/japans-foreign-policy-revolution/.
[43] The White House, "Joint Vision Statement from the Leaders of Japan, the Philippines, and the United States"
[44] Adam P. Liff, "Kishida the Accelerator: Japan's Defense Evolution after Abe," *The Washington Quarterly* 46, no. 1 (January 2, 2023): 63–83, https://doi.org/10.1080/0163660x.2023.2192138.
[45] Kenichiro Sasae, "Chapter Twenty: Rethinking Japan–US Relations: Security Issues," *Adelphi Series* 62, no. 498-501 (November 2, 2022): 411–46, https://doi.org/10.1080/19445571.2022.2281804, 415-418
[46] Sasae, "Rethinking Japan-US Relations", 415
[47] Sasae, "Rethinking Japan-US Relations", 416

simultaneously.[48] Given the improvement in both US-China and China-Japan relations before and during Kishida's administration, it seems increasingly unlikely that the driving force behind Kishida's modernization comes down to Chinese tensions in the region.

That rhetoric is echoed by Kishida's own words. When speaking at Johns Hopkins University in January 2023, Kishida described the Japan-China relationship as one that has to remain peaceful.[49] In his words, "China needs to make a strategic decision that it will abide by the established international rules and that it cannot and will not change the international order in ways that are contrary to these rules," and in order to achieve that, Japan needs to "cooperate on shared challenges" with Beijing. These remarks suggest that Kishida views China with ambivalence: China may be a challenge, but it is not a threat and can be reasoned with.

Putin, on the other hand, is a more volatile actor. If China is discussed by scholars as the fuel for Kishida's shift, Russia's invasion of Ukraine is the spark. Public polls and interviews with senior officials revealed that Putin's invasion of Ukraine sparked fears about the potential for similar Chinese military action in Taiwan.[50] Scholars often point to the shift in the relationship between Russia and Japan—and between Putin and Abe more specifically—to further highlight the invasion as a catalyst. Abe's foreign policy of neutrality meant that he collaborated with a range of partners, which included an 8-point deal with Russia during the Sochi Olympics.[51] The deal signaled a minimum degree of ambivalence towards Putin, but that changed under Kishida's premiership. The invasion of Ukraine, and Japan's response in calling

[48] Sasae, "Rethinking Japan-US Relations", 416-417
[49] Fumio Kishida, "Policy Speech by Prime Minister KISHIDA Fumio" (January 13, 2023), https://www.japan.go.jp/kizuna/2023/02/decisions_in_foreign_and_security_policy.html.
[50] Teraoka and Sahashi, "Japan's Revolutionary Military Change: Explaining Why It Happened under Kishida", 523
[51] Paul O'Shea and Sebastian Maslow, "Rethinking Change in Japan's Security Policy: Punctuated Equilibrium Theory and Japan's Response to the Russian Invasion of Ukraine," *Policy Studies* 45, no. 3-4 (January 31, 2024): 1–24, https://doi.org/10.1080/01442872.2024.2309218, 661

out Russia, signal a departure from the shared history of Russia and Japan, which would indicate that Kishida's shift may be caused by challenges with Putin. Kishida's National Security Strategy points to this as well, with explicit mentions being made to the Sea of Okhotsk and Russian nuclear submarines around the Northern Territories, which Japan lays claims to.[52] Similarly, Russian collaboration with China poses a threat given the focus on joint exercises and drills, including "joint flights of their bombers in the vicinity of Japan."[53] The fear of an escalation from Russia remains at the top of decision-makers minds, especially after the invasion of Ukraine. Putin's tendency to act aggressively in the international sphere, combined with the threat of nuclear weapons, makes Russian aggression a major challenge, even if it is not the most important one facing Japanese politicians.

However, there are two major incongruities that go unaddressed by many scholars on the subject of Russia, the first being that the timeline cannot support this being a causal relationship. Despite many of Kishida's actions coming after the invasion of Ukraine, the groundwork for those actions started well before. Key examples of this include the Reciprocal Access Agreements with Australia and the United Kingdom: landmark decisions whose discussions started before Russia's invasion.

In addition, there's a fundamental difference in the context. Putin's actions against Ukraine did not risk entrapment in the same way that a conflict with Japan would. Ukraine lacked formal treaties with the United States and NATO, which meant that nations in Europe were under no obligation to directly challenge an invasion; this is in contrast to Japan, where the treaty with the US would mean any perceived escalation from Russia would be met by a US

[52] "National Security Strategy of Japan" (2022), https://www.cas.go.jp/jp/siryou/221216anzenhoshou/nss-e.pdf, 10
[53] "National Security Strategy of Japan" (2022), https://www.cas.go.jp/jp/siryou/221216anzenhoshou/nss-e.pdf, 10

response. Consequently, as none of Kishida's significant shifts could have been motivated by Putin's invasion of Ukraine, we are left to seek another explanation.

Adding to the mix is the military expenditure from Japan in the years leading up to Russia's invasion. While Kishida had announced a mass increase in expenditure, it is notable that there has been a general increase in spending since 2017, whether that is through nominal currency or as a percentage of Japan's GDP (see Figures 1 and 2 in the Appendix).[54] While Kishida did announce his military expenditure plan ten months after Russia's invasion began, it largely came as an extension of what was already happening in the country, not as a sudden change as a consequence of Russia's invasion.

The Trump Threat

While scholars briefly allude to the consideration of the United States in Japanese foreign policy, it is often brought up as a minor issue if not provided to give historical context to Japanese reliance on the United States.[55] While Abe managed to maintain amicable relations with the US during Trump's presidency, it is the risk of another Trump presidency that posed the greatest threat to Kishida's administration.[56] Prominent scholars argue that Trump diverged from other presidents in his intent to "abdicate America's postwar role as the leader of the liberal order," as described by Yoichi Funabashi and G. John Ikenberry, and most commonly seen with his increasing decision to treat alliances as transactional.[57]

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[54] The World Bank, "World Development Indicators," The World Bank, 2024, https://databank.worldbank.org/source/world-development-indicators.
[55] See Liff, "Kishida the Accelerator"; Sasae, "Rethinking Japan-US Relations"
[56] Michito Tsuruoka, "Tokyo's Awakening: Japan in the Indo-Pacific after Russia's Invasion of Ukraine | DIIS," www.diis.dk, January 4, 2023, https://www.diis.dk/en/research/tokyos-awakening-japan-in-the-indo-pacific-after-russias-invasion-of-ukraine.
[57] Yoichi Funabashi and G. John Ikenberry, *The Crisis of Liberal Internationalism: Japan and the World Order*, *Brookings Institution Press EBooks* (Brookings Institution Press, 2020), http://www.jstor.org/stable/10.7864/j.ctvbnm3nv, 6

The Ramifications of Trumpist Isolationism

Trump's anti-global rhetoric was a cornerstone of his first presidency and remains a key part of his "Make America Great Again" promise. In a speech delivered to the United Nations in 2019, Trump rallied against globalism, arguing that previous leaders had a "religious pall" over them which was "causing them to ignore their own national interests."[58] Under his presidency, Trump pulled out from deals like the Paris Agreement, revisited the Joint Comprehensive Plan of Action (JCPOA) and North American Free Trade Agreement (NAFTA) , left groups like the United Nations High Commissioner for Refugees (UNHCR) and World Health Organization (WHO), and generally flew against international norms established by previous United States Presidents.[59]

Despite initially claiming Russia was one of the US's biggest threats, Trump's actions during his presidency actively weakened NATO and allowed Putin to consolidate power, whether through his Syria policy, which allowed Putin to take over US military bases, or his constant requirements to have American allies pay their fair share.[60] While many point to NATO as an example of this, Trump's ire toward allies for not paying enough also extended to Japan. The "Cost Plus 50" plan would have transferred all costs of hosting US troops to host nations.[61] That would have led to a 300% increase in defense expenditures for Japan. While the plan didn't go through, it demonstrated Trump's willingness to put allies on the line.

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[58] Julian Borger, "Donald Trump Denounces 'Globalism' in Nationalist Address to UN," *The Guardian*, September 24, 2019, sec. US news, https://www.theguardian.com/us-news/2019/sep/24/donald-trump-un-address-denounces-globalism.
[59] Council on Foreign Relations, "Trump's Foreign Policy Moments," Council on Foreign Relations, 2021, https://www.cfr.org/timeline/trumps-foreign-policy-moments.
[60] Brian Katulis and James Lamond, "Russian Flags over an American Base," *Center for American Progress*, December 6, 2019, https://www.americanprogress.org/article/russian-flags-american-base/.
[61] Lara Seligman and Robbie Gramer, "Trump Demands Tokyo Quadruple Payments for U.S. Military Troops in Japan," *Foreign Policy*, November 15, 2019, https://foreignpolicy.com/2019/11/15/trump-asks-tokyo-quadruple-payments-us-troops-japan/.

There is also evidence that shows that Trump was willing to hurt Japan if he perceived doing so to be beneficial for himself. Trump's decision to pull-out of the Trans-Pacific Partnership (TPP) was a major shock. The TPP was negotiated by 12 Pacific Rim countries to lower tariffs, promote cooperation, and boost trade.[62] Trump's withdrawal left Abe scrambling to maintain a version of the TPP, but it demonstrated Trump's willingness to depart "bad deals" if perceived that way.[63] This is in addition to Trump's rhetoric on the US-Japan relationship. In 2019, Trump publicly decried the US-Japan Security Treaty as being overly favorable to Japan, claiming that "if Japan is attacked, we will fight World War III. But if we're attacked, Japan doesn't have to help us at all. They can watch it on a Sony television."[64] The comment spurred concerns in Japan that Trump was testing the boundaries of the relationship, and that he might leave Japan out to dry. Furthermore, Trump has maintained his stance on having allies pay more. Watanabe Tsuneo, a senior fellow at the Sasakawa Peace Foundation discusses the "You got to pay your bills" comments made by Trump in February 2024.[65] While Tsuneo argued that Japan is not likely to face Trump's ire on spending, his rationale was that Kishida had already started increasing Japan's military expenditure. Moreover, Tsuneo recognizes that Trump's rhetoric is inherently destabilizing, with particular regard to Trump saying that he "would encourage [Russia] to do whatever the hell they want."

The most common response to a fear of Trump is that his anti-China stance will incentivize him to keep Japan close, even if there are other tensions. In theory, this is true.

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[62] James McBride, Andrew Chatzky, and Anshu Siripurapu, "What's next for the Trans-Pacific Partnership (TPP)?," Council on Foreign Relations (Council on Foreign Relations, September 20, 2021), https://www.cfr.org/backgrounder/what-trans-pacific-partnership-tpp.
[63] Cheang Ming, "Global Trade Just Had a 'One Step Forward, One Step Back' Day," *CNBC*, March 9, 2018, https://www.cnbc.com/2018/03/09/tpp-11-countries-sign-trade-agreement-as-trump-implements-tariffs.html.
[64] Gary J Bass, "Opinion | Trump's Ignorant Comments about Japan Were Bad Even for Him," *The New York Times*, June 28, 2019, https://www.nytimes.com/2019/06/28/opinion/trump-japan.html.
[65] Watanabe Tsuneo, "A Trump 2.0 Administration and the US-Japan Alliance: Little Reason for Uneasiness," *Nippon.com*, July 16, 2024, https://www.nippon.com/en/in-depth/d01013/#.

Trump's China Initiative, trade war, and Indo-Pacific framework are a few examples of the range of policies he took to counter Chinese actions, and it's a rhetoric that he maintains.[66] However, as alluded to earlier, Trump competes with China primarily on economics, not security and defense concerns. The aforementioned set of actions illustrates this best, most obviously in the trade war. The China Initiative did not focus on broader security concerns, but specifically on economic espionage and was largely targeted against Chinese academics studying and working in the US.[67] And even though Trump shared the Free and Open Indo Pacific vision, Trump's trade war constantly dominated the conversation, as opposed to active discussions on how to counter more direct Chinese threats. This is also mirrored in official documents from his administration. The "United States Strategic Approach to the People's Republic of China," published in 2020 had a mere half page of 16 dedicated to security challenges, with a substantial portion of that being focused on the operation of Chinese firms in the United States.[68] Trump's 2017 National Security Strategy was similarly skewed, with the need to "pursue bilateral trade agreements on a fair and reciprocal basis" taking precedence over bolstering US security measures.[69] Looking beyond just the Asia section, it is notable that other references to competition with China are viewed through an economic lens. Whether arguing that "competitors such as China steal U.S. intellectual property" or that the US must "contest China's unfair trade and economic practices" in Europe, the Trump administration has communicated that its greatest contention against China was its

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[66] Bethany Allen-Ebrahimian, "Special Report: How U.S. Policy toward China Transformed under Trump," Axios, January 19, 2021, https://www.axios.com/2021/01/19/trump-china-policy-special-report.
[67] The United States Department of Justice, "Information about the Department of Justice's China Initiative and a Compilation of China-Related Prosecutions since 2018," www.justice.gov, July 31, 2020, https://www.justice.gov/archives/nsd/information-about-department-justice-s-china-initiative-and-compilation-china-related.
[68] The White House, "United States Strategic Approach to the People's Republic of China," *Trump White House Archives* (The White House, May 26, 2020), https://trumpwhitehouse.archives.gov/articles/united-states-strategic-approach-to-the-peoples-republic-of-china/.
[69] The White House, "National Security Strategy of the United States of America," *Trump White House Archives* (The White House, 2017), https://trumpwhitehouse.archives.gov/wp-content/uploads/2017/12/NSS-Final-12-18-2017-0905.pdf, 46-47

economic strength, not the threat it posed to American allies.[70] Further examples of this include Trump's rhetoric around Taiwan, with claims that Taiwan ought to pay the US for defense against China, a stark contrast to the support from other administrations.[71] Trump's focus consistently remains on promoting the US economy above all, even if it jeopardizes security for US partners.

While the economic focus is one aspect of Trump's policy, another problematic angle is his adoration and support of authoritarian leaders. In 2019, after a North Korean missile test, Trump publicly declared that North Korean missile testing was not a major concern because the missiles were short-range.[72] Trump's claim dismissed the threat that the missiles posed to Japan, which continued in a series of similar incidents. At a summit with Russian president Vladmir Putin in July 2018, Trump agreed with Putin's claims that Russia never interfered in the US election, despite clear evidence to the contrary from US intelligence agencies.[73] Towards Xi, Trump often had praise, whether for becoming "president for life" after the CCP removed term limits, or constantly tweeting about the "great job" Xi was doing during the pandemic.[74] This rhetoric contributed to a broader perception that, despite Tokyo's main concerns, Trump would be willing to throw allies under the bus in favor of authoritarian leaders. Whether or not that is true is moot: the perception alone was sufficient to incentivize a change under the Kishida administration.

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[70] The White House, "National Security Strategy" (2017), 21; The White House, "National Security Strategy" (2017), 48

[71] Dylan Butts, "Taiwan under Pressure to Bolster Its Defense as Trump-Harris Presidential Race Stokes Policy Concerns," *CNBC*, August 5, 2024, https://www.cnbc.com/2024/08/05/taiwan-under-pressure-to-bolster-defense-amid-trump-harris-election-race.html.

[72] Alex Ward, "In Japan, Trump Broke a Cardinal Rule of Being America's President," *Vox*, May 28, 2019, https://www.vox.com/2019/5/28/18642441/japan-trump-abe-biden-kim-missile.

[73] Ibid.

[74] David Shepardson, "Trump Praises Chinese President Extending Tenure 'for Life,'" *Reuters*, March 4, 2018, https://www.reuters.com/article/world/trump-praises-chinese-president-extending-tenure-for-life-idUSKCN1GG03P/; Myah Ward, "15 Times Trump Praised China as Coronavirus Was Spreading across the Globe," *POLITICO*, April 15, 2020, https://www.politico.com/news/2020/04/15/trump-china-coronavirus-188736.

Tokyo's Response

In truth, it is Trump's rhetoric, and a fear of what could come should he return, that best connects the series of otherwise disjointed actions taken by Kishida's government. For starters, a summit between Seoul, Tokyo, and Washington held in August 2023 at Camp David focused on "institutionalizing" ties between the nations.[75] The driving force, according to experts, was a concern about "Trump-like ambivalence" from a president rising to power. In January 2024, Kishida sent Tarō Asō, vice president of the Liberal Democratic Party, to the United States to attempt to meet Trump, to begin building a relationship with Trump should he be re-elected.[76] Kishida's decision to send Asō also reveals a deeper and newfound aspect of foreign policy: Trump could be even more radical than before, and getting ahead of that is absolutely vital. This is prominently stated in public discourse surrounding the question of *moshitora*, which translates to "what if Trump?" The fear is that another Trump presidency could leave Japan vulnerable to an American withdrawal, especially if a deal between Trump and Xi emerged on trade.[77] Sasae described it as "a fundamental orientation of where America is heading toward," with the primary question being "Is America going to abandon us?" In March 2024, those concerns escalated, with some in the public replacing *moshitora* with *hobotora*, meaning "likely Trump."In preparation, Kishida reached out to Sunao Takao, Shinzo Abe's interpreter with Trump.[78] Takao had been working at Japan's embassy in Tokyo, but was recently moved over to

[75] Alex Willemyns, "US, South Korea and Japan Look to 'Institutionalize' Ties," *Radio Free Asia*, 2018, https://www.rfa.org/english/news/korea/camp-david-summit-08162023134639.html.
[76] Michitaka Kaiya, "Kishida, LDP Warily Eye Possibility of a 2nd Trump Administration," *Yomiuri.co.jp*, January 26, 2024, https://japannews.yomiuri.co.jp/editorial/political-pulse/20240127-164844/.
[77] Michelle Ye Hee Lee, "'If Trump': Japan Readies for the Return of a Quixotic American President," *Washington Post*, April 7, 2024, https://www.washingtonpost.com/world/2024/04/06/japan-donald-trump-moshi-tora/.
[78] Tim Kelly and John Geddie, "Japan Tees up Shinzo Abe's Ex-Interpreter to Help Chart Course with Trump," *Reuters News*, March 26, 2024, https://www.reuters.com/world/japan-tees-up-abes-ex-interpreter-help-chart-course-with-trump-2024-03-26/.

being Director of the Status of U.S. Forces Agreement Division, largely in preparation for the 2024 election.[79]

Even scholars that believed Trump may not be as large of a challenge concede the massive risk that comes with his election. In February 2024, Hal Brands argued that "a Trump restoration wouldn't necessarily be a cataclysm for Tokyo," and that there wouldn't be a perceivable foreign policy shift under a second Trump term.[80] However, Brands concedes two critical points; another Trump presidency would come with much of the same challenges from before, and the main issue that would keep the US and Japan together is rising China tensions. While this is true, it presents a dangerous situation for Japan that would encourage hedging. Any indication of US weakness in policy, or willingness to concede ground to China, would be reason for Japan to start looking for alternative allies to support themselves. Moreover, Trump's rhetoric with China is largely limited to economics; he cares much less about pushing back on security threats. Through that lens, Japanese leaders are almost required to hedge against a US departure, as a favorable trade deal with China could leave Japan vulnerable. That fear is prevalent enough that Japanese leaders, speaking on the condition of anonymity, said they traveled to the US to try and meet Trump to discuss security challenges in East Asia.[81] Brands also recognizes that "if America ever quits the hard work of preserving global order," Japan's current security transformation "will shorten the distance Tokyo must travel to fully look after itself."[82] Moreover, Brands points to three challenges described by members of Japan's foreign policy

[79] Ministry of Foreign Affairs of Japan, "List of Senior Officials," Ministry of Foreign Affairs of Japan, 2024, https://www.mofa.go.jp/about/hq/list2.html.
[80] Hal Brands, "Trump 2.0 Doesn't Have Japan Panicking over China, Russia Threat," Bloomberg.com (Bloomberg, February 28, 2024), https://www.bloomberg.com/opinion/articles/2024-02-28/trump-2-0-doesn-t-have-japan-panicking-over-china-russia-threat.
[81] John Geddie, Tim Kelly , and Yoshifumi Takemoto, "Japan's Message for Donald Trump: Don't Cut a Deal with China," *Reuters News*, February 2, 2024, https://www.reuters.com/world/asia-pacific/japans-message-donald-trump-dont-cut-deal-with-china-2024-02-02/.
[82] Brands, "Trump 2.0 Doesn't Have Japan Panicking"

apparatus, those being managing Trump in general, maintaining coalition-building, and having discipline while dealing with the president.[83] Kishida's actions, and the general comments made by Japanese leaders, indicate that Trump pulling the US away from Japan is a greater fear than an attack from China or Russia is.

After Trump's shock victory, the editors of the East Asia Forum discussed potential changes Japan would have to make, noting that leaders would have to "prepare quietly for the future direction of US foreign policy."[84] A prominent example of these preparations are the Reciprocal Access Agreements. Unlike security treaties, RAAs don't create a binding commitment to act: they operate as a framework for interoperability. A security pact would clearly signal a desire to stave off risks from China or Russia, as it would force a mandatory response; the RAAs, by contrast, serve to deepen cooperation with partners. In that sense, it is less likely that they are responses to a rising threat, but much more likely a focus on developing ties should the US depart Asia.

Take the Australia RAA, signed six weeks before Putin's invasion of Ukraine. With Australia, Tokyo gained a partner with a strong naval background that can respond reasonably quickly to an outbreak of conflict in the South and East China Seas. The cooperation also opens doors to the development of new vessels, given Australia's efforts to modernize its own navy.[85] For example, Australian leaders are aiming to outsource a new general-use frigate, with Mitsubishi's MOGAMI being one of the lead contenders for the project.[86] Mitsubishi's laser

[83] Brands, "Trump 2.0 Doesn't Have Japan Panicking"
[84] EAF Editorial Board, "Repositioning the US–Japan Alliance under Trump," East Asia Forum, September 4, 2017, https://eastasiaforum.org/2017/09/04/repositioning-the-us-japan-alliance-under-trump/.
[85] Brad Lendon, "Australia Unveils Plan for Largest Navy Buildup since World War II," *CNN*, February 20, 2024, https://www.cnn.com/2024/02/20/australia/australia-navy-buildup-intl-hnk-ml/index.html.
[86] Tom Freebairn, "The General Purpose Frigate: An Opportunity for Japan and Australia - Defense Security Monitor," Defense Security Monitor, August 7, 2024, https://dsm.forecastinternational.com/2024/08/07/the-general-purpose-frigate-an-opportunity-for-japan-and-australia/.

project also points to the shift, with Japan turning to countries like Australia and the UK instead of the US to develop security technology.

The United Kingdom RAA and the broader collaboration that Kishida's administration had with them also indicates a preparation for a US departure from Asia. The UK deal brings some similar benefits as the Australia RAA, but it also provides a jumping off point for further technological developments. The clearest example is the F-X fighter program. One major concern for Japan lies in their fighter fleet, which is composed of 155 F-15s, 62 F-2As, and 36 F-35s.[87] All of these aircraft are either directly or largely built by the US; the F-15s and F-35s being McDonnell Douglas and Lockheed Martin designs, respectively, and the F-2As being based on Lockheed Martin's F-16 and substantially produced by the firm as well.[88] A withdrawal by Trump could leave Japan with a strike force that they can't maintain, leaving Japan vulnerable to regional threats. By partnering with the UK on its new fighter, Japan secures a future line that can replace aging jets when the time comes.

The deal signed in the Philippines operates in a slightly different lens from the UK and the Australian RAAs, largely because of the partner. The Philippines generally lacks the defense industry strength of the UK and Australia, long relying on purchasing equipment from other nations for its national security.[89] While that is changing now, thanks in part to a bill passed in January 2024 to push for self-reliance in defense, the Phillipines' defense shifts will be a long term project.[90] Whereas the RAAs with the UK and Australia serve to simultaneously deepen

[87] Flight Global, "2024 World Air Forces," *Flight Global*, November 30, 2023, https://www.flightglobal.com/flight-international/2024-world-air-forces-directory-how-major-conflicts-impacted-global-fleet/156048.article.
[88] Lockheed Martin, "F-2 Support Fighter," Lockheed Martin, 2023, https://www.lockheedmartin.com/en-us/products/f-2.html.
[89] Joe Saballa, "Philippines Pushes for Self-Reliance in Defense," *The Defense Post*, January 25, 2024, https://www.thedefensepost.com/2024/01/25/philippines-self-reliance-defense/.
[90] Saballa, "Philippines Self-Reliance"

exercise cooperation and defense industry production, the primary benefit of the Philippines RAA comes mainly from the proximity between Japan and the Philippines. The Philippines being next door to Japan allows for a direct supporting partner should Japanese vessels have to engage with antagonist forces within the South and East China Seas. The timing of the Philippines RAA also alludes to preparing for a Trump administration, with the signing having occurred on July 8th, 2024.[91] 11 days prior, President Joe Biden and Donald Trump faced off in the first presidential debate, during which Biden looked to be at his weakest and where the calls for him to step down began to rise.[92]

The trio of signed RAAs demonstrate a clear need from Japan to begin covering its bases, especially in the areas that the US could end up leaving. Kishida's National Security Strategy discusses some of the biggest areas that Japan was hoping to continue working with the US on, stating that:

> Particularly, based on constant examinations of the roles, missions, and capabilities of Japan and the U.S., for the purpose of strengthening the Alliance's deterrence and response capabilities, Japan will undertake efforts to coordinate bilateral operations including cross-domain operations and the use of Japan's counterstrike capabilities, improve interoperability, deepen cooperation in the cyber, space and other fields, advance equipment and technological cooperation that capitalizes on advanced technologies, carry out more advanced and practical bilateral exercises, conduct joint Flexible Deterrent Options (FDO), conduct joint intelligence, surveillance and reconnaissance (ISR) operations, and increase joint/shared use of Japanese and U.S. facilities, while further

[91] Ministry of Foreign Affairs of Japan, "Signing of the Japan-Philippines Reciprocal Access Agreement," Ministry of Foreign Affairs of Japan, 2024, https://www.mofa.go.jp/s_sa/sea2/ph/pageite_000001_00432.html.
[92] Elise Hammond et al., "Biden and Trump Face off at CNN Presidential Debate | CNN Politics," CNN, June 27, 2024, https://www.cnn.com/politics/live-news/cnn-debate-trump-biden-06-27-24/index.html.

> developing coordination functions of such framework as the Alliance Coordination Mechanism (ACM). In doing so, Japan will strengthen the foundations of information security and cybersecurity so that Japan and the U.S. can fully employ their capabilities.[93]

Given this explanation, the Reciprocal Access Agreements and the specific nations that Japan chose to sign them with have to be highlighted. The RAAs as a whole will "improve interoperability," help Japan carry out "more advanced" exercises, conduct ISR operations, and boost shared use of facilities alone. That comes alongside the RAAs ability to function as a jumping-off point for the technological cooperation described by Kishida as well, as seen with the F-X fighter and Mitsubishi contracts in Australia.

A fear of Trump's re-election also explains Kishida's shifts in a more cohesive manner than alternatives. The underlying driving force behind the RAAs is inevitably China's actions in the SCS, especially for Australia and the Philippines. When discussions about an Australian RAA first began, China was involved in a range of Maritime disputes that left many wondering whether tensions in the region would erupt into hot warfare.[94] However, while Chinese aggression continued throughout the discussion periods, the most notable expansion by China in the region came after the RAA was signed, in a largely reactionary manner.[95] The same is true for the question of Ukraine, which remains the most common explanation for the catalyst of Kishida's foreign policy change. While it certainly plays a role, with Kishida himself frequently discussing the destabilizing effects of Russia's invasion, it too fails to be an effective explanation given the timing of Kishida's decisions.

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[93] "National Security Strategy of Japan" (2022), https://www.cas.go.jp/jp/siryou/221216anzenhoshou/nss-e.pdf, 22
[94] Council on Foreign Relations, "Timeline: China's Maritime Disputes," Council on Foreign Relations, 2023, https://www.cfr.org/timeline/chinas-maritime-disputes.
[95] Brian Harding and Camilla Pohle-Anderson, "China's Search for a Permanent Military Presence in the Pacific Islands," United States Institute of Peace, July 21, 2022, https://www.usip.org/publications/2022/07/chinas-search-permanent-military-presence-pacific-islands.

Kishida entered office in late September 2021, with news of a finalization of the Australia RAA coming in November that year.[96] By the time Russia invaded Ukraine, Japan's first Reciprocal Access Agreement had been signed. Similarly, the earliest discussions of a UK RAA started as early as 2021, even if it was ultimately signed at the beginning of 2023.[97] The formal agreement to develop fighter sensors, which would ultimately cascade into the F-X project, was signed 10 days before Russia invaded as well.[98] That combination of factors, whether through the timing of announcements or the nature of decisions taken, ultimately point to a perceived need in Japan to prepare for a future where the US would not be present.

Conclusion

Fumio Kishida ultimately faced an uphill climb when it came to Japan's foreign and security policy. He had witnessed the dangers of Donald Trump while serving as Foreign Minister, and now had to grapple with the reality that the United States may genuinely return to a reactionary, isolationist foreign policy that was previously unimaginable. In a world that had already been experiencing security declines, that fear of a US withdrawal serves as the most likely catalyst behind the sudden and significant change in Japanese foreign policy under Kishida.

While Russia's invasion of Ukraine certainly was a destabilizing action, it alone cannot explain the depth and variety of actions undertaken by Kishida. Neither can continued Chinese pressures, as that has historically resulted in a turn towards the US, which was seen under

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[96] Junnosuke Kobara, "Japan Nears Defense Access Deal with Quasi-Ally Australia next Year," *Nikkei Asia*, November 23, 2021, https://asia.nikkei.com/Politics/International-relations/Indo-Pacific/Japan-nears-defense-access-deal-with-quasi-ally-Australia-next-year.

[97] Veerle Nouwens, "Conference Report Japan-UK Defence and Security Cooperation a New Era for the Bilateral Defence and Security Partnership Veerle Nouwens," October 2021, https://static.rusi.org/313_CR_UKJapan.pdf, 5

[98] Takahashi Kosuke, "Japan, UK to Collaborate on Future Fighter Sensor Development," *The Diplomat*, February 18, 2022, https://thediplomat.com/2022/02/japan-uk-to-collaborate-on-future-fighter-sensor-development/.

Kishida. While Kishida's focus on working with non-US partners was of critical importance, he did work extensively with President Biden during his tenure in office to bolster US-Japan ties. In the aftermath of the re-election of Donald Trump, the critical question that remains for Japan will be whether the nation can take the groundwork established by Kishida and turn that into strengths should Trump carry out further destabilizing actions. Ishiba must find a way to navigate the challenge of a new Trump presidency, with the risks now higher than ever before. As the world enters another four years of uncertainty, Japan will find itself in a critical juncture, where the nation will either strike out into a newer, more independent foreign policy, or find a way to maintain a US alliance that will grow more untenable.

Additional Notes

a. Footnote 3 does not follow standard Chicago Style formatting. Instead, it follows the requested citation format listed within the transcript, which can be found at this link: https://www.jica.go.jp/Resource/dsp-chair/english/chair/modernization/ku57pq00002mpdct-att/modernization_chapter_03.pdf

b. The citation for Footnote 41 is listed below; it is copied directly from the footnote within the relevant chapter of the Asia-Pacific Regional Security Assessment 2023, whose citation can be found in Footnotes 39 and 40.

    i. Japan, Ministry of Foreign Affairs, 'Trends in China Coast Guard and Other Vessels in the Waters Surrounding the Senkaku Islands, and Japan's Response', 9 September 2022, https:// www.mofa.go.jp/region/page23e_000021.html. In 2022, Japan's defence budget was US$48.1bn, compared with US$242bn for China. See IISS, The Military Balance 2023 (Abingdon: Routledge for the IISS), pp. 237, 257.

Appendix

Figure 1:

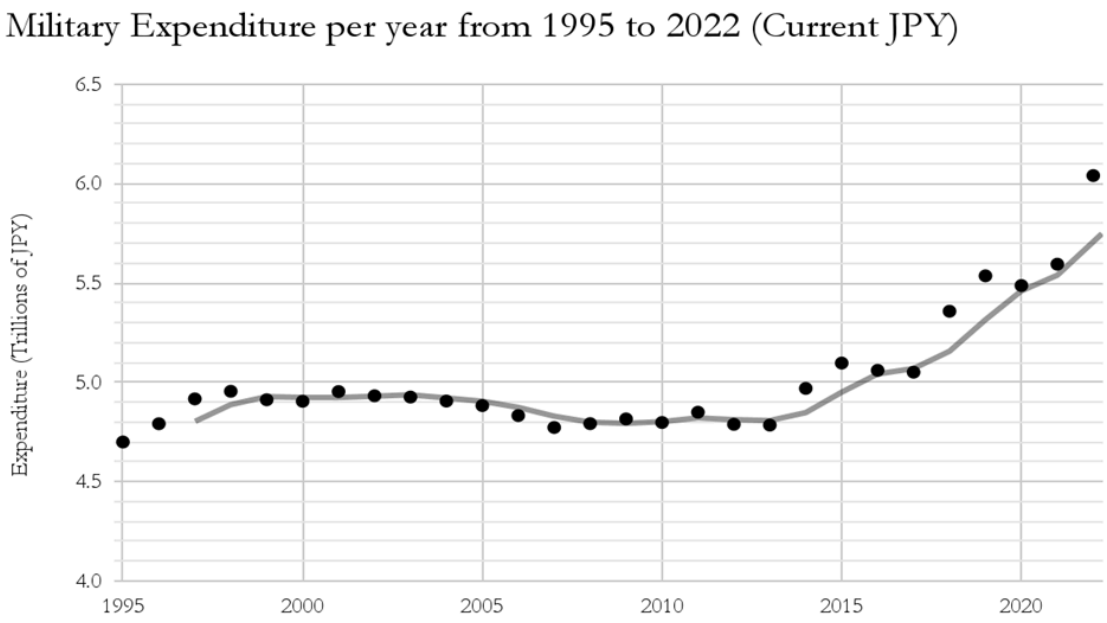
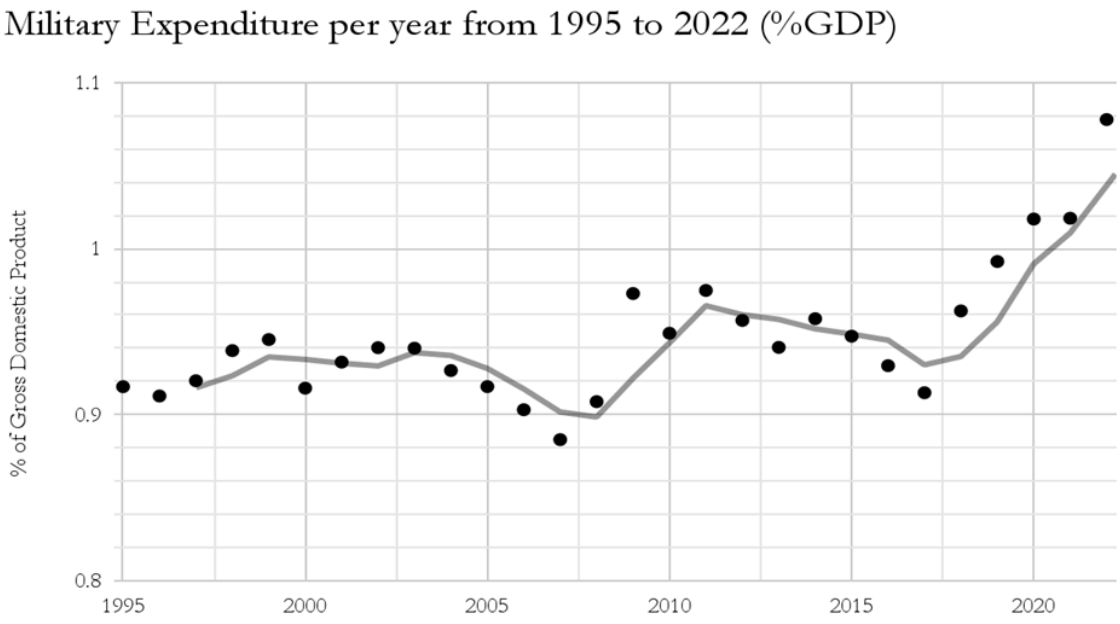


Figure 2:



Both figures use openly available data from the following citation:

The World Bank, "World Development Indicators," The World Bank, 2024, https://databank.worldbank.org/source/world-development-indicators.

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Shifting Memory: The Israeli New Historians and the Transformation of Dominant Conflict-Supporting Narratives of the 1948 Arab-Israeli War

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Abstract

This paper will explore the impacts of the Israeli "New Historians" on popular and official narratives surrounding the 1948 Arab-Israeli War and the refugee crisis that resulted from it. I will perform a detailed analysis of this topic, beginning with the proper historical background and an explanation of the theory behind narratives, why they are so important, what role they play in conflict, and how changing them is important to moving a conflict toward resolution. The traditional dominant Israeli-Jewish narrative contends that the Palestinians all fled voluntarily during the war – the New Historians' research finds that Israeli forces were responsible for the flight of many of the Palestinians, with some degree of endorsement from upper leadership. I will detail how the New Historians changed these narratives, and in doing so sparked a debate that would rage amongst Israeli society for decades after, culminating in changes in both popular and official narratives.

Keywords: Conflict Narratives, New Historians, Israel, Palestine

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Introduction

The Israeli-Palestinian conflict is one of the defining geopolitical events of our time. Spanning over 75 years, it is a protracted and highly escalated conflict encompassing numerous wars. Throughout Israeli and Palestinian history, few events hold similar historical stature as the war and refugee crisis of 1948. These events have been the subject of intense debate and controversy, with both sides claiming victimhood. The conventional Israeli narrative of this watershed moment is as a War of Independence, a "David-and-Goliath" story of the Jewish people prevailing against all odds. The conventional Arab-Palestinian narrative differs significantly, referring to the war as "Al-Nakba", Arabic for "The Catastrophe", due to the mass exodus of Arab Palestinians as a result of war.[1] The 1948 war's legacy has had far-reaching impacts, having significance within the history of Israel, Palestine, and the history of the broader Arab-Israeli conflict, and impacting significant portions of Israeli and Palestinian history up until the present day.

Conflict-supporting narratives are important to study as they play a crucial role in sustaining a conflict over an extended period. They justify a group's participation in the conflict and perpetuate a cycle of hostility by promoting distrust and fueling animosity.[2] They create a "tunnel vision" that makes it difficult to consider the other's perspective or to participate in any

[1] Mordechai Bar-On, "Can the Zionist and Palestinian Narratives of the 1948 War Be Bridged?," in *Israeli and Palestinian Narratives of Conflict: History's Double Helix*, ed. Robert I. Rotberg (Bloomington: Indiana University Press, 2006), 142-173, https://www.jstor.org/stable/41805211?seq=1.

[2] Neta Oren, Rafi Nets‐Zehngut, and Daniel Bar‐Tal, "Construction of the Israeli‐Jewish Conflict‐Supportive Narrative and the Struggle over Its Dominance," *Political Psychology* 36, no. 2 (2015): 215–30, https://doi.org/10.1111/pops.12266.

constructive dialogue.[3] Examining these narratives is crucial to understanding the underlying drivers of a conflict, and changing these narratives is essential to moving toward peace. In a conflict as lengthy and complex as that of Israel-Palestine, volumes could be written about the narratives present in the conflict. In this paper, I will focus on the narratives surrounding the most significant event in the conflict: the 1948 war. After the war, the dominant Israeli-Jewish conflict-supporting narratives remained largely unchallenged until the late 1980s, when Israeli historians Benny Morris, Ilan Pappé, and Avi Shlaim—with Simha Flapan and Tom Segev also contributing—began publishing a series of works that were highly critical of such narratives. This group was collectively known as the "New Historians," as they were all born after 1948 and provided a perspective that contrasted that of the "old" historians who had lived through 1948 and whose points of view were thus constructed in the backdrop of such a major polarizing event.

I will begin by providing a comprehensive overview of the events leading up to the conflict, and the circumstances leading to war following the United Nations' passage of a partition resolution on November 29, 1947. I will continue by exploring the theory behind conflict narratives, the psychological needs they fulfill, and the role narratives play in sustaining a protracted conflict. Next, I will explore the divergent narratives on each side of the war, examining how Israeli and Palestinian historical perspectives have been constructed and what has led to such a significant divergence of stances. I will then detail the context of the New Historians' work, and how each of their publications challenged key aspects of the dominant Israeli-Jewish dominant narrative. Finally, I will explore the impacts of the New Historians, most

[3] Daniel Bar-Tal and Gavriel Salomon, "Israeli–Jewish Narratives of the Israeli–Palestinian Conflict," in *Israeli and Palestinian Narratives of Conflict: History's Double Helix*, ed. Robert I. Rotberg (Bloomington: Indiana University Press, 2006), 34, https://ebookcentral.proquest.com/lib/tau/reader.action?docID=316179&ppg=30.

importantly how they have transformed the official narratives and official memory of the war. Through this exploration, I find that the New Historians' work set off a massive debate culminating in a change in the popular Israeli-Jewish narrative surrounding the war of 1948. Fueled by popular narrative changes and changes in public opinion, the Historians' work also culminated in a change of the official narratives as evidenced through changes included in history textbooks as well as a change in the official position of Israeli negotiators during the Taba Conference in January 2001.[4]

Historical Background of the 1948 War

To fully understand the drivers and implications of the 1948 war, it is first important to understand the circumstances that led to Israel's creation. It was the culmination of both a longstanding, deeply held desire to reestablish a Jewish national home in the Levant – a desire so innate it is included in Jewish daily prayers—and the rise of violent and racialized antisemitism across Europe.[5] These push and pull factors took root in the form of Zionism. Zionism's meaning has changed over time, but at the time the etymology of the word came from the name of Mount Zion, a hill in Jerusalem whose name became synonymous with the holy city and the land surrounding it. To be a Zionist indicated a desire to create a Jewish state in the Jewish people's ancestral homeland. As of 1881, the makeup of Palestine was roughly 450,000 Arabs (approximately 90% Muslim and 10% Christian), and 25,000 Jews—most of whom resided in Jerusalem.[6] Over time, immigration grew, and with it came some friction between the Jewish and

[4] Michal Ben-Joseph Hirsch, "From Taboo to the Negotiable: The Israeli New Historians and the Changing Representation of the Palestinian Refugee Problem," *Perspectives on Politics* 5, no. 2 (2007): 241–58, https://doi.org/10.1017/S1537592707070764.

[5] Benny Morris, *1948: A History of the First Arab-Israeli War* (Yale University Press, 2008), 1. https://doi.org/10.2307/j.ctt1np9bm.

[6] Morris, *1948: A History*, 2.

Arab populations.[7] World War I brought the fall of the Ottoman Empire, which ruled Palestine at the time of its collapse. European powers then sought to take control of the Middle East, and with this came the Balfour Declaration in 1917. In 1922, the League of Nations defined the modern borders of the country, between the Jordan River and the Mediterranean Sea, and placed it under British Mandatory rule. The British, who conquered Palestine during the later stages of the war, became the first major world power to formally declare support for the creation of a Jewish national homeland in Palestine in 1948.[8]

The period following would be characterized by clashes between Jews and Arab Palestinians, driven by growing Jewish immigration and the conflicting desires of Zionists for a Jewish state in the Levant alongside a rise in Arab Palestinian desire for self-determination and self-governance in the wake of centuries of rule by the Ottoman and British empires.[9] Mandatory Palestine experienced several major waves of Jewish immigration, primarily driven by anti-Semitism and the rise of Nazism in Europe, and supported by the British Mandate. Palestine's Jewish population increased from 175,000 in 1931 to 460,000 in 1939.[10] Along with this population shift came several periods of violence in the years 1920, 1921, and 1929, culminating in an Arab revolt from 1936-1939. At this time, Palestinian Arab society was heavily divided, which contributed to the suppression of the revolt.[11]

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[7] Ibid, 2.

[8] Ibid, 34.

[9] Benny Morris, *The Birth of the Palestinian Refugee Problem Revisited* (New York: New York Cambridge Univ. Press, 2004), 9.

[10] Morris, *1948: A History*, 20.

[11] Ibid, 11.

In reaction to this, Great Britain formed a two-pronged response. First, it harshly cracked down on the riots, seeking to prove its strength in the region. Second, it sought to appease the Arabs. In 1936, Britain formed the Peel Commission, a royal entity charged with investigating the root cause of the unrest and recommending solutions.[12] The following year, the Commission released its recommendations,a partition plan including a Jewish state encompassing roughly 20 percent of the Mandate, and an Arab state encompassing the remaining 70+ percent which would be united with Transjordan. Under this proposal, Jerusalem and Bethlehem would remain under British control. Key to this proposal, more controversially, was a population transfer, where the population of the proposed Jewish areas was roughly 40% Arab. In response, the Peel Commission proposed that all or most of the Arab population be relocated into the Arab territory.[13] The Zionist leadership, after deliberation, accepted the proposal. The Arab Higher Committee (AHC), formed in 1936 to represent the Arab Palestinian cause, flatly rejected it, which fueled the ongoing Palestinian revolt. The expansion of Nazism through German conquests in Western and Central Europe led to another significant wave of Jewish immigration to Palestine, despite British attempts to limit immigration after the White Paper of 1939. This policy placed a strict limit on the number of Jewish immigrants from Europe as an attempt to appease the Arabs, leaving millions to die at the hands of Hitler and the Nazis.[14] In total, around six million Jews were killed during the Holocaust from 1933 to 1945, which fueled Zionists' long-standing desire to create a Jewish state free from persecution.

[12] Morris, *Birth*, 11.

[13] Ibid, 46.

[14] Morris, *1948: A History*, 11.

In 1944, the British ministerial cabinet endorsed a plan to partition Palestine and create a Jewish state within it.[15] However, with the British Empire reeling from the impacts of World War II, it ultimately handed the problem to the United Nations. On November 29, 1947, the UN General Assembly passed Resolution 181, officially partitioning Palestine into a Jewish and Arab state with Jerusalem under international control. After deliberation, the Zionist leadership accepted the plan. The Arab states, however, strongly rejected it for various reasons. Transjordan wanted to annex Palestine, which Iraq supported. Syria and Lebanon opposed this plan.[16] Palestine was (and still is) not a UN member-state, and thus did not have a vote on the matter but did send a delegate to speak before the UN General Assembly against the plan.[17] The AHC remained opposed to any sort of partition plan. In the end, the partition plan created a Jewish state, but left a significant Arab-Palestinian population within the boundaries it had drawn for that state. This left a major question as to the political status of Palestinian Arabs living in the Jewish-designated territory, many of whom would become refugees in the subsequent war.[18] This partition plan ignited existing tensions and was immediately met with violence, which soon devolved into a full-scale civil war. The civil war extended until May 14, 1948, when Zionist leader David Ben-Gurion proclaimed the creation of the State of Israel, of which he would later become the first Prime Minister. In the two days following, the conflict expanded to include Jordan, Syria, Egypt, and Iraq—all of which invaded the territory given to Israel under the

[15] Morris, *Birth*, 39.

[16] Avi Shlaim, *Collusion Across the Jordan* (New York: Columbia University Press, 1988).

[17] Jamal Husseini, "Speech before U.N. Before Rejecting Palestine Partition Plan" (U.N. General Assembly, September 29, 1947), https://timesmachine.nytimes.com/timesmachine/1947/09/30/issue.html.

[18] Morris, *Birth*, 60.

partition plan in support of the Palestinians.[19] Thus, the Israeli-Palestinian conflict quickly morphed into the broader Arab-Israeli conflict.

Conflict Narratives

Humans have an inherent need for order and predictability. In a chaotic and harsh environment of a protracted conflict, these needs are violated, leading to the necessity of narratives.[20] Conflict narratives, put broadly, are stories that a group presents about itself. Bruner defines them as "social constructions that coherently interrelate a sequence of historical and current events; [narratives] are accounts of a community's collective experiences, embodied in its belief system and represent the collective's symbolically constructed shared identity."[21] Narratives are socially constructed specifically to fit the current needs of the group, helping to make sense of an often traumatic past, explain why the present state of society is the way that it is, and serve as blueprints for future actions in the conflict.[22] They appear as common sense, serving as an unconscious basis for identities and beliefs as well as a lens through which any new information will pass.[23] In addition, they assign meaning to past events, and by extension, shape political and peacebuilding processes.[24] These narratives serve many functions, all of which justify a society's engagement in the conflict and encourage individuals to make sacrifices on

[19] Morris, *Birth*, 35.

[20] Bar-Tal and Salomon, "Israeli-Jewish Narratives," 19.

[21] Jerome S. Bruner, *Acts of Meaning* (Cambridge [U.A.] Harvard Univ. Press, 1990), 76.

[22] Daniel Bar-Tal, *Intractable Conflicts: Socio-Psychological Foundations and Dynamics* (New York: Cambridge University Press, 2013).

[23] Institute for Integrated Transitions, "The Role of Narrative in Managing Conflict and Supporting Peace," February 2021, https://ifit-transitions.org/wp-content/uploads/2021/02/The-Role-of-Narrative-in-Managing-Conflict-and-Supporting-Peace.pdf.

[24] Bar-Tal and Salomon, "Israeli-Jewish Narratives," 31.

behalf of their society.[25] Especially in intractable conflicts, conflict narratives play a major role in sustaining the conflict over an extended period, such as in the 75 year the Israeli-Palestinian case.

Furthermore, conflict narratives exist on both the individual and collective levels. However, it is important to note that both individual and collective narratives are highly interconnected. Bar-Tal, Nets-Zehngut, and Oren (2014) provide an effective framework for understanding this difference. Both narrative types are socially constructed and created to fit certain psychological needs. On an individual level, narratives can be a coping mechanism for the trauma experienced during protracted conflict, including years of prolonged psychosocial stress.[26] On a collective level, these narratives justify a society's actions in a conflict and diminish feelings of guilt caused by any negative impacts of said actions.[27] This is especially true when it comes to violent acts perpetrated by the in-group society. In this instance, narratives fulfill the role of what Bandura calls "moral disengagement"—creating moral separation from the values that would typically prevent violence.[28] Just as individuals feel threatened during conflict, the collective identity of a society is also threatened. Thus, the conflict narrative reinforces a positive self-image amongst the in-group. It portrays the in-group as virtuous, strong, and united, while portraying the out-group as an amoral aggressor. This distinction is critical to keeping a society's self-esteem sufficiently high to maintain in-group unity while

[25] Oren et al., "Israeli-Jewish Conflict-Supportive Narrative."

[26] Daniel Bar-Tal, Neta Oren, and Rafi Nets-Zehngut, "Sociopsychological Analysis of Conflict-Supporting Narratives," *Journal of Peace Research* 51, no. 5 (2014): 662–675, https://doi.org/10.1177/0022343314533984.

[27] Oren et al., "Israeli-Jewish Conflict-Supportive Narrative."

[28] Albert Bandura, "Moral Disengagement in the Perpetration of Inhumanities," *Personality and Social Psychology Review* 3, no. 3 (1999).

fulfilling the individual need for a sense of belonging.[29] Finally, many societies in conflict rely to varying degrees on outside assistance to sustain their participation in the conflict. Conflict narratives are essential in maintaining this level of support and projecting a positive image abroad.[30]

To provide these functions and fulfill the psychological needs stated above, narratives must meet several key characteristics. To mobilize actors in the conflict, narratives must be very emotionally charged, which is done through several key themes. First, they appeal to emotions such as fear and hatred by detailing how the out-group poses a significant threat to the safety of the in-group.[31] Second, narratives often delegitimize the enemy, portraying them as irremediably malevolent or less than human and thus giving license to violence against them.[32] Third, narratives are deliberately biased, simplistic, and often exclude dissenting information. Societies in conflict actively seek to uphold their narratives due to how crucial they are in sustaining participation in a conflict. All of these characteristics make the narratives difficult to change and thus resistant to peacebuilding efforts. Narratives remind people of the potential recurrence of all past violent and traumatic events, driving individuals to keep fighting the "good fight."[33]

Just as narratives differ on an individual versus collective scale, there is another important distinction to be made. While they both influence each other, popular and official narratives exist separately. An official narrative is one adopted and propagated by official

[29] Bar-Tal and Salomon, "Israeli-Jewish Narratives," 19.

[30] Oren et al., "Israeli-Jewish Conflict-Supportive Narrative."

[31] Ibid.; Bar-Tal et al., "Sociopsychological Analysis."

[32] Ibid.

[33] Bar-Tal and Salomon, "Israeli-Jewish Narratives," 31.

government institutions like the armed forces, national publications centers, and ministries of education. They are spread through official channels such as government publications, statements, and state educational materials like textbooks.[34] The goal of official narratives is to shape popular perception and legitimize state actions. Popular narratives, conversely, are constructed by broader society. They are influenced by official narratives and are composed of the individual beliefs of all people involved in the conflict. Popular and official narratives impact each other, as popular narratives can pressure the government to change, and official narratives can help shape public understanding of a shared past. While both share the common trait of being biased, distorted, and selective in terms of information, official narratives are much more homogeneous.[35] State institutions often seek to portray a united and coherent narrative to more effectively influence the public. In contrast, popular narratives are often much more fragmented, especially in more polarized societies, as the diversity of perspectives and experiences causes counter narratives to arise and dispute the dominant narrative.[36] When individuals go against the popular or official narratives, they are often silenced. For example, in the 1950s and 60s, Ha-olam Ha-zeh, an Israeli weekly news magazine, was publishing information that challenged the dominant conflict-supporting narratives. In response, it was not allowed to be distributed in Israel Defense Forces (IDF) bases and state institutions that were prevented from advertising in the publication.[37] Regardless of type, all narratives play a critical role in sustaining conflict, and

[34] Rafi Nets-Zehngut, "Israeli Memory of the Palestinian Refugee Problem," *Peace Review* 24, no. 2 (2012): 187–94, https://doi.org/10.1080/10402659.2012.677335.

[35] Oren et al., "Israeli-Jewish Conflict-Supportive Narrative."

[36] Daniel Bar-Tal, *Intractable Conflicts: Socio-Psychological Foundations and Dynamics* (New York: Cambridge University Press, 2013), 22.

[37] Oren et al., "Israeli-Jewish Conflict-Supportive Narrative."

also shaping possibilities for peace.[38] Any ecosystem thrives with biodiversity, and narrative landscapes are no different. Conflict narratives are far more than just stories that a society tells about itself - they are powerful social constructs that shape memory and identity, justify violent actions, and sustain conflicts over generations.[39]

Israeli and Palestinian Narratives of 1948

Israeli-Jewish Narratives of the 1948 War - "David-and-Goliath"

The Israeli and Palestinian narratives of the 1948 war focus on several key differences, primarily surrounding the cause of the mass exodus of Palestinians during the war. The conventional Israeli-Zionist narrative describes a "David-and-Goliath" fight, won against overwhelming odds.[40] This narrative was especially prominent in the first few decades of Israel's existence before being challenged by the work of the self-described "New Historians" in the late 1980s. The next section of this paper will focus on the work of the New Historians and their impacts. Presently, I will describe the conventional Israeli-Zionist narrative in its original form, before it became more widely contested. This narrative describes the 1948 war as a war of independence and a struggle for survival against the invading armies of all the neighboring countries in an inherently inhospitable geopolitical climate. This narrative was disseminated through both official and popular means such as the IDF, education system, National Information Center, as well as academia and veterans' memoirs all corroborated each others' narratives.[41]

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[38] Robert I., ed. "Israeli and Palestinian Narratives of Conflict: History's Double Helix." Bloomington: Indiana University Press, 2006. Preface, vii–x

[39] Institute for Integrated Transitions, "The Role of Narrative."
[40] Bar-On, "Can the Zionist and Palestinian Narratives of the 1948 War Be Bridged?," 144.

[41] Rafi Nets-Zehngut, "Internal and External Collective Memories of Conflicts: Israel and the 1948 Palestinian Exodus," *International Journal of Conflict and Violence* 6, no. 1 (2012); Nets-Zehngut, "Israeli Memory."

There are four key narrative components that all combine to form the dominant Israeli-Jewish conflict-supporting narrative. First is the Jewish right to self-determination, which came with a denial of a Palestinian national identity, and thus a right to a Palestinian state. This component sees Palestinians simply as Arabs who happened to reside in the territory, undermining Palestinian land claims and legitimizing Zionist desires to establish a state in the Levant.[42] A second key component is the "David-and-Goliath" concept, a biblical metaphor asserting that Israel was significantly outgunned and outnumbered and yet won the war against five Arab states. This narrative is still very prominent today, and Israeli-Jewish official narratives continue to tout their numerical disadvantage despite newer reports finding that they had a numerical and equipment advantage by the end of the war.[43] The third key component is a denial of blame for the war, including Arab aggression and rejection of peace. As previously mentioned, the Arab states unilaterally rejected the UN partition plan. Upon the formation of the Israeli state, they immediately invaded, as Avi Shlaim puts it, "with the firm intention of strangling the Jewish state at birth."[44] This component strengthens Israel's image as a peace-loving nation forced to defend itself, legitimizing Israel's military actions and absolving them from the responsibility of handling the aftermath. The fourth and most important component regards the origin of the refugee crisis. As the Israeli narrative claims it was fighting a Palestinian people without a nationalist identity tying it to the land and defending itself against a stronger aggressor, the narrative continues to assert that Israel was not responsible for the flight of roughly 700,000 Palestinians. Instead, the narrative claims that the Palestinians fled

[42] Hirsch, "Taboo."

[43] Bar-On, "Can the Zionist and Palestinian Narratives of the 1948 War Be Bridged?," 144.

[44] Avi Shlaim, "The Debate about 1948," *International Journal of Middle East Studies* 27, no. 3 (1995): 287, https://doi.org/10.2307/176252.

voluntarily and were not driven out by Israeli forces. This component roots its assessment in claims that the Arab states encouraged the Palestinians to flee, assuming that after a quick Arab victory, the Palestinians would be able to return to their homes.[45] This claim was propelled by Israeli spokespeople for decades, with minimal evidence to support it.[46] All of these core components became the hegemonic narrative in the decades following the war, as Israel had decisively won and thus wrote much of the history surrounding it.

Until the New Historians' emergence in the late 1980s, the Israeli-Jewish narrative remained largely unchallenged by most Israeli Jews. The dominant narratives of the 1948 War were seen as core aspects of Israeli national identity; to challenge them was to undermine the legitimacy of the state and its right to exist. Israel experienced further conflict throughout its first several decades, in the form of five wars with the neighboring Arab states, and frequent attacks by Palestinian militant groups. This also served to perpetuate these narratives, as Israelis continued to feel existential insecurity as none of the Arab states recognized the country until Egyptian leader Anwar Sadat did so in 1977.

Arab-Palestinian Narratives - "Al-Nakba"

The Arab-Palestinian narrative could not be more diametrically opposed to that of Israel, referring to the event as "Al-Nakba"—"the disaster" or "the catastrophe" in Arabic. One thing to note is that the official Arab-Palestinian narrative is much more fractured due to several reasons. First, Palestinian national identity was not as strong, and Palestine lacked powerful leadership to properly coalesce a unified narrative.[47] Furthermore, since the war involved five Arab states,

[45] Nets-Zehngut, "Collective Memories."

[46] Shlaim, "The Debate," 287.

[47] Saleh Abdel Jawad, "The Arab and Palestinian Narratives of the 1948 War," in *Israeli and Palestinian Narratives of Conflict: History's Double Helix*, ed. Robert I. Rotberg (Bloomington: Indiana University Press, 2006), 75.

each state held its own reasons for joining the conflict. While they all united under the same cause, divisions existed by nationality, as well as by class and sectarian lines within Palestine. Beyond this, during the war, significant parts of Palestine were depopulated, eliminating the cultural and intellectual tradition in the conquered areas. Saleh Abd al-Jawad, a Palestinian historian, writes that in multiple conquered cities "Israeli [forces] destroyed or confiscated all public libraries, printing presses and publishing houses, the land registry, the archives of municipal councils, hospitals, schools, and cultural centers."[48] This severely limited the ability of the Palestinians to write their own history following the war and curtailed the cultural development that would have fueled popular desire to engage with this history.

The Arab-Palestinian narrative contains several components mirroring the claims of the Israeli narrative. First, they assert a longstanding connection to the land prior to 1948, and that a Palestinian national identity had been developing prior to the dawn of Zionism.[49] They recontextualize the war as them defending their homeland against Zionist invaders. The narrative also disputes the Israeli-Zionist claim that the Israelis were fighting against a larger Arab conspiracy. Instead, it asserts that Israel's support by superpowers such as Great Britain and the United States instead enabled Israel's territorial expansion and victory in the war.[50] Even the Soviet Union, seeking to further its security interests by dispelling British influence and military footholds in the region, supported Israel in the conflict. The USSR spoke in favor of Israel at the United Nations and encouraged a critical series of arms shipments from Soviet-influenced Czechoslovakia which helped swing the war in favor of the Israelis.[51] The Arab-Palestinian

[48] Jawad, "Arab and Palestinian Narratives," 90.

[49] Ibid, 73.

[50] Morris, *1948: A History*, 85.

[51] Simha Flapan, *The Birth of Israel* (New York: Pantheon Books, 1987), 169.

narrative further disputes the Israeli claim that the Arab states were united against Israel in favor of the Palestinians, instead alleging that each state was fighting in their own self-interests, which happened to align with the cause of Palestine.[52] Again, the most important part of this narrative comes regarding the refugee crisis. Arab historiography alleges that the goal of Zionists was to create a wholly Jewish state, and part of that was the forceful transfer of Palestinians through systematic ethnic cleansing.[53] Arab-Palestinian historians dispute the claim that Arabs encouraged the Palestinians to flee. Simha Flapan, a scholar adjacent to the New Historians, writes that the AHC "vigorously opposed the departure of Palestinians" and that it circulated a memo to each Arab state participant's head of government urging them not to grant entry permits to Palestinians, with few exceptions.[54] Furthermore, Jawad writes that some of these claims were fabricated by Israeli-run Arabic-language radio channels which were used for psychological warfare against Palestinians.[55]

The New Historians

Context of the Israeli New Historians' Work

The Israeli New Historians are a loosely defined group formed in the late 1980s that broadly challenged the dominant Israeli-Jewish conflict-supporting narrative which had largely remained unchanged since 1948. The term was coined by Benny Morris in a journal article in 1988.[56] He defined his group, which included himself, Ilan Pappé, and Avi Shlaim as the core

[52] Jawad, "Arab and Palestinian Narratives," 75.

[53] Ibid, 73.

[54] Flapan, *Birth of Israel*, 85; Walid Khalidi, "Why Did the Palestinians Leave, Revisited," *Journal of Palestine Studies* XXXIV, no. 2 (2005), 4.

[55] Jawad, "Arab and Palestinian Narratives," 74.

[56] Benny Morris, "The New Historiography: Israel Confronts Its Past," *Tikkun*, 1988; Hirsch, "Taboo."

members with Simha Flapan and Tom Segev as well, in contrast to "old" historians whom he alleges partook in selective historiography, excluding events counter to Israel's dominant narrative. He further contextualizes his group's work as being part of a new generation who were removed from 1948 and thus more impartial relative to the "old" historians who lived through the event and thus held stronger sentiments to the dominant narrative.[57] Morris writes that his group, and his work especially, was more focused on archival research than oral and other forms of history, basing their work on a set of recently declassified military documents, including the war diaries of Israeli founding father David Ben-Gurion.[58] Through their work, the New Historians challenged popular and official narratives regarding the war, taking a revisionist lens to a critical juncture in Israeli history.

This movement would not have happened or received such prominence without the changing dynamics in Israeli society due to the geopolitical backdrop of the time. This shift was partly driven by a new generation of Israelis who began to question conventional Israeli-Zionist narratives more broadly.[59] Furthermore, several events contributed to this shift, beginning with the 1973 Yom Kippur War. The success of initial Egyptian and Syrian surprise attacks, leading to thousands of Israeli casualties, undermined the public's trust in the Labor Zionist political and military leadership that had led the state since its establishment and a shattered sense of invincibility that resulted from Israel's decisive victory and conquest of Arab territory in the 1967 Six-Day War. This put into question the fallibility of the state and the strength of its

[57] Ibid.

[58] Ibid, 6.

[59] Rafi Nets-Zehngut and Daniel Bar-Tal, "Transformation of the Official Memory of Conflict: A Tentative Model and the Israeli Memory of the 1948 Palestinian Exodus," *International Journal of Politics, Culture, and Society* 27, no. 1 (2013): 67–91, https://doi.org/10.1007/s10767-013-9147-6.

narratives.[60] Following this war was a major shift in public perception that aligned with a change in political power from the Mapai/Labor Party, which had ruled since Israel's founding, to the Likud Party. This power shift led to a rift between formal institutions and the Israeli elite, enabling more criticism from the latter.[61] This ideological shift was also depicted in media, as Israeli films Khirbet Khiz'ah (1978) and Mograbi's Deportation (1989) both graphically depicted the violent expulsion of Palestinians.[62] Two more events shook Israeli narratives and opened the gates for more self-criticism. In 1982, Israel invaded Lebanon. The brutal violence in this war, including mass killings in the Sabra and Shatila refugee camps perpetrated by Israeli-allied Lebanese troops, led many Israelis to question the ethos of their state and thus recontextualize the events of 1948.[63] Five years later, the First Intifada erupted, encompassing mass demonstrations, general strikes, and riots by Palestinians living under Israeli occupation in the West Bank, Gaza Strip and East Jerusalem. From this event, Israelis began to see Palestinians as more than passive agents in the conflict and forced them to consider Palestinian narratives, especially regarding 1948.[64] These events collectively fostered a cultural shift that became increasingly open to challenging entrenched and deeply rooted narratives, paving the way for the New Historians to create and disseminate their groundbreaking work.

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[60] Ilan Pappé, "Critique and Agenda: The Post-Zionist Scholars in Israel," *History and Memory* 7, no. 1 (1995): 70, https://www.jstor.org/stable/25618680.

[61] Rafi Nets-Zehngut, *The Israeli and Palestinian Collective Memory: Survey Findings, Analysis, Comparison and Collaboration* (Self-Published, 2022), 33.

[62] Nur Masalha, "New History, Post-Zionism and Neo-Colonialism: A Critique of the Israeli 'New Historians,'" *Holy Land Studies* 10, no. 1 (2011): 5, https://doi.org/10.3366/hls.2011.0002. [Author's Khirbet Khiz'ah was originally a novel published in 1949 before being adapted to film]

[63] Flapan, *Birth of Israel*, 5.

[64] Pappé, "Post-Zionist Scholars," 70.

Furthermore, in its first several decades, Israel generally felt very insecure in its existence, given that war could erupt at any moment, as it did several times. This insecurity led to a more closed-off climate, especially in academia, where many scholars were afraid to publish information contrary to dominant narratives.[65] This came in the form of self-censorship, as scholars did not want to provide any information that could be used as moral and political cannon fodder. It also came in the form of external censorship, as scholars publishing challenging narratives encountered difficulties obtaining funding, getting approval for PhD dissertations, refusal for journal publication, challenges in hiring, and difficulty obtaining source material due to the large amount of classified information.[66] However, in 1979, Israel made a major step towards securing its existence in the 1979 peace agreement with Egypt, stemming from the Camp David Accords a year prior. Following the Camp David Accords, conflict scholar Dr. Rafi Nets-Zehngut's meta-study found a significant increase in the proportion of research containing critical narratives in the period of 1977-1987. This proportion increased further following the New Historians seminal works in 1987-88, with 43 out of the 47 studies reviewed containing critical narratives from 1988-2004.[67]

About the New Historians

The work of the New Historians largely began in 1982, when the Israeli government began declassifying documents en masse regarding 1948 and publishing them to the Israel State Archive (ISA). Unfortunately, Palestine has not preserved many official documents in the war period, and all of the Arab states that invaded are various types of authoritarian regimes that do

[65] Rafi Nets-Zehngut, "Origins of the Palestinian Refugee Problem: Changes in the Historical Memory of Israelis/Jews 1949-2004," *Journal of Peace Research* 48, no. 2 (2011), https://www.jstor.org/stable/29777506.

[66] Ibid.

[67] Ibid.

not wish to divulge information on what was for them a humiliating defeat.[68] The Israeli documents that were published were mostly former IDF Archive and Haganah Archive documents that shed light on what actually happened and what caused the flight of 700,000 Palestinians. Documents were declassified providing a week-by-week account of what occurred in the battles surrounding Haifa, Jaffa, Jerusalem, and other parts of the countryside.[69] The New Historians compiled their analysis into four major works, all published in 1987-1988. The first, Benny Morris' *The Birth of the Palestinian Refugee Problem, 1947-1949* is a critical source for this paper and provides the most extensive history of the period. Morris notably only relies on documents, rather than oral history, to complete his analysis. In this paper, I primarily reference his 2004 revisited edition of the book, as I was unable to obtain the original.

Second, Avi Shlaim's *Collusion Across the Jordan* contends that Jordan's King Abdullah was not as staunchly anti-Zionist as was traditionally thought.[70] He reveals secret meetings between King Abdullah of Transjordan and Zionist leaders, contending that they collaborated to achieve each group's territorial aims, planning to divide Palestine amongst the two powers and in turn leaving the Palestinians without a state, challenging the Zionist narrative that the Arab powers colluded against Israel, when in fact it was the opposite.[71] Third, Ilan Pappé published in 1988 his book on the role of Britain in the conflict, challenging the conventional Zionist narrative that Britain was hostile towards the formation of Israel.[72] In turn, he finds that Britain supported the Israeli-Transjordanian plan to divide Palestine between them, further contrasting

[68] Morris, *Birth*, 3.

[69] Ibid., 5.

[70] Shlaim, *Collusion*.

[71] Ibid., 1.

[72] Ilan Pappé, *Britain and the Arab-Israeli Conflict, 1948-51* (Springer, 1988).

the Israeli victimhood narrative. Finally, shortly after his passing in 1987, Simha Flapan's work was posthumously published, titled *The Birth of Israel: Myths and Realities*.[73] This book debunks several key Zionist myths. Among other things, Flapan alleges that the Israeli war apparatus was not as defensive in nature as the narrative claims, asserting that the Zionist acceptance of the UN partition plan was simply a tactical move enabling them to get more territorial gains after that.[74] Furthermore, Flapan disputes the narrative that Israel was constantly seeking peace in the war, instead claiming that Israel had turned down numerous peace proposals by the Arab states.[75]

Out of these four works, Flapan and Benny Morris focus the most on the refugee crisis. Morris's book debunks several central Israeli myths regarding the 1948 refugee crisis, confirming some aspects of the Palestinian narrative. It did not fully absolve the Arab Palestinians of responsibility for the refugee crisis, finding that many Palestinians did leave voluntarily. It did, however, challenge the dominant Israeli-Zionist narrative that all Palestinians fled voluntarily, placing a fair amount of blame on Israel for the crisis.[76] From the outset of Zionism, the problem arose frequently of the presence of a significant Arab population in what was intended to be a haven for Jews against political and other persecution. This took root in Zionist thought as the concept of "transfer"—what would become a euphemism for expulsion—and was discussed decades before the establishment of modern Israel.[77] Events like the Arab Revolt of 1936-39 compounded with resistance in the 1948 war enhanced Zionist fears

[73] Flapan, *Birth of Israel.*

[74]Ibid., 8.

[75] Ibid., 9.

[76] Morris, *Birth*; Flapan, *Birth of Israel.*

[77] Morris, *Birth*, 49.

that a large Arab population in a Jewish state would pose significant risks to the stability of a Jewish state. Both scholars conclude that there was no overarching plan by the Israeli government to systematically expel Palestinians, but that the government and military allowed and encouraged its progress. In accordance with this, Morris notes the role of Plan Dalet, an order issued in March of 1948 by the Haganah, the Jewish military organization that would evolve into the IDF, to be carried out in the event of an Arab invasion. Plan Dalet, or "Plan D", gave wide discretion to local commanders to clear villages they saw as hostile or a threat.[78] The plan did not explicitly contain a directive to expel Palestinians en masse, but that is what it resulted in.

Reception & Backlash: Short-Term Impact of the New Historians

As the New Historians challenged many facts crucial to the dominant Israeli narrative at the time, their work was disputed by many, in and out of academia. Many of the more established Israeli historians rose up and accused the New Historians of several things, including overall poor scholarship.[79] Shabtai Teveth, most widely known as David Ben-Gurion's biographer, penned a piece in 1989 widely challenging each of the New Historians.[80] In the piece, he makes several broad claims regarding the Historians' methodology, calling their work a "farrago of distortions, omissions,... and outright falsifications."[81] Teveth accuses the New Historians of incomplete research and biased evidence, arguing that they rely too heavily on Israeli, British, and American sources while failing to properly consider Palestinian sources. He contends that

[78] Ibid., 165.

[79] Hirsch, "Taboo."

[80] Shabtai Teveth, "Charging Israel with Original Sin," *Commentary*, September 1988. Accessed April 29, 2025. https://www.proquest.com/docview/195857630/abstract/29690495A8B642CBPQ/1?accountid=11243&sourcetype=Magazines.

[81] Teveth, quoted in Shlaim, "Debate."

this incomplete sourcing leads to a narrative that considers Israeli wrongs in the war much more than Palestinian wrongs, and thus skews their research towards the Palestinian narrative.[82] Teveth further writes that the Historians selectively used evidence to support their claims, citing examples of Benny Morris selectively quoting from Ben-Gurion's diary, exaggerating the role of the Transfer Committee in coordinating expulsion, and Avi Shlaim's misrepresentation of quotes from Nahum Goldmann's autobiography. [83] He believes that the history written grossly overemphasizes Israeli attacks on Arabs while under-considering Arab attacks on Jewish communities. Through this piece, Teveth was the first of several prominent figures to challenge the methods and conclusions of the New Historians, opening the floor for a wide-ranging debate that would last for decades. This debate quickly expanded to occupy the public consciousness, and articles, books, op-eds, and the like were written on both sides of the debate. Tel Aviv University and The Hebrew University both hosted conferences on the subject, receiving much public attention.[84] The debate further expanded into the public sphere as both the Historians and their detractors went on TV and radio to promote their respective viewpoints. News media extensively covered the subject, as Israelis sought to grapple with the implications of the New Historians' findings.

The criticism of the New Historians' work from within Israel was divided into three main categories. The first was professional critiques, like those stated above. Efraim Karsh, a prominent critic of the Historians, described them as "neither new nor true historians." This line of thinking, that the New Historians' work was not in fact new, is acknowledged by Avi Shlaim,

[82] Teveth, "Original Sin."

[83] Ibid.

[84] Hirsch, "Taboo."

who notes that many of the Historians' central ideas "were advanced long ago by Israeli writers, not to mention Palestinian, Arab, and Western writers."[85] However, Shlaim notes that the significantly increased access to critical documents sets their analysis apart from that of others. Karsh goes further to say that their ideas, while they may reference new material, are essentially repackaged ideas with a 'new' label to brand the Historians as trailblazers and inventors. While Karsh describes this label as "pretentious," he acknowledges that it helps them draw attention to their work and rise further into the Israeli political consciousness. The label of 'new' helped the Historians distinguish themselves as a separate ideological movement, forcing academia and the public to engage with 'new' truths in contrast to long-held beliefs which they in turn branded as 'old' and outdated.

The second type of critique was a purely emotional response, as challenging deeply felt ideas elicited a strong reaction from many sectors of the country. Author Aharon Megged even accused the Historians of having a "suicidal impulse," further contending that they were aiding Israel's enemies and endangering the status of the Jewish state.[86] The third category of critique was politically motivated, saying that the Historians' work was inherently biased and designed to undermine Zionism itself. In his book, Efraim Karsh further asserts that their political leanings impeded any ability to produce true and impartial findings.[87] However, history and its interpretation is rarely impartial. The historians were weighing in on a highly political subject, upon which any such history would be tainted, somehow, by the political leanings of those who wrote it.

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[85] Shlaim, "The Debate," 289.

[86] Hirsch, "Taboo."

[87] Efraim Karsh, *Fabricating Israeli History: The "New Historians"* (London: Frank Cass, 2000), xxxvii, 195.

Echoing Avi Shlaim's commentary on the originality of their work, many Arab authors further criticized the New Historians. Nur Masalha, a prominent Palestinian historian born in 1957, accuses them of supplanting and ignoring Palestinian viewpoints and contributions, portraying their work as purely Israeli. Masalha writes that "the 'new history' may have even contributed to reinforcing Israeli and pro-Israeli domination of discourses" regarding Palestine and the 1948 war.[88] In a 1991 piece criticizing the Historians, Masalha also calls into question the neutrality of the Historians. Contrary to detractors saying they were too pro-Palestinian, Masalha counters with claims that the Historians still framed their work within Zionist discourse, failing to include Palestinian sources within their dialogue.[89] It is important to include counter-narratives in research challenging dominant narratives; however, Nets-Zehngut notes the relative of in-group criticism of a dominant conflict narrative, as most Israelis would be much less receptive to work done by a Palestinian than to criticism from Israelis themselves.[90]

As previously discussed, dominant narratives are so difficult to challenge because they are deeply held beliefs essential to one's identity. Furthermore, narratives surrounding the 1948 war are crucial to the founding of Israel and justify Israel's actions in the conflict as well as its existence as a whole. To critics of the New Historians, challenging these narratives meant threatening Israel's moral standing and historical legitimacy. Doing so strikes right to the heart of what it means to be Zionist, and what it means to be Israeli. The New Historians brought to prominence many uncomfortable truths, and in doing so, provoked a very strong reaction from all parties involved in the conflict. While the information was very unflattering to Israel, it

[88] Masalha, "Critique."

[89] Nur Masalha, "A Critique of Benny Morris," Source: *Journal of Palestine Studies* 21, no. 1 (1991): 90–97, https://www.jstor.org/stable/2537367.

[90] Nets-Zehngut, "Origins."

presented a much more nuanced view of the conflict, a critical process to transforming "biased, selective, distorting, and simplistic" conflict-supporting narratives into more balanced peace-supporting narratives.[91] By taking these risks to challenge such narratives, the New Historians were instrumental in beginning a decades-long process to bring nuance to the dominant Israeli narratives, and thus nudge a protracted conflict further towards peace.

Impact of the New Historians

Changes in Popular Narratives

While the backlash to the New Historians was immediate, their work has had a lasting impact. The Historians broke a longstanding taboo in Israeli politics regarding Israel's share of responsibility for the 1948 war and refugee crisis, bringing the topic into public debate which would continue for years to come. Over the subsequent twenty or so years, we begin to see the New Historians' impact in many sectors of Israeli society. From 1994 to 2000, Israeli daily newspaper Haaretz published 42 op-eds, articles, and book reviews on the New Historians' findings, also publishing two to four comments from readers on average on each of these articles.[92] Israeli Members of the Knesset (MKs) held roundtables with the New Historians' representatives as well as their critics. This disseminated the New Historians' findings across the country and created a critical debate that was too taboo to be debated before the Historians' work. The lasting impact of these historians, however, took decades to fully incorporate itself into popular and official narratives.

Regarding changes in popular narratives, Rafi Nets-Zehngut and Daniel Bar-Tal conducted a representative public opinion survey in 2008 assessing the Israeli collective memory

[91] Masalha, "Critique."

[92] Hirsch, "Taboo."

across 23 separate topics relating to the conflict, a few of which relate to the 1948 war.[93] This was the first time that such a survey had been conducted. Question 8 explicitly addresses the refugee issue: "What were the reasons behind the departure of Palestinian refugees during the War of Independence?"[94] To this, 40.8% of respondents answered that the refugees left of their own volition, and 39.2% of the respondents answered that the refugees left partially due to fear and calls from leaders to leave, and partially due to expulsion by Jewish forces. This indicates a significant shift in the popular narrative relative to before the Historians performed their work.

Changes in Official Narratives

In 1998, the TV documentary series *Tekuma* was released, promoting critical narratives and also consulting Benny Morris in its creation.[95] *Tekuma,* meaning "revival" in Hebrew, was notable as it was produced by the Israeli National Broadcasting Authority, indicating some level of tacit acknowledgment by the Israeli government of the New Historians' findings. The series features a much more complex portrayal of 1948 relative to pre-New Historians documentaries like *Amud Ha-Esh* (Pillar of Fire), released in 1981, which portrayed the Palestinian exodus as purely driven by Arab propaganda. *Tekuma*, in contrast, displayed a much more nuanced picture, depicting instances of Israeli forces deliberately expelling Palestinians with authorization from Israeli leadership.[96] Furthermore, *Tekuma* was the first time that an Israeli public broadcasting agency had used the term "Al-Nakba" to describe the events of 1948.

[93] Nets-Zehngut, *Survey Findings*, 14.

[94] Ibid., 42.

[95] Hirsch, "Taboo."

[96] Ibid.

The New Historians' impact on official narratives was divided based on what part of the government the narrative came from. The Israeli Publications Agency (IPA) has consistently presented the Zionist narrative at least until 2004, attributing the flight of Palestinians solely to voluntary exit or instructions from Arab leaders.[97] Because the IPA is managed tightly by the Israeli government, it is under significant pressure to project a positive national image, protect Israel's international reputation, and maintain control over narratives regarding 1948. A review of the IPA's publication protocols by Dr. Rafi Nets-Zehngut revealed that the IPA employed a variety of tactics like ignoring evidence of expulsions, euphemizing, and highlighting Jewish efforts to convince Palestinians to stay.[98] The Israel Defense Forces (IDF) was similarly resistant to adopt critical narratives, as it was hesitant to include any information that would negatively impact troop morale and devotion to the Israeli cause.[99]

The most significant shift in official narratives comes within textbooks approved by the Israeli Ministry of Education. Another study by Dr. Nets-Zehngut reviewed all 19 textbooks approved by the Ministry that deal with the 1948 war and Palestinian exodus.[100] This study revealed that, from 1959 to 2004, these textbooks slowly came to embrace the critical narrative, acknowledging the role of Israeli forces in the expulsion of Palestinians. Before 1975, all approved textbooks displayed exclusively the Zionist narrative, aligning with the national educational approach of cultivating patriotism and strengthening students' connection to Israel

[97] Rafi Nets-Zehngut, "Israel's Publications Agency and the 1948 Palestinian Refugees," *Israel Studies* 21, no. 1 (2015).

[98] Ibid.

[99] Rafi Nets-Zehngut, "The Israeli Army's Official Memory of the 1948 Palestinian Exodus, 1949–2004," *War in History* 22, no. 2 (2015), https://doi.org/10.1177/0968344514522999.

[100] Rafi Nets-Zehngut, "Israeli Approved Textbooks and the 1948 Palestinian Exodus," *Israel Studies* 18, no. 3 (2013), http://www.jstor.org/stable/10.2979/israelstudies.18.3.41%20.

through a Zionist lens. From 1975 to 1999, a gradual shift began, as some Israeli textbooks acknowledged that some Palestinians were expelled in 1948, but provided a limited acknowledgement of the Israeli popular narrative. The third period, 2000-2004, brought the most significant change. After the New Historians' work had time to gain significance and acceptance, textbooks approved in this period fully embraced the critical narrative, fully acknowledging that Israeli forces' expulsion of Palestinians was a key factor in the exodus of 1948.[101]

Finally, the critical narratives propelled by the New Historians reached a height it never had before during the Taba Conference in January 2001 between Israel and the Palestinian Authority. During the final round of negotiations, negotiators discussed the number of refugees that would be allowed to return to Israel, the first time in history such a thing had happened.[102] Furthermore, the negotiators acknowledged that Israel did bear some responsibility for the birth of the refugee crisis, marking a significant shift from all previous negotiating positions. The Palestinian negotiators specifically brought up the work of the New Historians, forcing the Israeli side to consider counter-narratives brought up. While Hirsch notes that there is no direct evidence that that the negotiators read the Historians' work, she writes: "it is clear that the negotiators read the theses of the New Historians, and that they were very attentive to the public debate the New Historians provoked and to change in the representation of the refugee problem in Israel."[103] This change was the result of a years-long shift in "bottom-up" changes in public opinion initiated by the New Historians. In response, the "top-down" change in official

[101] Ibid.

[102] Hirsch, "Taboo."

[103] Ibid.

negotiating position happened. This change, albeit symbolic, indicated a new willingness to work with the Palestinians on critical issues like that of 1948.[104]

Conclusion

Cambridge Dictionary defines a narrative as "a story or a description of a series of events."[105] In a conflict setting, narratives are much more than this. Through a biased interpretation of reality, they fuel animosity and distrust, emotionally mobilizing individuals to support the conflict and oppose any attempts at constructive dialogue. Specifically in an intractable conflict like that of Israel and Palestine, narratives become deeply embedded in a society's culture and institutions, making resolution difficult.[106] Changing these narratives is essential to any peace-building effort, as it breaks this cycle of hostility and opens minds to a new way forward that is not defined by conflict. To change dominant narratives, they must be made more nuanced, which is what the New Historians did. Through careful analysis, they dissected many aspects of the dominant Israeli-Jewish narrative, opening up a wide-ranging debate that would continue on for many years after.

The New Historians made notable impacts on the narratives surrounding the 1948 war, a central issue in the conflict. By challenging the dominant narrative, they made steps toward bridging the two narratives and pushing the conflict further toward a resolution. Through their analysis of recently declassified documents, the New Historians contended that Israeli forces were in fact partially responsible for the expulsion of Palestinians during the 1948 war. They

[104] Nets-Zehngut and Bar-Tal, "Transformation of the Official Memory of Conflict," 67-91.

[105] Cambridge Dictionary, "Narrative | Meaning in the Cambridge English Dictionary," Cambridge.org, 2019, https://dictionary.cambridge.org/dictionary/english/narrative.

[106] Bar-Tal et al., "Sociopsychological Analysis."

forced the Israeli public to confront their long-held beliefs about the founding of the state, leading to a more honest and critical discussion about the topic. This discussion, which was wide-ranging and engulfed Israeli academia, and to a slightly lesser extent, Israeli society, broke longstanding taboos about acknowledgement of responsibility for the war and refugee crisis.[107] While the New Historians may not have been entirely original in their arguments, their status within Israeli society made them able to challenge these narratives from a legitimacy that would be impossible for any external actor. Their impacts can be seen throughout several key sources. First, the public debate the New Historians sparked led to changes in the Israeli-Jewish popular narrative, as around 40% of Israelis acknowledged in 2008 that their country was at least partially responsible for the flight of Palestinians.[108] Furthermore, it led to changes in the official narratives as seen in history textbooks from 2000-2004.[109] Unfortunately, the data on popular and official narratives is only available through 2004. To properly assess the long-term impacts of the New Historians, more research is needed to analyze these impacts up until the present day.

[107] Hirsch, "Taboo."

[108] Nets-Zehngut and Bar-Tal, *Survey Findings*, 42.

[109] Nets-Zehngut, "Israeli Approved Textbooks."

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From Tolerance to Turmoil: Secularism and its Impacts on Religious Extremism in the Middle East

Julian Alin❀

Abstract

This study seeks to understand the implementation and subsequent effects of secularism in the Middle East, and its potential impacts on the rise of religious extremism and violence in recent decades. In defining secularism as a sociopolitical phenomenon aimed at keeping religion outside of the public or political sphere, this study is centered around a historical examination of the policy decisions and social agendas put forth by Arab governments—representing varying styles of governance and political philosophies—and putting forth the impacts and consequences of these decisions on the rise of religious extremism. Focusing on case studies from Egypt and Syria, two of the most prominent examples of the battle between government authority and religion in politics, this study analyzes: 1) the policies and legislation of the past few decades aimed at suppressing or removing religion from public life; and 2) the relationship between Islamist groups and secular governments, highlighting the secularist developments that may have contributed to the process of radicalization. This study aims to contribute to academic discourse by suggesting that secularism, as a model of modern governance, in the distinct form it has taken in the Middle East, has impacted and even contributed to the rise of religious extremism in the region.

Keywords: Secularism, Religious Extremism, Security State, Political Islam, Radicalization

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Introduction

The United States and the geopolitical West have long prided themselves over the establishment and preservation of the post-World War II liberal order. A key pillar of the stability of these liberal democracies, according to the rule of law upholding them, is the separation of religious and government activity: a sociopolitical phenomenon known as secularism. Thus, secularism has been thought to be an essential feature of modern sustainable governance, although among Western societies it has not taken a single ubiquitous form. Generally speaking, the modern umbrella of secularism entails the basic tenets of the separation of religious and political authorities, the free practice of religion of one's choice, and the diminished influence of religion in political life.[1] The specific implementations of political secularism, however, have taken on different forms from country to country. These different models of secularism have arisen due to the varying cultural and historical developments in each country. In the United States, the First Amendment to the Constitution stands as the foundational document representing American secularism:

> Congress shall make no law respecting an establishment of religion, or prohibiting the free exercise thereof…[2]

The derivation of American secularism from the First Amendment can be described as promoting the tolerance of religion, in which the absence of an established religion has promoted the coexistence of and respect for different religious groups.[3] This model of tolerance has been

[1] George Kateb, "Locke and the Political Origins of Secularism," Social Research 76, no. 4 (2009): 1002, http://www.jstor.org/stable/40972199.

[2] U.S. Constitution, amend. 1.

[3] Tom Rosentiel, "Religion and Secularism: The American Experience," Pew Research Center, December 3, 2007, https://www.pewresearch.org/2007/12/03/religion-and-secularism-the-american-experience/.

shaped by numerous Supreme Court cases concerning religious freedom, as well as the cultural emergence of the "separation of church and state" as an inherent value of American government and society.[4] This general principle of tolerance does not represent the challenges faced in terms of the practical application and upholding of religious tolerance in the United States, but rather a model of secularism serving as an analytical category.

Another prominent model of Western secularism is displayed in France, where religion in public life has become an issue of controversy in recent years. Like the United States, France has a constitutional foundation for its status as a secular republic, though it traces its legacy of secularism further back to the French Revolution and its magnum opus, the Déclaration des Droits de l'Homme et du Citoyen.[5] These foundations formed a centralized model of French secularism known as *laïcité*, which embodies a rejection of religion, more intense than American tolerance, ensuring the complete absence of religion in public life.[6] This more definitive rejection of religion has caused modern political discourse in France to address the controversial banning of wearing religious garments and symbols in public spaces—whether a Muslim hijab, Jewish kippah, Christian cross, or otherwise—although such assertive secular legislation is criticized as embodying French Islamophobia in the face of higher rates of immigration from the Islamic world.[7] The foundational legislation for these controversial bans stems from a 1905 law aimed at limiting the authority of the Catholic Church:

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[4] Rosentiel, "Religion and Secularism".

[5] Jean Baubérot, "The Secular Principle," (conference paper presented at 'Veil 2000', University of North Carolina, March 14, 2006), https://franceintheus.org/IMG/html/secularism.html.

[6] Ibid.

[7] Jeremy Rodell, "What do Secularists Mean by 'Secularism'?" LSE Religion and Global Society, January 9, 2019, http://blogs.lse.ac.uk/religionglobalsociety/2019/01/what-do-secularists-mean-by-secularism/;Stephanie Höppner, "France: Abaya Ban Triggers Secular Laws Debate," Deutsche Welle, August 30, 2023, https://p.dw.com/p/4VjRu.

> It is forbidden, in the future, to erect or to put up any religious sign or symbol on public buildings or in any public place…[8]

Thus, the forceful nature of *laïcité*, based on the principle of the rejection of religion, presents another analytical category to view secularist structures and policies. In the United States, religion can be expressed in the public sphere, present but separate from politics, not infringing on the rights of others; in France, religion must be left at home altogether. These two models of secularism exemplify two different forms of maintaining political and religious separation in Western society, with differing degrees of religious expression in public life.

It is important to note that the forms secularism has taken in the United States and France are not the only models of secular governance, even among Western democracies. The United Kingdom continues to appoint its monarch as the head of the Church of England, and yet official guidance on the teaching of British values in the education system promotes the "mutual respect and tolerance of those with different faiths and beliefs."[9] However, the American and French models of secularism, which O'Brien describes as models of "strict separation" of religion and state, compared to more hybridized systems in other European governments,[10] are the more relevant analytical categories regarding secularism in the Arab world, due to the political influence and cultural reach of France and the United States—primarily their foreign policies, impacting state-building and postcolonial governance—in the Middle East in recent decades.

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[8] "Loi Concernant la Séparation des Églises et de l'État," art. 28, signed December 9, 1905, *author's translation*, https://www.legifrance.gouv.fr/loda/article_lc/LEGIARTI000006340360.

[9] Rodell, "What do Secularists Mean"; Department for Education and Lord Nash, "Guidance on Promoting British Values in Schools Published," GOV.UK, November 27, 2014, https://www.gov.uk/government/news/guidance-on-promoting-british-values-in-schools-published.

[10] Peter O'Brien, "Secularism," in The Muslim Question in Europe: Political Controversies and Public Philosophies (Philadelphia: Temple University Press, 2016), 144, http://www.jstor.org/stable/j.ctt1kft8dx.8.

It is also important to consider that secularism as a political phenomenon developed more gradually out of Western Christendom over the course of the centuries following the Protestant Reformation and the European Enlightenment,[11] as opposed to the more recent imposition of secularism in the aspiration of rapid modernization in the Middle East during the Arab Renaissance (النهضة). For this reason, the cultural and political shock of building secularist structures, in any of their organizational forms, impacted a civilization that had not experienced an indigenous development of secularism comparable to its extent in Europe. This led to the establishment, development, and eventual radicalization of political religious groups—in the Arab context, primarily pertaining to the majority religion of Islam. The cases of Egypt and Syria represent two of the most prominent battlegrounds between secular governments and Islamist groups, where secularism has become part of the national paradigm, and the fight against religious extremism has become a pillar of holding onto power.[12]

In analyzing these prominent examples of secular governance in the Arab world, a distinctly Middle Eastern model of secularism, different from the American and French models, arises—one aimed at controlling religion as a powerful cohesive social force and making it subordinate to state institutions—shaping state-religion relations, often times aggressively and adversely, through the syncretic influences of the many presidents and political agendas over time.

[11] Gil Anidjar, "Secularism," Critical Inquiry 33, no. 1 (2006): 59–60, https://www.jstor.org/stable/10.1086/509746.

[12] Samuli Schielke, "Secular Powers and Heretic Undercurrents in a God-Fearing Part of the World," (conference paper presented at 'Secularity and Nonreligion Research Network', King's College, July 5, 2018), 1, https://allegralaboratory.net/wp-content/uploads/2018/11/KEYNOTE_Schielke-2018.pdf.

Case Study I: Arab Republic of Egypt

To examine how secularism has been promulgated through government policies and actions in the Middle East, we first turn to the region's most prominent example of the varying roles of religion in public life: Egypt, an ethnically homogeneous nation with a dominant 90% Sunni Muslim population.[13]

On October 6, 1981, on the anniversary of his launching of the 1973 October War against Israel, President Anwar al-Sadat was assassinated by a member of the Islamic Jihad, an extreme offshoot of Egypt's primary Islamist movement, the Muslim Brotherhood.[14] Sadat's rule, from 1970 to 1981, had completely transformed Egyptian society and reoriented its political and economic systems—signifying how the 1970s was the pivotal decade for political Islam in the Middle East. Sadat was renowned for Egypt's Cold War transformation from a Soviet-aligned socialist economy to a steadfast ally of the capitalist West through his landmark policy of infitah (انفتاح) that promoted market liberalization and industry privatization.[15] Such major shocks to the existing order required the deployment of a cohesive social force to prevent social unrest: Islam.[16] Sadat did not wish to be a secular leader like his socialist predecessor, Gamal Abdel Nasser, instead choosing the image of a pious leader and even being called the "believer president"— going so far as to reference shari'a as a source of legislative legitimacy in Egypt's

[13] U.S. Department of State, 2023 Report on International Religious Freedom: Egypt (Washington, DC: U.S. Department of State, 2024), https://www.state.gov/reports/2023-report-on-international-religious-freedom/egypt/.

[14] Bruce Riedel, "What Anwar Sadat's murder 40 years ago meant for the Middle East," The Brookings Institution, October 1, 2021, https://www.brookings.edu/articles/what-anwar-sadats-murder-40-years-ago-meant-for-the-middle-east/.

[15] Cengiz Günay, "Egypt: The Marriage of Islamism and The System," Global Political Trends Center (GPoT), no. 32 (2012), http://www.jstor.org/stable/resrep07714.

[16] Günay, "Egypt: Marriage of Islamism," 1-2.

new 1971 constitution.[17] Thus, a key question is presented regarding the manifestation of religious extremism in Egypt in the 1970s: How did the leader with the most favorable policies towards political Islam (and in turn the lowest degree of secularism) result in being assassinated by the precise groups he had allowed a rapprochement with?

In using the 1970s as the historical fulcrum to explain this inconsistency, the preceding context (1920s to 1960s) illustrates the underlying conditions that can also be applied to the political developments of the future (2010s). Looking back to the foundation of the Muslim Brotherhood in 1928, Hasan al-Banna, a schoolteacher and imam disillusioned by Egyptian leadership's insistence on secular modernization, formed the grassroots organization with the goals of community building and social reform along Islamic lines.[18] The Brotherhood's formation occurred in the midst of Egypt's "liberal experiment"—a time following the nation's newfound independence in 1922, characterized by nationalistic unity and the hopes of a growing middle class, paired with lingering colonial chokeholds over economic and security policy. [19] Following the collapse of the last Islamic Caliphate in the form of the Ottoman Empire, Islamic thought was divided between traditionalists who rejected modernization and the followers of Muhammad Abduh, a 19th-century founding scholar of the Arab Renaissance, who recognized the value of reforming Islam to play a new role in a changing world.[20] Although al-Banna looked to Abduh as an intellectual model, the initial formation of the Brotherhood was more a response

[17] Samer Shehata, "Egypt: The New Founders," The Wilson Center, August 27, 2015, https://www.wilsoncenter.org/article/egypt-the-new-founders.

[18] Abd al-Monein Said Aly and Manfred W. Wenner, "Modern Islamic Reform Movements: The Muslim Brotherhood in Contemporary Egypt," Middle East Journal 36, no. 3 (1982): 337, http://www.jstor.org/stable/4326425.

[19] Selma Botman, "The Liberal Age, 1923-1952," in The Cambridge History of Egypt Vol. 2, ed. M. W. Daly (Cambridge: Cambridge University Press, 1998), 297.

[20] Said Aly and Wenner, "Reform Movements," 338-39.

to counter the failure of liberal institutions under British oppression than an effort to reorient Islamic thought.[21] In this sense, the early Muslim Brotherhood developed with the primary goals of ridding Egypt of its foreign occupation and defending Islam—having little to do with shaping Islamic thought or its intellectual development, which the movement would later take on.[22] Instead, a series of political decisions and cultural shifts throughout the following decades transformed the movement, leading to a rise in extremism that culminated in the 1981 assassination of Sadat.

A period of profound changes in 20th-century Egyptian government and society took place during the era of Gamal Abdel Nasser, following the 1952 Free Officers coup that overthrew the monarchy and founded the Republic of Egypt. Though he rose to power and prominence with a degree of assistance from the Muslim Brotherhood, such as when members burned downtown Cairo in 1952 as a show of anti-British and anti-monarchy protest, Nasser had a certain vision of a state that differed significantly from the goals of any Islamist sociopolitical group.[23] He had no interest in forming an Islamic state, or even a state where Islam served as a key pillar of government rule, as he set in motion processes of modernization and secularization:

> Nasser was not satisfied with merely creating new institutions parallel with the traditional ones; his aim was to modernize the bases of legitimacy using Western and nationalist concepts, in addition to modernizing the panoply of other traditional institutions.[24]

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[21] Ibid; Botman, "The Liberal Age," 297.

[22] Botman, "The Liberal Age," 297.

[23] Said Aly and Wenner, "Reform Movements," 341-42.

[24] Ibid, 342.

Nasser instead envisioned a state where religion played practically no role in public life or in politics. Thus, the short-lived political involvement of the Muslim Brotherhood in the early 1950s ended with Nasser's violent suppression and mass incarceration of its members—an intense crackdown following a propaganda war and assassination attempt in 1954—which served as a lasting punishment until Sadat took power in the early 1970s.[25] However, unlike Mustafa Kemal Ataturk in 1920s Turkey, who sought to fully reject religion as a cultural phenomenon, Nasser still recognized Islam's importance in society for his own legitimacy.[26]

As a sociopolitical architect, Nasser's state-building was centered around two parallel projects: the idea of "Arab Socialism" as an economic solution for the woes of the Egyptian people, and "Arab Modernism" as a sociocultural undertaking, where Egypt could become part of the modern world without compromising its identity and culture.[27] These two major projects (and the political means to achieve them), combined with Nasser's cult of personality as the leader of the Arab world and the primary advocate of Pan-Arabism, served as key components of Nasserism (الناصرية).

In the pursuit of Arab Modernism, Nasser's government did not undertake formal processes of secularization (i.e. through legislation), nor did his regime consider itself secular; rather, secularism was a result of the cultural marginalization of religion throughout the process of creating a modern society. In Arab Socialism, just as other Soviet-aligned governments promoted a Marxist rejection of religion in public life, Nasser sought to establish a clear

[25] Shehata, "Egypt: New Founders".

[26] Ibid,Said Aly and Wenner, "Reform Movements," 343-44.

[27] Relli Shechter, "Old Society, New Society," in The Egyptian Social Contract: A History of State-Middle Class Relations (Edinburgh: Edinburgh University Press, 2023), 124-25.

hierarchy with religion being subservient to the state.[28] This was best demonstrated by the nationalization of Al-Azhar, one of the leading theological institutions of the Sunni Muslim World.[29] By seeking to control its functions while reforming its curriculum, the Nasser regime essentially eroded Al-Azhar's legitimacy and credibility.[30] This new curriculum consisted of the addition of secular subjects, such as medicine and engineering, aimed at changing the values of the traditional institution.[31] This focus on education was a prominent component of Nasser's modernist reforms, and Nasser believed that a secular form of education would propel Egyptian society to compete on the global stage.[32] This tension between secular reforms and the demotion of religious institutions resulted in the political and cultural repression of religion in public life. In conclusion, with the socialist state wanting to maintain a presence in all aspects of daily life, it would have been put in competition with Islam, a social force already present in all aspects of daily life, requiring the government to subdue religion as subordinate to the state.

The most significant Nasserist government action against religion in Egypt, however, was the suppression of Islamic groups seeking political participation and social relevance. In taking steps to push religion to the margins of society, Nasser could not allow Islamist groups with widespread sociopolitical networks to mobilize the community against the state. He took aggressive measures to keep his new political adversaries out of the public sphere: as previously mentioned, following the 1954 assassination attempt, thousands of members of the Muslim

[28] Said Aly and Wenner, "Reform Movements," 342-43.

[29] Barbara Zollner, "Prison Talk: The Muslim Brotherhood's Internal Struggle during Gamal Abdel Nasser's Persecution, 1954 to 1971," International Journal of Middle East Studies 39, no. 3 (2007): 412, 424, http://www.jstor.org/stable/30069528.

[30] Said Aly and Wenner, "Reform Movements," 343.

[31] Ibid.

[32] Shechter, "Old Society, New Society," 127-29.

Brotherhood were imprisoned without trial, later to be tortured or kept in poor conditions, and several of the group's leaders were executed.[33] Another wave of mass incarceration took place in 1965 and 1966, following allegations of plotting against the state.[34]

This intense period of suppression had the greatest impact on the development of political Islam—transforming the Muslim Brotherhood (and in turn the various radical offshoots that branched off from it) from a grassroots political organization into a model of militant Islamism and source of modern jihad, which would advocate for the use of physical power to abolish un-Islamic authorities.[35] In this period of mass incarceration and political persecution, religious thought and the role of Islam in political activism became more extreme, slowly developing in the cells of Egypt's prisons, induced by the harsh conditions imposed by the Nasser regime. Thus, after such a long period of repression, when President Anwar al-Sadat chose to pursue policies of amnesty and subsequently released large numbers of political prisoners and the incarcerated members of the Muslim Brotherhood, Egypt experienced an explosion of political Islam in the 1970s—but now with a more radical set of ideals.[36]

Though Nasser undertook the mass incarceration of Muslim Brothers simply out of perceived political necessity, the intense suppression of Islamic associations was tantamount to a form of political secularization. As previously stated, Nasser did not view secularism as a focus of his political vision; it was simply a byproduct of his pursuit of Arab Modernism. Therefore, in viewing the Muslim Brotherhood and related groups as detrimental to societal development,

[33] Zollner, "Prison Talk," 412-13.

[34] Said Aly and Wenner, "Reform Movements," 342.

[35] John Calvert, "Sayyid Qutb and the Power of Political Myth: Insights from Sorel," Historical Reflections / Réflexions Historiques 30, no. 3 (2004): 525–26, http://www.jstor.org/stable/41299321.

[36] Shehata, "Egypt: New Founders".

Nasser saw Islam as a thing of the past and aimed to crack down on those whose vision of a state differed too greatly from his own. The aspiration of modernism bred the need for the absence of religion in public life, and thus the pressure of secularist repression spurred the radicalization of an entire movement.

The most notable case of religious extremism emerging out of this dark age for the Brotherhood was Sayyid Qutb, a Brotherhood member who became the ideological pillar for contemporary Islamism.[37] As a political prisoner of Nasserism, Qutb wrote a fundamental work, Ma'alim fi al-Tariq (معالم في الطريق, Eng: Milestones), that influenced incarcerated Brothers all over Egypt, claiming that the greatest enemy of Islam was the very regime that had strayed from the Qur'an, charging the existing political order with apostasy, and coming to the conclusion that violence was the most effective way to bring about change.[38] The spread of Qutbism that began in the 1960s completely changed the ideologies of political Islam, from the various Islamist groups in Egypt to Al-Qaeda in the 1990s and 2000s.[39] Qutb's influential reach is exemplified in Al-Faridah Al-Gha'iba (الفريضة الغائبة, Eng: The Neglected Duty), by Muhammad Abd al-Salam Faraj, the leading ideologue of Islamic Jihad—the group responsible for Sadat's assassination:

> Fighting the near enemy is more important than fighting the distant enemy. In jihad the blood of the Muslims must flow until victory is achieved. But the question now arises: is this victory for the benefit of an existing Islamic state, or is it for the benefit of the existing infidel regime? [40]

[37] Calvert, "Sayyid Qutb," 509-10.

[38] Said Aly and Wenner, "Reform Movements," 345.; Zollner, "Prison Talk," 419, 425.

[39] Shehata, "Egypt: New Founders".

[40] Bernard Lewis, "Secularism in the Middle East," Revue de Métaphysique et de Morale 100, no. 2 (1995): 162, http://www.jstor.org/stable/40903409.

The impact of Qutb's Islamist manifesto endured long past Qutb's execution and Nasser's death just a few years later. By the time President Anwar al-Sadat released a multitude of Nasser's political prisoners and sought peaceful coexistence with Islamist groups, the imprint of years of secularist repression had already taken hold.[41] However, with an agenda resembling Nikita Khrushchev's policies of de-Stalinization, which sought to walk back the oppressive legacy of the preceding Soviet regime, Sadat's government was intent on overturning the Nasserist order and realigning Egypt with the West and the global capitalist order.[42] Through Sadat's landmark policy of economic infitah, with free enterprise came newfound protections of political freedoms, which were previously sacrificed under the social contract of "Arab Socialism" in exchange for economic security provided by the state.[43] Thus, following the release of Islamist leaders, the Muslim Brotherhood was finally able to participate in political discourse, most notably in the drafting of the Egyptian Constitution of 1971.[44] With the Nasser regime having largely lost its legitimacy in the late 1960s, Sadat aimed to draw on Islam as a cohesive social force to provide consolidation of his authority, best exemplified by Article 2 of the 1971 Constitution:

> Islam is the religion of the state and Arabic its official language. Islamic law (shari'a) is the principal source of legislation.[45]

Several other articles of the 1971 Constitution further display Sadat's emphasis on embracing Islam and bringing political Islam back into the fold, including articles dealing with family life

[41] Shehata, "Egypt: New Founders".

[42] Roger Owen, Rise and Fall of Arab Presidents for Life (Cambridge: Harvard University Press, 2012), 65-66.

[43] Shechter, "Old Society, New Society," 137-39.

[44] Said Aly and Wenner, "Reform Movements," 349-50.

[45] Arab Republic of Egypt, The Constitution of the Arab Republic of Egypt, 1971, English translation (New York: Oceana, 2007), art. 2, https://constitutionnet.org/sites/default/files/Egypt%20Constitution.pdf.

(Article 9), national morality (Article 12), and religious education (Article 19).[46] However, one key element of the document runs counter to this anti-secular shift: Article 5's prohibition of political activity and political parties established on a religious basis or on religious referential authority.[47] Therefore, the Muslim Brotherhood was not allowed to function as a formal political entity, nor participate in national elections, although its network expanded and grew in popularity, especially among Islamic associations and university campuses.[48]

While his policies of liberalization opened up the political realm to political Islam, Sadat simultaneously aimed to consolidate executive authority into a kind of presidential security state—a powerful presidency able to unilaterally exercise power using the state's security apparatus (the armed forces and intelligence services).[49] Under the previous closed socialist system, Nasser was able to essentially regulate Islam through the absence of religion in public life and direct control over religious institutions such as Al-Azhar. In an open capitalist society, however, Sadat still sought to maintain authority over Islam, trying to make Islam a pillar of his regime and his cult of personality, but this turned out to be extremely difficult due to the concurrent decentralization of religious sovereignty—essentially a "privatization" of Islam.[50] This privatization allowed for extreme Islamism and notably Qutbism to promulgate throughout Egyptian society, producing vocal opposition in the late 1970s when Sadat's policies, reflective

[46] Arab Republic of Egypt, Constitution, arts. 9, 12, 19.

[47] Arab Republic of Egypt, Constitution, art. 5.

[48] Said Aly and Wenner, "Reform Movements," 356-58.

[49] Owen, Arab Presidents for Life, 65-67.

[50] Shehata, "Egypt: New Founders".

of the presidential security state he was building, ran counter to the new ideals of political Islam.[51]

Although the period of coexistence between Sadat and the Muslim Brotherhood remained balanced for much of the decade—thanks to the aforementioned constitutional collaboration, as well as Brotherhood efforts to maximize political benefits with a pro-Islamic leader—Sadat's major policy changes alienated political Islam and eventually led to the assassination of the president.[52] As previously discussed, the prohibition of establishing Islamic political parties according to Article 5 of the 1971 Constitution was one of these major decisions. Two other points of contention came from consequences of infitah, both economic and political: 1) the growth of unprincipled activities, such as alcohol consumption and gambling, resulting from Western investment and tourism; and 2) the granting of several political rights to women, now considered an influential electoral constituency.[53] Finally, the most significant political decision that served as a lethal wedge between Sadat and Islamists was the normalization of relations with Israel through the Camp David Accords in 1978 and the subsequent Egyptian-Israeli Peace Treaty in 1979.[54]

These four decisions, while forming key elements of Sadat's political architecture, forged a secularist paradigm in which shari'a and commonly-held Islamic beliefs were disregarded. Islam, while used symbolically by the president, arguably held no real position in politics, being just as absent in public life as under Nasser. This unintended political secularism, promoted by

[51] Ibid.

[52] Said Aly and Wenner, "Reform Movements," 354-56.

[53] Ibid.

[54] Ibid.

Sadat's watershed economic policies and security strategies, paired with the spread of Qutbism and the prominent display of Islamism in the 1979 Iranian Revolution, culminated in the assassination of Anwar al-Sadat, the "believer president", in 1981.

In the following years under the leadership of Sadat's Vice President, Hosni Mubarak, the presidential security state further consolidated its executive authority as the Egyptian government waged a civil war against jihadist groups—political Islam as a whole experienced the consequences.[55] The military, which had long been a key tool of both Nasser and Sadat, was even more essential to President Mubarak as he cracked down on dissent, and Egyptian security services, to this day, are the dominant force in society.[56] President Mubarak did not implement any major policy changes from the Sadat regime, following through on Egyptian-Israeli normalization and a capitalist orientation through the end of the 20th century.[57] The process of political liberalization, however, was under threat. The Muslim Brotherhood renounced violence as the state went after Islamic Jihad and other extremist groups, though a wave of terrorism in the 1990s saw Nasser-era levels of repression carried out indiscriminately.[58] Throughout this period, the Muslim Brotherhood strived for political representation and a pluralist system, although Mubarak allowed little room for participation.[59]

Following the Arab Spring uprisings that saw the end of the Mubarak regime through civil disobedience, the Muslim Brotherhood formed the Freedom and Justice Party to formally

[55] Owen, Arab Presidents for Life, 67-68.

[56] Ibid, 67-68.

[57] Riedel, "Anwar Sadat's Murder".

[58] Shehata, "Egypt: New Founders".

[59] Ibid.

represent the organization in the new democratic order.[60] In Egypt's first democratic presidential election in 2012, the Freedom and Justice Party and its leader, Mohamed Morsi, were brought to power, demonstrating the popularity and payoff of the Islamist social investments made in the midst of Mubarak's restrictive political climate.[61] For many Egyptians, both Nasser's socialism and Sadat's capitalism had failed to bring economic security, leading many to turn to Islam as a potential solution to the country's woes.[62] Morsi became the first Islamist head of state in the Middle East, distancing himself from Egypt's *ancien régime* and aligning himself with the values of the Egyptian Revolution, although some fundamental aspects of the old order could not be shaken.[63] The Egyptian Armed Forces, specifically the Supreme Council of the Armed Forces (SCAF), governed as a military junta during the transition period between Mubarak and Morsi, imposing de facto martial law.[64] The lasting military legacy of the Presidential Security State was exemplified by Morsi's 2012 constitutional declaration that granted him expanded powers with limited judicial oversight.[65] Any semblance of democratic reform was replaced by fierce opposition and criticism, culminating in mid-2013 with protests and demonstrations even larger in number than the 2011 Revolution.[66] Morsi's newly-appointed Minister of Defense, Abdel

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[60] Ibid.

[61] Sarah El Deeb and Lee Keath, "Islamist Claims Victory in Egypt President Vote," Associated Press, June 18, 2012, https://www.cbsnews.com/news/islamist-claims-victory-in-egypt-president-vote/.

[62] Quatre Femmes d'Égypte, directed by Tahani Rached (1997; Montreal, Canada; National Film Board of Canada), VHS.

[63] El Deeb and Keath, "Islamist Claims Victory".

[64]Ibid.

[65] Shehata, "Egypt: New Founders".

[66] Ibid.

Fattah el-Sisi, gave Morsi an ultimatum to step down, thus ending the Muslim Brotherhood's brief attempt at governance after just over a year.[67]

Morsi's Islamist reforms, such as enshrining shari'a law as a source of legislation in the constitution once again, were undone following Sisi's 2013 coup. In Nasserist fashion, Sisi cracked down on the Muslim Brotherhood in an aggressive campaign that saw the mass incarceration of thousands and the killing of hundreds of supporters.[68] Once again, religion had no place in Egyptian public life. The intense repression and banning of the Islamist movement lasts until today, with Sisi's domestic and foreign policy being guided by the pursuit of destroying the Muslim Brotherhood and similar Islamist organizations.[69] Although he aims to wield Islam as a social cohesive force, similar to Sadat's "believer-president" personality, Sisi is far from tolerant of political Islam. Furthermore, he has recently restricted educational curricula from including verses of the Qur'an and other Islamic texts in textbooks—calling back to Nasser's secular form of education—in the name of "fighting extremism".[70] He has restricted the autonomy of Al-Azhar's leadership, consolidating the presidency's power over the Grand Mufti of Egypt, just like Nasser's initial nationalization of the institution.[71] The suppression of Islamist groups, the shaping of education, and state control through nationalization are among the tools of the Egyptian secular structure in order to maintain what has been a long and contentious battle

[67] Ibid.

[68] Mahmoud Jaraba, "Why Did the Egyptian Muslim Brotherhood Year-Long Rule Fall?" Zeitschrift Für Politik 61, no. 1 (2014): 61, http://www.jstor.org/stable/24229171.

[69] Steven A. Cook, "Egypt's Nightmare: Sisi's Dangerous War on Terror," Foreign Affairs 95, no. 6 (2016): 110–20, http://www.jstor.org/stable/43948387.

[70] MEE Correspondent, "Egypt's Sisi faces backlash against removal of the Quran from school textbooks," Middle East Eye, February 23, 2021, https://www.middleeasteye.net/news/egypt-sisi-quran-removed-school-textbooks-backlash.

[71] Sam Hamad, "Sisi the so-called secularist sets his sights on Al-Azhar," The New Arab, July 30, 2020, https://www.newarab.com/opinion/sisi-so-called-secularist-sets-his-sights-al-azhar.

with political Islam. The continuity from Nasser to Sisi, even with supposed reversals of policy under Sadat and Morsi, has been strong and generally unwavering, demonstrating how decades of secularism as a foundation of Egyptian society has influenced and impacted the rise of religious extremism in the Middle East.

Case Study II: Syrian Arab Republic

While Egypt has served as a cradle of prominent Sunni Islamist scholarship, from which several forms of religious extremism have emerged, another Arab state has experienced the impacts and consequences of secularism throughout the past few decades, and much more deeply and more recently with the conditions of its civil war: Syria, a far more diverse nation, both ethnically and religiously.

In the 1960s, a Middle Eastern cold war began to emerge between what Gamal Abdel Nasser referred to as the "progressive states" and the "reactionary states" of the region.[72] Among the cohort of progressive states, in addition to Nasser's Egypt, was Syria. The largest nation of the Levant, whose modern form was born out of the 1916 Sykes-Picot Agreement and the subsequent League of Nations mandate, was famously an epicenter of the Arab Renaissance (النهضة, Nahda) and a hub of the period's secular (non-Islamic) intelligentsia.[73] The religious context of Syria differs greatly from other Middle Eastern states due to its diverse demographics: its religious diversity is rivaled only by its neighbor Lebanon—leading many to conflate religious sectarianism with the conflicts experienced in both countries. The prewar breakdown of Syria's various ethnic and religious communities was as follows: 61% Arab Sunni, 14% Kurdish

[72] Nasser's Republic: The Making of Modern Egypt, directed by Michal Goldman (2016; Brooklyn, NY: Icarus Films Home Video), DVD.

[73] Anwar G. Chejne, "Intellectual Revival in the Arab World: An Introduction," Islamic Studies 2, no. 4 (1963): 418–19, http://www.jstor.org/stable/20832710.

Sunni, 12% Alawite, 10% Christian, 4% Druze, and 1% Yazidi.[74] Thus, the coexistence and participation of each of these religious communities in public life has long been a central component of Syrian society. The role of religious minorities in politics has especially been consequential in Syria, since the founding of the ruling Ba'ath Party and throughout the decades-long reign of the al-Assad family. Although sectarianism has served as a centrifugal force in Syria, particularly since the outbreak of civil war, the Ba'ath Party and the Assad regime have long promulgated policies of secularism, influencing the rise of religious extremism in the late 20th century, and especially following the Arab Spring in the 2010s.

The driving force that forged the modern Syrian state and consolidated the authority of its ruling dynasty was Ba'athism, an indigenous ideology emerging in the 1940s that sought the "resurrection" (in Arabic: ba'ath) of the Arab Levant, demonstrated by intense nationalism and anti-imperialist sentiment.[75] Not entirely different from Nasserism, Ba'athism sought effective state-building through a combination of nationalism and socialism: a form of Arab Socialism that prioritized the liberation of the Arab world from both tyranny and poverty.[76] The movement's founders, Michel Aflaq and Salah al-Bitar—an Orthodox Christian and a Sunni Muslim, respectively, both educated at the Sorbonne in Paris—believed that because the Arab nation had been divided by imperial powers, a resurrection or regeneration of Arab civilization could only be achieved through political unity and through individual efforts to regain a secular "Arab consciousness":

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[74] M. Zuhdi Jasser, "Sectarian Conflict in Syria," PRISM 4 (2014): 61, http://www.jstor.org/stable/26469777.

[75] John Galvani, "Syria and the Baath Party," MERIP Reports, no. 25 (1974): 5, https://www.jstor.org/stable/3011567.

[76] Robert Olson, "The Ba'th in Syria 1947–1979: An Interpretative Historical Essay (Part One)," Oriente Moderno 58, no. 12 (1978): 649, http://www.jstor.org/stable/25816643.

> That individual regeneration is not a religious process, but a moral one. To be Arab, to regain a consciousness of being Arab, does not mean being Muslim or religious at all. Islam was one of the greatest creations of the Arab nation, but is not the soul of that nation. Arabism is.[77]

Due to both a close association with Marxist thought and the inclusion of all religious groups in a call for nationalism, Ba'athism has held secularism as a foundational basis to effectively promote its vision for a resurrected society since its conception.[78] A decade before Nasser became the leading advocate of Pan-Arabism, Aflaq and Bitar served as the loudest voices of Arab socialism, aspiring for a reorganized economic system that would redistribute wealth and remove the chokehold of aristocracy—promoting an economic system that, like other Marxist experiments, did not require the presence of religion in public life.[79]

Syria's entanglement with Nasserism eventually came in the form of the United Arab Republic, a union with Egypt intended to strengthen both of the region's two leading progressive states. Instead, the short-lived union realized a de facto annexation of Syria by Nasser, with ill-suited economic policies exploiting Syria's industrial base and little to no Syrian representation in Nasser's government.[80] Once received in Damascus as a hero in 1958, Nasser was expulsed as a mere colonizer by 1961, serving as the death of Pan-Arabist aspirations.[81] A power vacuum followed, presenting an opportunity for the Ba'athists to take power at the

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[77] Galvani, "Syria and Baath Party," 5.

[78] Ibid.

[79] Olson, "Ba'th in Syria (One)," 649.

[80] Nasser's Republic, directed by Goldman.

[81] Ibid.

national level with a coup in 1963 and a resurgence of Syrian nationalism previously suppressed by the Egyptians.[82] Under the United Arab Republic, Syrian nationalist officers were removed from power, instead turning to the Ba'athist Party to form a military wing that vied for power until its 1963 victory.[83] Among the leaders of the military wing was an Alawite officer by the name of Hafez al-Assad.

By the 1960s, the Ba'athist Party had attracted much of Syria's religious minority populations, particularly the Alawite and Druze communities, which had both led secessionist movements decades prior.[84] Conversely, Ba'athism had largely alienated much of the Sunni majority because of its inherent secularism, which many urban Sunnis saw as a manifestation of Marxist atheism—the emphasis on Arab identity superseding Muslim identity further fueled Sunni skepticism of the movement.[85] Interestingly, however, Michel Aflaq was also influenced in part by his Christianity in addition to his Marxist beliefs, as evidenced by his use of biblical diction in Ba'athist ideology: resurrection, salvation, sacrifice, etc.[86] This further attracted Christians and Alawites to the movement, becoming associated with the resistance of the Sunni majority's will in the public domain.[87] The large role played by Syria's religious minorities to resist the imposition of Sunni-led agendas formed the basis for the over-representation of these

[82] Galvani, "Syria and Baath Party," 6.

[83] Ibid.

[84] Olson, "Ba'th in Syria (One)," 674-681.

[85] Galvani, "Syria and Baath Party," 5.

[86] Olson, "Ba'th in Syria (One)," 647.

[87] Raymond A. Hinnebusch, "Syria Under the Ba'th: State Formation in a Fragmented Society," Arab Studies Quarterly 4, no. 3 (1982): 179, http://www.jstor.org/stable/41857625.

groups, particularly the Alawites, in the following decades, marginalizing the Sunni majority.[88] This political marginalization would manifest itself with the expansion of political Islam emanating from Egypt in the 1970s. Thus, the groundwork was laid for more extreme religious pushback under Hafez al-Assad and later his son Bashar, producing sectarianism through secularism.

In 1970, Syria briefly intervened in the Jordanian Civil War (Black September) by supporting the Palestine Liberation Organization against the Jordanian monarchy—an intervention opposed by then-Minister of Defense Hafez al-Assad.[89] The ruling Ba'athists subsequently sought to remove Hafez al-Assad from his position for his opposition, to which Assad responded by taking power in a bloodless coup in 1970, overcoming the many clashing subfactions of the Ba'athist movement in a period of great instability.[90] Under the previous administration, the military factions of the Ba'athist Party gained greater influence and authority in the upper levels of government, a trend that was accelerated under Hafez al-Assad's leadership once he took control of the presidency.[91] The civil-military relations established by Assad would come to define his regime and the Syrian state as a whole, with the military serving as a major tool for the promotion of the president's policies—among which the facilitation of secularism at the national level and the suppression of religious groups were prominent. In what the military Ba'athists called the "Corrective Movement", Hafez al-Assad's minority-heavy consolidation of authority further alienated the Sunni urban elite, who turned to the Muslim Brotherhood in

[88] Ibid; Robert W. Olson, "The Ba'th in Syria 1947-1979: An Interpretative Historical Essay (Part Two)," Oriente Moderno 59, no. 6 (1979): 449, http://www.jstor.org/stable/25816680.

[89] Olson, "Ba'th in Syria (Two)," 460.

[90] Galvani, "Syria and Baath Party," 9-10.

[91] Ibid,10.

Syria.[92] With the aspirations of establishing an Islamic state, the group organized demonstrations and riots in the late 1970s, culminating in an armed rebellion that began in 1980.[93] The Syrian Brothers opposed themselves to the secular Ba'ath doctrine and process of secularization undertaken by the regime, carrying out major attacks killing dozens in the years leading up to the insurgency.[94]

Hafez al-Assad, however, made several attempts to appease the Sunni majority and the Muslim Brotherhood, (not unlike Egypt's Sadat) by presenting an image of being a devout Muslim.[95] The 1973 Syrian Constitution, unlike Egypt in 1971, did not initially enshrine Islam as the official state religion, omitting any mention of a national faith, prompting the Brotherhood to call for a jihad against his "atheist and corrupt regime" and Assad himself, the supposed "enemy of God."[96] At the time, Assad hoped to gain the trust of the Sunni majority, as well as that of the Muslim Brothers, leading him to take conciliatory actions—which would contrast from his future crackdowns.[97] Such extreme criticism led to a revision of the legislation with the inclusion of the constitution's Article 3:[98]

(1) The religion of the President of the Republic has to be Islam.

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[92] Laila Rifai, "The Sunni Religious Landscape Before 2011," in The Sunni Religious Establishment of Damascus: When Unification Creates Division, Carnegie Endowment for International Peace (2020): 3, http://www.jstor.org/stable/resrep24914.4.

[93] Ibid.

[94] Yvette Talhamy, "The Syrian Muslim Brothers and the Syrian-Iranian Relationship," Middle East Journal 63, no. 4 (2009): 567–68, http://www.jstor.org/stable/20622954.

[95] Talhamy, "Syrian Muslim Brothers," 566.

[96] Ibid.

[97] Ibid.

[98] Olson, "Ba'th in Syria (Two)," 463.

(2) Islamic jurisprudence is a main source of legislation.[99]

Hafez al-Assad went on to publicly pray in mosques on Fridays and to have prominent religious figures declare him a devout Muslim, although the Muslim Brotherhood still viewed Assad and his Alawite sect as kafir (كافر) or heretical, exacerbating the conflict between the group and the government.[100] In 1979, the Muslim Brotherhood killed 83 military recruits in Aleppo—all Alawite—transforming the group from political opposition to terrorist actor.[101] The Assad regime, like Nasser, responded with a major crackdown on Islamists in the form of incarceration and execution.[102] The conflict spiraled into a national insurgency, pitting the Islamists against the secularists and resulting in thousands of casualties. Following the assassination of Sadat, Islamists threatened the same for Assad.[103] The climax of the Brotherhood's insurgency came in 1982 in the city of Hama, when Assad sent military forces to fight the rebel uprising that resulted in the destruction of much of the city and tens of thousands of lives lost.[104] The battle marked the defeat of the uprising and the regime's 1980s campaign to dismantle the insurgency and send the Muslim Brotherhood underground for good.[105]

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[99] Syrian Arab Republic, Constitution, 1973, English translation (New York: UNHCR, 1973), art. 3, https://www.refworld.org/legal/legislation/natlegbod/1973/en/38517.

[100] Talhamy, "Syrian Muslim Brothers," 566-67; Maximilian Lakitsch, "The Sectarian Dimension of Political Legitimacy in Syria: The National Roots of Sectarian Violence in the Syrian War," Sicherheit Und Frieden (S+F) / Security and Peace 35, no. 2 (2017): 94, http://www.jstor.org/stable/26428672.

[101] Talhamy, "Syrian Muslim Brothers," 567.

[102] Ibid.

[103]Ibid.

[104] Dara Conduit, "The Syrian Muslim Brotherhood and the Spectacle of Hama," Middle East Journal 70, no. 2 (2016): 211–12, http://www.jstor.org/stable/26427399.

[105] Rifai, "Sunni Religious Landscape," 3.

Regardless of his attempted appeasement of the Sunni majority to serve as a Muslim head of state, and despite the aforementioned constitutional revision, Hafez al-Assad continued to promulgate the Ba'athist doctrine of secularism through the exercise of his centralized authority. The suppression of Islamist groups was an evident tool for keeping religion out of public life, although the regime's direct control over religious institutions, similar to Egypt's nationalization of Al-Azhar, was also important in establishing a secular order in Syria. The mechanisms of this direct state control were exerted in three primary domains: 1) the ownership and financing of religious institutions; 2) the appointment of religious leaders; and 3) the curricula of religious schools.[106] Hafez al-Assad used his Ministry of Religious Endowments as a tool to build his legitimacy, owning a vast portion of Syria's large mosques and influencing local religious groups that relied on government support for the appointment of their imams.[107] The approval of mosque employees by the Prime Minister or by the local security services remains a power held by the regime today—demonstrating how the legacy of direct state control has established a hierarchy between state and religion, forcibly keeping the religious sphere dependent on, yet outside of, the political sphere.[108]

With the turn of the century, Bashar al-Assad became the first hereditary ruler in the postcolonial Middle East as President of Syria. He was keen on distancing himself from his father's cult of personality by promising political and economic reforms—a kind of Syrian infitah to reorient the country around a liberal market economy, and with it a more open

[106] Kheder Khaddour, "State Control and Localism Prior to the Syrian Uprising," in Localism, War, and the Fragmentation of Sunni Islam in Syria, Carnegie Endowment for International Peace (2019): 3, http://www.jstor.org/stable/resrep20968.5.

[107] Ibid, 3-4.

[108] Ibid, 4.

representative government. The regime loosened its restrictions and direct control over religious institutions, allowing for increased participation in social and economic life.[109]

The newfound decentralization of authority over the religious realm, however, did not last. Syria faced major external pressures: the United States invasion of Iraq in 2003, the Cedar Revolution in Lebanon in 2005, and the international consequences of being labeled as part of President George W. Bush's "Axis of Evil".[110] Therefore, although Bashar al-Assad had initially relaxed the regime's policies towards Islamist groups out of fear of his regime's insecurity, such policies subsequently underwent dramatic transformation due to their unintended consequences:

> The United States' invasion of Iraq in 2003 marked a turning point in terms of state control over Syria's religious institutions. At first, the threat that Washington might seek to pursue regime change in Syria led the authorities to be more tolerant of Salafi-jihadi combatants crossing into Iraq to fight U.S. forces. However, this approach had a boomerang effect. Some of the militants gradually returned to Syria, especially following the spike in sectarian killings in Iraq in 2007. At that stage the regime began cracking down on newly radicalized preachers and instituted stricter supervision over religious education.[111]

Suppression, education, and direct state control reemerged as the tools of Syria's secular apparatus to subdue the influence of religion in public life, certainly influenced by Ba'athist ideology, though increasingly due to political necessity. This trend was further stimulated by a Damascus terrorist attack in September 2008, for which Fatah al-Islam, a Lebanon-based group,

[109] Ibid, 7-8.

[110] Rifai, "Sunni Religious Landscape," 4.

[111] Khaddour, "State Control and Localism," 4.

took responsibility, while also citing inspiration from extremist students at a prominent Islamic institute in Damascus.[112] The government took several corrective actions in response to the attack, leading the new Minister of Religious Endowments to bring Islamic institutes accused of fomenting jihadi ideology under state authority, essentially "partially nationalizing" them.[113] At the same time, the Ministry took steps to unify Syria's religious curriculum for the first time, having direct control over the content of religious education, while also gaining the authority to hire and fire the staff at these institutes—surveilling, controlling, and if necessary, repressing the clerics of Sunni Islam.[114] The secular order depended on the marginalization and subjugation of Islamic associations and institutions in order to keep religion out of the realm of political influence and to preserve national unity—arguably a synonym for maintaining regime security.

With the outbreak of the Syrian Civil War following anti-regime protests in the midst of the Arab Spring in 2011, government crackdowns on Islamic associations largely fell along partisan lines: those that supported or sided with the opposition experienced intensified repression, leaving room for those that stood by the regime to expand their influence in Islamic circles.[115] However, while Syria did experience an indigenous development of more radical ideologies in response to the pressures of the secular state, two external trends significantly influenced the rise of religious extremism in Syria following the outset of war.

Firstly, the involvement of outside actors in the Syrian Civil War notably shaped the roles and ideologies of belligerent Islamist groups. Salafi networks from Gulf nations funded armed

[112] Rifai, "Sunni Religious Landscape," 5.

[113] Ibid, 5-6.

[114] Ibid.

[115] Ibid, 7-11.

opposition groups, holding sway over their religious components and shifting the Syrian Sunni paradigm that had been previously centralized by the unified government-imposed religious curriculum.[116] Western nations, by imposing sanctions on the Assad regime and by lifting oil embargos aimed to serve as economic support for the rebels, inadvertently allowed for the growth of more extreme Islamic militant groups.[117]

Secondly, the rise of the Islamic State in Iraq and Syria (ISIS) further demonstrated the embodiment of secular and sectarian pressures as religious violence. As mentioned earlier in this case study, Bashar al-Assad's relaxed policy of allowing fighters to enter Iraq in the late 2000s to fight U.S. forces resulted in the subsequent return of more radicalized combatants to Syria.[118] This trend seemed to repeat itself in the mid-2010s with the crossing of ISIS into Syria from Iraq, spurring a massive influx of foreign fighters and their respective jihadi ideologies. Although ISIS itself emerged from Al-Qaeda in Iraq, thus emanating from a non-Syrian context, the group's political ambitions in the 2010s were adapted to fit and address the Syrian context in which the group was fighting, notably by playing into the fears of the local Sunni population in opposition to the Alawite-led secular order that had excluded Sunnis for decades.[119] This was further achieved by ISIS presenting itself as an alternative form of government to opponents of the Assad regime, exploiting the sectarian conflict that surfaced following the start of the civil war.[120]

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[116] Kheder Khaddour, "The Islamic Sphere During the Syrian Uprising," in Localism, War, and the Fragmentation of Sunni Islam in Syria, Carnegie Endowment for International Peace (2019): 9, http://www.jstor.org/stable/resrep20968.6; Jasser, "Sectarian Conflict in Syria," 64.

[117] Willem Theo Oosterveld, et al. "The Rise and Fall of ISIS: From Evitability to Inevitability," Hague Centre for Strategic Studies, 2017, 7-8, http://www.jstor.org/stable/resrep12613; "EU Lifts Embargo on Syrian Oil Exports, Investment," Associated Press, April 22, 2013, https://www.france24.com/en/20130422-eu-lifts-embargo-syrian-oil-exports-investment.

[118] Khaddour, "State Control and Localism," 4.

[119] Oosterveld et al. "Rise and Fall," 13.

[120] Ibid, 17.

Bashar al-Assad employed both of these external trends—the radicalization of the opposition and the rise of Islamic terrorist groups—to support his wartime rhetoric of fighting Sunni extremism and maintaining a secular order in the face of the establishment of an Islamic state that would prevail against Syria's religious minorities.[121]

Secularism has been a pillar of Syria's social and political order since the emergence of Ba'athist ideology and has been maintained through the Assad regimes—among the tools of the secular structure in Syria are the intense suppression of religious groups, the shaping and regulation of religious education, and the direct state control of religious institutions, perpetuating the government's grip on religion and keeping religion from entering the political sphere. Although Syria has faced major geopolitical challenges that have seemingly overturned the existing social order, the civil war has only cemented the impacts and consequences of secularism, demonstrated by the rise of religious extremism and of terrorist organizations, in turn affecting the entire Middle East and countries beyond.

Analysis and Findings

In analyzing the policy decisions made and social agendas pursued by the governments of Egypt and Syria throughout the late-20th and early-21st centuries, secularism can be seen as a driving force behind significant political action and social organization. Although the two states have vastly different intellectual and ideological legacies, commonalities arise in terms of the mechanisms and tools used in order to keep religion outside of, and subservient to, politics.

Firstly, the suppression of Islamist groups, whether extremist or not, has been the primary action undertaken through the incarceration of group members, the cracking down on group

[121] Jasser, "Sectarian Conflict in Syria," 64.

activities, or the use of coercive force. The suppression of Islamist groups is also a temporal commonality: regimes at different points in history have resorted to the same repressive policy, whether Nasser or Sisi, Hafez or Bashar. This mechanism of the secular apparatus of these governments is the most impactful in terms of influencing a rise in religious extremism. The years of oppressive conditions under Nasser, shaping Islamists such as Sayyid Qutb into jihadists, initiated a process of radicalization that would culminate in the assassination of Sadat, spurring a continuous battle between the Mubarak regime and political Islam. Despite the Muslim Brotherhood's several attempts at achieving political legitimacy, the rise of religious extremism in turn shaped the oppressive nature of the secular apparatus itself. The Ba'athist marginalization of Syria's religious majority bred anti-secular tensions that erupted into a jihadism that opposed itself to the secular order in time of conflict. Conciliatory attempts by Sadat and Hafez al-Assad were to no avail. Suppression as a tool of secularism in the Middle East has contributed to the development of religious extremism, and suppression as a political mechanism extends beyond Egypt and Syria to other non-"reactionary" states such as Algeria and Iraq.

Secondly, the shaping of systems of education and their curricula is another action undertaken by secular regimes in the Middle East. In Egypt, the government has aimed to build a secular curriculum that excludes religion in its content, which is a stark contrast from many other Arab states. In Syria, the government has aimed to centralize and unify religious curricula in order to more easily dictate its content. Though these approaches vary in their regulation of two different systems of education, the objective of separating religious education from its traditional influence on public life is the same. By removing Islamic texts from curricula in the name of fighting extremism, or by taking the authority of religious education out of the hands of its

institutions, support for Islamism and the greater integration of religion with education, and in turn public life, grows—though without reform or change, regimes give rise to more desperate measures being taken by Islamist groups wanting to exact change in the social order.

Thirdly, the direct control of religious institutions is a vital tool in the exercise of the secular apparatus in the Middle East. Serving as an effective mechanism to consolidate political authority over religious life, this direct control maintains the hierarchy that relegates religion outside of public life, upholding the existing secular order. Whether through the nationalization of major religious institutes such as Al-Azhar, or through the organization of a vast and powerful Ministry of Religious Endowments to serve as the bureaucratic instrument of regulation and compliance, direct state control has been an effective and meticulous tool of secular Arab governance. By removing the autonomy of these institutions, however, and by relegating religious authority as subservient to the state, anti-secular sentiment has grown, giving greater agency to the emerging extremist groups that aim to elevate and remedy the second-tier status of religion.

After having observed the historical trends of policies and actions taken by Arab governments using the above mechanisms, the question arises as to what model of secularism, if any, has been demonstrated in these Middle Eastern case studies. As mentioned in the introduction of this paper, the modern Eurocentric conceptualization of secularism stems from an long intellectual tradition that itself emerged out of centuries of the declination of religion in the public sphere. Therefore, comparing the existence and characteristics of Middle Eastern secularism to any Western model may seem irrelevant or inappropriate. To this point, it must be noted that a strong connection between secularism in both regions can be established due to the ideology of (though not necessarily the practice of) secularism in the Middle East being derived

from that of Western Christendom: the pursuit of Arab Modernism in Egypt was based on European standards of political and social organization, and the Ba'athist founders of Syria cultivated much of their nationalistic and secular ideals through their studies at the Sorbonne.

However, the American model of the tolerance of religion does not accurately represent the policies of Middle Eastern secularism, given the prolonged conflicts between secular governments and Islamist groups—the fight against extremism that has become a pillar of holding onto power. Furthermore, both Egypt and Syria constitutionally enshrined a state religion, albeit at the behest of political Islam in an aim for conciliation, rendering the foundational tenets of American secularism as inapplicable in a Middle Eastern context. The French model of the rejection of religion seems more appropriate and relevant in accordance with the trends observed in the case studies—at least initially. Upon closer examination, although Egypt and Syria have aimed at achieving an absence of religion in the political and public spheres, the acceptance of Islam as a powerful social force by numerous regimes runs counter to the essential elements of *laïcité* that would not be able to balance political secularism with a force of socio-religious cohesion. In conclusion, a distinct model of secularism has emerged in the Middle East as a product of government actions and policies, aiming to achieve the political-social balance through the exercise of the aforementioned mechanisms. Middle Eastern states that strive for secularism ultimately aim to exercise state authority in a way that makes it superior to religious forces. However, the consequences of this form of secular governance, and the overall consolidation of political power over religious life, have had lasting effects on the religious realm, shaping Islamist thought into believing that increasingly radical action is necessary to combat the prevailing secular order.

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